CCH® ProSystem *fx*® Engagement

Welcome to CCH® ProSystem *fx*® Engagement 2018 Tax Grouping Update

This bulletin provides important information about the 2018 Tax Grouping Update release of CCH ProSystem *fx* Engagement for v7.5. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

The 2018 Tax Grouping Update should be run all Workpaper Management, Terminal Server Client, Terminal Server Database, and Administrator installations of CCH ProSystem *fx* Engagement.

Note: The 2018 Tax Grouping Update is available for CCH ProSystem *fx* Engagement versions 7.5, 2017 and 2018. If you are running an older version of Engagement, you must upgrade to a supported version before installing the update.

New in this February 2019 Release

2018 Tax Grouping List Template Update
The following 2018 tax grouping list templates (.AZG files) were updated as detailed in the Knowledge Base article here.

- 2018 C-Corp - ProSystem fx Tax

- 2018 S-Corp - ProSystem fx Tax

- 2018 Exempt Org - ProSystem fx Tax

- 2018 S-Corp - Lacerte

- 2018 S-Corp - UltraTax

   Important: The updated templates are applicable only when creating 2018 tax grouping lists by importing from the Account Groupings - Grouping List Options dialog. The update has no effect on 2018 tax grouping lists created by running the Tax Grouping Update Wizard.

Provided in January 2019 Release of 2018 Tax Grouping Update

The 2018 Tax Grouping Update includes the changes as detailed in https://support.cch.com/kb/solution/000094697

CCH® ProSystem *fx*® Tax and CCH Axcess™ Tax
- The Tax Grouping Update Wizard will update tax grouping lists to 2018 tax codes.

- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

Lacerte®
- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

GoSystem® Tax
- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership and Exempt tax entity types.

UltraTax CS®
- New 2018 tax grouping lists available for Corporation, S Corporation, Partnership, Exempt and Individual tax entity types.

How to Install

1. Close CCH ProSystem *fx* Engagement before running this update.

2. Close all Microsoft® Office applications, such as Word, Excel® and Outlook®.

   Note: If you have installed the Microsoft® Security update that was released 7/14/2015 (KB3072630), please refer to Engagement Knowledge Base article sw45632 before proceeding. It is critical you follow the instructions in this article before updating, so that you do not encounter any issues when running the 2018 Tax Grouping Update.

3. Click **Download file** next to Engagement v7.5 February 2019 Update (includes the 2018 Tax Grouping Update) in the 'Release 7.5' section of the Engagement Support website.

   – The Update (EXE) files can be installed on all supported operating systems. This file also provides elevated privileges for installations on machines with Microsoft® Windows® 7, Windows® 8.1, Windows 10, Server 2008 R2, Server 2012 and Server 2012 R2 operating systems.

   – The Update (MSP) file allows for push installations. It is designed for use with Microsoft® Active Directory® Group Policy installations.

4. Click **Download file** next to Update (EXE) to begin the installation.

5. Follow the on-screen steps to complete the update.

Note: The Engagement log file 7.5_2.5 Update 022019.txt will be saved to the **Pfx Engagement > Common folder**. You can check for this file or in the Programs and Features/View installed updates section to confirm if the update has been installed.