

CCH[®] ProSystem fx[®] Workpaper Manager

Welcome to Workpaper Manager 2021.3.1

This bulletin provides important information about the 2021.3.1 release of CCH ProSystem fx Workpaper Manager. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Important: Information on installing Workpaper Manager is in the knowledge base article [Installation Guidance for CCH ProSystem fx Workpaper Manager](#) 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 Workpaper Manager 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 Workpaper Manager.
- Your firm is upgrading from a 2019, 2020, or prior 2021 release of Workpaper Manager 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 - Workpaper Manager

2022 Tax Grouping Update

The 2022 tax grouping update includes the following:

- **CCH[®] ProSystem fx[®] Tax and CCH Axxess[™] 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* Workpaper Manager. 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](#).
- Workpaper Manager 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* Workpaper Manager](#)
- [Application-Specific Considerations for CCH ProSystem *fx* Workpaper Manager](#)

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