CCH® ProSystem *fx*® Scan

Welcome to CCH® ProSystem *fx*® Scan v20.0

This bulletin provides important information about the v20.0 release of CCH ProSystem *fx* Scan. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Term Code Column on Gain and Loss Validation
While reviewing gain and loss details in Validation, transactions with "VARIOUS" on Date Acquired or Date Sold are now identified with a Conflict. Use this Conflict to enter an override for the calculated term. Enter "S" for short-term transactions and "L" for long-term transactions.

Forms & Fields
The following enhancements have been added for various forms and fields:

- Form 1098-C has been added to the 1040 Catalog.

- Form 1099-K has been added to the 1040 Catalog.

- On Form 1098-T, Dependent Number is now available during Validation. After selecting a return, the Dependent Number is pulled from Tax based on SSN and Name.

- On Schedule K-1's, Activity Number and Activity Name/Description now display in the Link action from the Review Tax Forms window.

Better Classification and Extraction
Algorithms for classifying and extracting data on all forms have been upgraded allowing for more forms to be recognized more accurately.

CCH® ProSystem *fx*® Funnel
The following enhancements have been added to Funnel:

- Keyboard shortcuts are now available for the main ribbon bar and new job window. A complete list can be found in Help.

- A Close button has been added to close a job while keeping Funnel open.

CCH® ProSystem *fx*® PDFlyer Supports New Adobe® Acrobat® 64-bit User Experience
Adobe® Acrobat® DC 64-bit User Experience is now supported.

EULA Removed during Installations
The EULA has been removed from installations for Scan Administrator, Scan Workstation, and PDFlyer. Please refer to the Master Service Agreement for terms.

Installing Scan

Online Software Delivery
We deliver all software exclusively through downloads. For more information on online software delivery, including FAQs and system requirements, please visit Software Delivery.

Catalog updates are available via the Scan Support website or through automatic updates in Scan Administrator. They are delivered weekly, as needed, from January through April 15, with one final catalog update just prior to extension deadline. Our policy is to support forms for the current tax year and the two prior tax years. This policy ensures accuracy and minimizes catalog size and download times.

Please refer to the Scan system requirements tab of our product page on the support website for additional information.

Installing Scan Administrator
If you are updating from a previous version of Scan, the installation automatically detects a previous version of Scan and removes it.

Note: Scan is memory- and CPU-intensive. We recommend that you do not install Scan on a server or workstation that houses other critical applications, as it will degrade the performance of the other applications. Scan can be installed on a high-end workstation, if necessary, to avoid this issue. Import, export, and archive folders can be located on a separate server or file share.

Microsoft® .NET Framework 4.8 must be installed on the server or dedicated workstation running Scan Administrator. If you have not already installed .NET Framework 4.8, it is installed for you during the installation process.

The following steps guide you through installation of the Scan Administrator program files if you do not use a Scaled Server installation. If you use a Scaled Server installation, please contact Customer Support at 1-800-PFX-9998 (1-800-739-9998) for assistance.

1. Log in to the server or dedicated workstation where you plan to install Scan v20.0. Verify that your account has Administrator rights.

2. Download and launch **prosystem_fx_scan_20.0.0.12.exe**.

3. Click **Next**.

4. If needed, change the destination folder where Scan should be installed by clicking **Browse** and navigating to or entering a new location. The default import, archive, and export folders are added to the Scan shared folder as part of the installation process.

5. Click **Install**. Wait for the installation to complete.

6. Select the permission key option for this installation.

7. Click **Next**.

8. Click **Finish**.

Installing Scan Workstation
If you are updating from a previous version of Scan Workstation, the installation automatically detects the previous version of Scan Workstation and removes it.

Microsoft® .NET Framework 4.8 must be installed on each workstation running Scan Workstation. If you have not already installed .NET Framework 4.8, it is installed for you during the installation.

To install the Scan Workstation program files, do the following:

1. Browse to **\\<computer name>\Workstation**.

2. Launch **ProSystem fx Scan Workstation.exe**.

3. Click **Next**.

4. If needed, change the destination folder where Scan Workstation should be installed by clicking **Browse** and navigating to or entering a new location.

5. Enter the Scan Main Server Machine Name where Scan Administrator is installed.

6. Click **Next**.

7. Click **Install**. Wait for the installation to complete.

8. Click **Finish**.

Installing PDFlyer

Please refer to the PDFlyer system requirements tab of our product page on the support website for additional information.

Microsoft® .NET Framework 4.8 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 4.8, it is installed for you during the installation.

To install the PDFlyer program files, do the following:

1. Browse to **\\<computer name>\Workstation**.

2. Launch **ProSystem fx PDFlyer.exe**.

3. Click **Next**.

4. If needed, change the destination folder where PDFlyer should be installed by clicking **Browse** and navigating to or entering a new location.

5. Click **Install**. Wait for the installation to complete.

6. Click **Finish**.