

## CCH Personal Tax – A new face for an old friend



Starting in February 2008, accounting practices throughout the UK have been upgrading from PerTAX to CCH Personal Tax (previously known as PerTAX08 or PerTAX .NET).

Hundreds of accounting practices are now enjoying the new and enhanced functions of the software. Features like the automated Workflow system, optimised data entry and real time error and exception reporting make their tax work faster, easier and more reliable.

On the following pages, some of these clients explain in their own words how the software has helped them.

CCH Personal Tax works for them and it can work for you, too. To book your free upgrade\*, contact your CCH Account Manager on 0844 56 18181.

\* Existing PerTAX users are entitled to a like for like upgrade to CCH Personal Tax without charge for the software. Installation and additional training will be charged for if required.



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“The conversion from Taxpoint to CCH Personal Tax was remarkably smooth.”

We naturally assumed there would be a few issues to deal with – there usually are when you’re upgrading systems – but everything went through without a hitch.

The general performance of the new software is excellent – it looks good and it’s easy to work with.

Because of the straightforward data conversion we’ve been able to carry on our tax work with minimal disruption.

**Stuart Manning**  
RM Walkden

“We had been using Taxpoint since 1992, but our staff prefer CCH Personal Tax.”

The transition from one product to the next was very smooth – we had no difficulties converting our database of over 1,000 clients – and staff found it easy to learn the new software.

We particularly like having the tax computation on screen, updated in real time as you enter and amend figures. Our clients have also told us they prefer the new computation. The error and exception reporting is very useful because it helps staff to identify potential problems, such as failing to enter the State pension for a client who has just reached pension age.

**Tracey Thompson**  
Friend James



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“The biggest difference we’ve noticed with CCH Personal Tax is its reliability.”

It was very frustrating for staff on the occasions when Taxpoint crashed. Since upgrading to the new software we’ve not had any problems like that at all.

We’ve now upgraded from PROcost to CCH Practice Management, which is also a big improvement. Reporting is particularly good – it’s so much easier to set up personalised reports to show exactly what you want. Because all the software runs through CCH Central it brings the data together in one place so it’s a lot easier to access and use.

**Verena Blyth**  
**Hogbens Dunphy**

“Our tax work seems to be progressing a lot faster this year and that’s due in part to CCH Personal Tax.”

We really like the fact that you can view everything together on screen by opening multiple tabs. You can flick between two years’ tax returns, or a husband and wife, or a tax computation and a return; you can look at a client’s schedule then follow everything back to the source figures. Everything takes less time now than it used to.

PerTAX was robust and user friendly, but CCH Personal Tax is even more so and it’s a more comprehensive product than ever before. It’s truly 21st Century.

**Daniel Lumm**  
**Francis Clark**



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“I’m very impressed with CCH Personal Tax. I’d used the older version of PerTAX for many years – the new one just seems a lot more “intelligent”, and the whole user environment is clearer.”

Online filing is definitely a lot quicker. So is data entry, and I particularly like the way you can move from the data entry screens to the tax return. I also really like the facility to lock figures so that they can’t be changed accidentally. I’m in charge of all the personal tax returns in the practice and I’ve found the Workflow system very useful because it enables me to monitor where we are with all our clients.

**Andrei Moiseeff**  
Payne Hicks Beach

“I must admit I was a bit worried at the outset about how easy it would be to get to grips with the new software, but it’s been fine and we’re all very happy with CCH Personal Tax.”

In fact, I’d say that installing the software is one of the best things we’ve done.

We manage around 250 trusts and we do the tax work for most of these. Starting around June or July, we’ve now successfully completed the tax returns for about 95% of our clients. This is a substantial amount of work to do in a few months, but the new software has made it easy.

**Colleen Douglas**  
Freeth Cartwright LLP



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“Previously, the firm had five dedicated tax staff. Now all 35 staff will be completing basic tax returns”

and the tax department will concentrate on the more complex work, such as for partners or overseas residents. The new security features and the Workflow system in CCH Personal Tax will help us put this major change into operation.

**Gareth Dalton**  
Lee Associates

“We’ve seen a number of immediate benefits from using CCH Personal Tax, many of which are to do with making things easier and saving time.”

For example, we can now drill up from a data input field to the SA100 to see which box on the form a figure will appear in. This has been particularly useful this year with the re-design of the SA100 by HMRC – it’s helped us get to grips more quickly with the new form.

**Anne Melville**  
Johnston Smillie Ltd



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“We find the links through to CCH Central very useful.”

It's good to be able to do all your work in a single program and still have access to data from other CCH applications.

**Margaret Macleod**  
**Keen Phillips**

“The software has a good layout and it's easy to use.”

Because of the improved ease of use, it's been well worth the extra effort involved in upgrading. Overall, we're very pleased with CCH Personal Tax.

**Sue Farrell**  
**Hart Shaw**



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“Although it’s our first year of using it, everyone prefers CCH Personal Tax to the old PerTAX. It’s cleaner and tidier all round, and very easy to use.

It’s good to be able to see the tax being worked out as you enter data, and I like the way you can now swap back and forward between a husband and wife to see the effect of splitting bank interest, dividends and other income between them. The in-built validation of data is also very useful if you’ve forgotten something like a date of birth or UTR.

Online filing is very good. It’s simpler than the old software and a little slicker all round, for example the way you’re prompted to save the XML receipt for the submission into the client’s file – that’s nifty.

