

# CCH<sup>®</sup> ProSystem *fx*<sup>®</sup> Planning

## Welcome to CCH ProSystem *fx* Planning 2017.02000

This bulletin provides important information about the 2017.02000 release of CCH ProSystem *fx* Planning Product. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

## New in this Release

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### 2019 and Later Updates

Extension of California 10.3%, 11.3%, and 12.3% tax rates

### State Standard Deduction Updates

- District of Columbia 2017 standard deduction amounts
- Rhode Island 2017 standard deduction amounts

### State Tax Bracket and Rate Updates

- Maine 2017 tax bracket and rates
- Minnesota 2017 tax bracket
- Rhode Island 2017 tax bracket

**Reminder:** To import a 2015 tax return to CCH ProSystem *fx* Planning v. 2017.01010, your plan should have a start year of 2015. CCH ProSystem *fx* Planning v. 2017.01010 defaults to a start year of 2016. To change the start year of your plan please follow the steps below

1. In CCH ProSystem *fx* Planning, open the client you would like to import from 2015 CCH<sup>®</sup> ProSystem *fx*<sup>®</sup>Tax.
2. Open Plan Properties (**File > Plan Properties**, Ctrl + R, or by clicking the icon on the toolbar).
3. Click on the **Configuration** tab.
4. Select **2015** from the **Start year** list.
5. Click **OK**.
6. Start import by going to the File menu and selecting **Import > CCH ProSystem *fx* Tax**.
7. Click **OK**.

**Note:** These steps can also be found on <https://support.cch.com/kb/solution.aspx/sw46154>

## Installing CCH ProSystem fx Planning

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Refer to the CCH ProSystem fx Planning Instruction Guide for complete information on installing and using CCH ProSystem fx Planning.

### Please follow the instructions below to install this release

Real Time Virus Scan Reminder: The Planning directory structures must be excluded from the virus scan on workstations and servers for the program to install and/or run properly.

#### Installation Steps:

1. Download the release image from Software Delivery Manager. You will be asked to **Save** the self-extracting executable. It is recommended to save the file to the default location.
2. Double-click the self-extracting executable to launch the installation. If the files are extracted already, then select **Start > Run** and type **?:\Setup** (where ? represents the location of the install files) and click **OK**.
3. Click **Next** on the *Welcome* screen to display the Type of Installation window.
4. Select either a **Network** or **Standalone** install.
5. Click Next to continue.
6. Select the destination location for the program files. You can accept the default location, or browse to a different location.
7. Click **Next** to continue.
8. At the *Permission File* screen, select one of the permission key options to find your 2016 permission key and click **Next**. The option to download your permission file from the Internet requires a Single Sign-On (SSO) account login.
9. Select the features you want to install.
10. Click **Next** to continue.
11. If you are doing a Network install, select the **Planning Default** option and click **Next**.
12. Select the desired program group for your CCH ProSystem fx Planning icon.
13. Click **Next** to continue.
14. Click **Install** to begin the installation.
15. Once the installation is complete, reboot your PC to ensure that all system files are properly initialized.

**Note:** When installing from a network, you must run **?:\Accuplnr\setup** (where ? is your network drive) on each workstation that will run Planning. The Type of Installation defaults to Workstation Setup. Each workstation must be re-booted after workstation setup is complete.