

CCH[®] ProSystem *fx*[®] Scan

Welcome to CCH ProSystem *fx* Scan v21.0.1.18

This bulletin provides important information about the v21.0.1.18 release of Scan. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Scan Optimizer

Scan Optimizer runs two OCR engines against data on forms. The results from each OCR engine is compared against each other, and when the results do not match 100%, the non-matching fields is displayed to the user in the AutoFlow Validation screens for action. [Learn about Scan Optimizer](#). This feature increases the processing time for files and can be turned off in General Settings in Scan Administrator, although not recommended.

AutoFlow Review Tax Forms

A Minimize/Maximize button has been added to the top of the AutoFlow Review Tax Forms window for a wider view.

Search Box for Tax Returns

When searching for a tax return by SS or Client ID, the search box window has been expanded to display 25 characters (previously 12 characters).

Forms & Fields

The account number is now added to the extracted data for Form 1099-K.

Classification and Extraction

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

New Adobe[®] Acrobat[®] Classic

CCH[®] ProSystem *fx*[®] PDFlyer now supports Adobe[®] Acrobat[®] Classic version.

Known Issue

PDFlyer License File

Reports of slowness opening and executing the license file have been remedied.

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 release just prior to extension season. Our policy is to support forms for the current tax year and the two prior tax years immediately preceding it. 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 v21.0. Verify that your account has Administrator rights.
2. Download and launch **prosystem_fx_scan_21.0.1.18.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

PDFlyer system requirements can be found at CCH [Support Online](#).

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**.