

2016 Tax Grouping Update
December 2016

CCH® ProSystem fx® Workpaper Manager version 7.1

Welcome to CCH® ProSystem fx® Workpaper Manager 2016 Tax Grouping Update

This document provides important information about the 2016 Tax Grouping Update release of CCH ProSystem fx Workpaper Manager for version 7.1. Please review this information carefully. If you have any questions, the additional information is available on [CCH Support Online](#).

The 2016 Tax Grouping Update should be run all Workpaper Management, Terminal Server Client, Terminal Server Database, and Administrator installations of CCH ProSystem fx Workpaper Manager.

Note: The 2016 Tax Grouping Update is available for CCH ProSystem fx Workpaper Manager versions 7.1, 7.2 and 7.5. If you are running an older version of Workpaper Manager, you must upgrade to a supported version before installing the update.

2016 Tax Grouping Update

There were no changes to the tax codes for CCH ProSystem fx Workpaper Manager for 2016. The 2016 Tax Grouping Update includes:

CCH® ProSystem fx® Tax and CCH Access™ Tax

- The Tax Grouping Update Wizard will update tax grouping lists to 2016 tax codes.
- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Lacerte®

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

GoSystem® Tax

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

UltraTax CS®

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Import Conversion Wizard

- Supports 2016 tax groupings from CCH® ProSystem fx® Trial Balance, CaseWare®, Creative Solutions Accounting™, GoSystem® Audit with links to CCH ProSystem fx Tax, GoSystem® Tax and Lacerte® 2016 tax groupings.

How to Install

1. Close CCH ProSystem fx Workpaper Manager before running this update.
2. Close all Microsoft® Office applications, such as Word, Excel® and Outlook®.

Note: If you have installed the Microsoft® Security update that was released 7/14/2015 (KB3072630), please refer to Workpaper Manager Knowledge Base article [sw45632](#) before proceeding. It is critical you follow the instructions in this article *before* updating, so that you do not encounter any issues when running the 2016 Tax Grouping Update.

3. Click **Download file** next to *Workpaper Manager v. 7.1 December 2016 Update (includes the 2016 Tax Grouping Update)* in the 'Release 7.1' section of the [Workpaper Manager Support website](#).
 - The *Update (EXE)* files can be installed on all supported operating systems. This file also provides elevated privileges for installations on machines with Microsoft® Windows Vista®, Windows® 7, Windows® 8.1, Server 2008, Server 2008 R2, and Server 2012 operating systems.

- The *Update (MSP)* file allows for push installations. It is designed for use with Microsoft® Active Directory® Group Policy installations.
4. Click **Download file** next to *Update (EXE)* to begin the installation.
 5. Follow the on-screen steps to complete the update.

Notes:

- The Workpaper Manager log file *7.1_2.1 Update 122016.txt* will be saved to the Pfx Engagement > Common folder. You can check for this file or in the Programs and Features > View installed updates section to confirm if the update has been installed.
- For customers upgrading Workpaper Manager 7.1 to version 7.5, a new version of the Workpaper Manager 7.5 installer will be posted to Software Delivery Manager that will include all updates released for 7.5. Click to find out [how to install Software Delivery Manager](#).