

CCH® ProSystem fx® Workpaper Manager version 7.5

Welcome to CCH® ProSystem fx® Workpaper Manager v7.5 2016 Tax Grouping Only

Attention: If you have installed the CCH ProSystem fx Workpaper Manager 7.5 December 2016 Update, the 2016 Tax Grouping Update is already installed and there is no need to install this version of the release.

This document provides important information about the 2016 Tax Grouping Only release of CCH ProSystem fx Workpaper Manager for version 7.5. This release contains the 2016 tax groupings for users that do not want to install the additional features as provided in the recently released CCH ProSystem fx Workpaper Manager 7.5 December 2016 Update. Please review this information carefully. If you have any questions, additional information is available on [CCH Support Online](#).

This 2016 Tax Grouping release should be run all Workpaper Management and Terminal Server Client installations of CCH ProSystem fx Engagement.

2016 Tax Grouping Update

There were no changes to the tax codes for CCH ProSystem fx Workpaper Manager for 2016. The 2016 Tax Grouping release includes:

CCH® ProSystem fx® Tax and CCH Access™ Tax

- The Tax Grouping Update Wizard will update tax grouping lists to 2016 tax codes.
- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Lacerte®

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

GoSystem® Tax

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

UltraTax CS®

- New 2016 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Import Conversion Wizard

- Supports 2016 tax groupings from CCH® ProSystem fx® Trial Balance, CaseWare®, Creative Solutions Accounting™, GoSystem® Audit with links to CCH ProSystem fx Tax, GoSystem® Tax and Lacerte® 2016 tax groupings.

How to Install

1. Close CCH ProSystem fx Workpaper Manager before running this update.
2. Close all Microsoft® Office applications, such as Word, Excel® and Outlook®.
3. Click **Download file** next to *CCH ProSystem fx Workpaper Manager v7.5 2016 Tax Groupings Only* in the 'Release 7.5' section of the [Workpaper Manager Support website](#).
 - The CCH ProSystem fx Workpaper Manager v7.5 2016 Tax Grouping Update.exe can be installed on all supported operating systems. This file also provides elevated privileges for installations when necessary.
 - This update will only install on systems where CCH ProSystem fx Workpaper Manager v7.5 is installed.

Notes:

- The log file 7.5 2016 Tax Groupings only Update.txt will be saved to the Pfx Engagement > Common folder.