Welcome to Engagement 2021.3.1

This bulletin provides important information about the 2021.3.1 release of CCH® ProSystem fx® Engagement. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

Important: Information on installing Engagement is in the Knowledge Base article Installation Guidance for CCH ProSystem fx Engagement on CCH Support Online. Also, a Deployment Planning Guide is available in the Documents folder with the Install Media.

Deployment Information

2021.3.1 Provided on Software Delivery Manager
This Engagement 2021.3.1 release is only available through Software Delivery Manager and uses an MSI for upgrading your workstations. It will not be available to download directly from our Support site.

The following firms should install this 2021.3.1 release on all servers and workstations:

- Your firm has not previously installed a release of Engagement.
- Your firm is upgrading from a 2019, 2020, or prior 2021 release of Engagement to work with all features and resolved issues.

Note: For firms with an earlier version of 2021 already installed, there is no database upgrade when deploying this latest release. This allows for workstations to be upgraded separately from the server. A firm can work in a mixed environment if all machines have any 2021 release installed. We do, however, highly recommend that all workstations are updated with this release.

New in this Release - Engagement

2022 Tax Grouping Update
The 2022 tax grouping update includes the following:

- **CCH® ProSystem fx® Tax and CCH Axcess™ Tax.** For details, refer to these [tax line charts](#).  
  - The Tax Grouping Update Wizard will update tax grouping lists to 2022 tax codes.
  - New 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types.

- **Lacerte®.** For details, refer to these [tax line charts](#). New 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity types.

- **GoSystem® Tax.** For details, refer to these [tax line charts](#). New 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, and Exempt tax entity type.

- **UltraTax CS®.** New 2022 tax grouping lists are available for Corporation, S Corporation, Partnership, Exempt, and Individual tax entity types.
Included from Prior 2021 Releases

This 2021.3.1 release includes all updates from prior 2021 releases of CCH ProSystem fx Engagement and CCH® ProSystem fx® Knowledge Coach. A link to the release notes from each of those 2021 prior releases can be found on the Guides tab of our product page.

Recommended Best Practices from Our Support Team

Following are some best practices recommended by our Support team:

- Create scheduled tasks for backing up your databases and managing central bins.
- When rolling out new computers, deploy 64-bit SQL.
- For your Microsoft® Office 365™ subscription, we recommend the semi-annual channel or manually scheduled updates.
- Before upgrading your operating system, please refer to this Knowledge Base article.
- Engagement may not work as expected if there is insufficient drive space when upgrading Microsoft® Windows® 10. The application may require a repair to address component errors after deploying major version updates.

Other Information

Information on technical and application-specific considerations in the following Knowledge Base articles on CCH Support Online:

- Technical Considerations for CCH ProSystem fx Engagement
- Application-Specific Considerations for CCH ProSystem fx Engagement

CCH Software News Delivers Valuable Product Information via Email

CCH Software News delivers technical bulletins, tax and technical discussions, and product update information directly to your email. Subscribing to CCH Software News ensures that you are kept abreast of pertinent issues which affect your CCH ProSystem fx products.

If you provided an email address with your order, you are already registered for CCH Software News. We encourage you to visit our product page and click on CCH Software News Profile Setup to review your CCH Software News profile and ensure that you are receiving information for all the CCH ProSystem fx products relevant to you.