**Chris Kee**  
**Fitch**



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“From an IT point of view, having CCH Personal Tax working within CCH Central is fantastic – it makes life so much easier.”

Everyone can display the information that they want to see on their own home page, rather than having to hunt around individual applications to find it.

To get the most out of the upgrade, you do need to do a bit of preparation so I'd encourage people to plan ahead. For example, if you're running multiple CCH applications, you might need to flag your tax clients so that you can distinguish them from your accounts clients. That's the kind of thing you need to sort out with CCH when they do the pre-implementation consultancy before the upgrade.

**Daryl Shaw**  
**Sage & Company**



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“I particularly like the enhanced client and status reports.”

As a sole practitioner, it's really useful to be able to get an instant picture of where I am with all my clients. Before we upgraded to CCH Personal Tax I used to maintain a separate spreadsheet to keep track of progress, but the status report does that for me now.

I've been using PerTAX software for some years and I've always found it easy to use; CCH Personal Tax is no exception. I've just started using CCH Trust Tax and I've been able to complete a couple of tax returns already. Filing online is particularly easy.

**Nigel Cummins**  
Cummins & Co

“Because we're running CCH Practice Management, one of the biggest advantages for us is the integration with CCH Central.”

We can now maintain all our data in one place so if there are any client details to change we can do this directly from CCH Personal Tax.

The Workflow system is useful for controlling what's going on – you can see the clients you're working on and check the status of their work. I also like the fact that the software now continually re-calculates the client's tax liability and displays this in real time, so you can see it change as you enter or edit information.

**Stuart Holmes**  
Victor Boorman & Co



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“Overall, we’re happy to have moved to CCH Personal Tax, and the software continues to improve with each update.”

In general, data entry is more intuitive with the new software than with the old. Things that you do on a regular basis – like entering bank interest – are now much easier, which means you save time entering data.

**David Peirson**  
FW Smith Riches & Co

“I particularly like the Workflow system in CCH Personal Tax.”

I used to use a spreadsheet to keep track of where I was with my tax work, but the Workflow system gives me the same information and keeps it constantly up to date. I’ve customised my own home page in CCH Central so that the report is always there – together with my timesheet and my productivity report – so I can tell at a glance how work is progressing and whether I’m waiting on anything from the clients.

It’s really useful to be able to keep multiple tax returns open, for example a husband’s and a wife’s returns, or business partners. I also like the way you can now click on an item in the tax comp and go directly to the data entry for that section.

**Vicki Kirkcaldy**  
Rule Datlen Mann



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“The reporting facilities in CCH Personal Tax are much better.”

We can now prepare individual reports for each partner, showing them the status of their own tax clients, the progress that's been made and the work that's still outstanding. Being able to split the data and tailor the reports like this is a real plus point for us.

**Helen Charity**  
**Knight Goodhead**

“One thing that strikes you immediately is how easy it is to navigate,”

even compared to the previous version of PerTAX, which was already pretty intuitive. I particularly like the ability to view two year's tax returns together and flick between them.

**Athos Louca**  
**Loucas**



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## “Ease of use is the main benefit we’ve noticed.”

The old PerTAX certainly wasn’t difficult to use, but CCH Personal Tax is even easier, particularly data entry. As you save the data, you can click to move forward to the next data entry screen, so the system takes you through what you need to input.

We’d been using PerTAX for some time but had never previously filed online; we’ve found online submission with the new software to be very straightforward. Personally, I’ve not had a single failure when filing online.

**Robert Parish**  
Shoosmiths

## “CCH Personal Tax is really user friendly.”

I’d been using the previous version of PerTAX for many years, but I’ve found the new software pretty easy to adapt to, which is an important consideration. Of course, we’re learning all the time and finding out what the software can do.

Online filing is very straightforward and simpler than anything else I’ve used. Overall, it’s a very good system.

**Graham Sweet**  
AG Tax Limited



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“We’ve only recently upgraded to CCH Personal Tax, but I’m confident that as we become more familiar with the system we’ll discover even more improvements to what was already an excellent product.”

Now that the software works within CCH Central it has direct access to information held in other CCH applications, which can be very useful.

For example, if I’m setting up a new personal tax client as a director of a company, the software can find the company’s name and address details from the CCH Central database. As I type the company name into the Employer field, it will automatically start to find and display matching records; with a single mouse click, company details can be imported. Things like this make tax work easier and quicker.

CCH Personal Tax now allows us to mark each item as complete and to lock further data entry, which helps to highlight outstanding matters when re-visiting particular cases and is a bonus from a managerial point of view.

**Neil Pocock**  
**Spencer Gardner Dickins**



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“CCH Personal Tax works in a very intuitive way.”

I've only recently taken on responsibility for doing the firm's tax work, and I've found it very easy to get to grips with the new software.

I do most of the online filing for the firm. Apart from where we've entered incorrect User IDs and stuff like that, we've not had a single rejection when filing online with the new software. All our partnership returns have now been done and filed online.

**Denise Downey**  
**MJS Willson**

“The new on-screen prompts in CCH Personal Tax are extremely useful to us as we enter client information.”

If an address or a reference number is missing, you're warned there and then. Or say the client is over state pension age, the software will alert you if you haven't entered a retirement pension. Things like this really help to stop mistakes from creeping in.

**Ros Secrett**  
**Maitland Limited**



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“We used to use Sage for tax; CCH Personal Tax is an improvement in several areas.”

It's great to have a summary of the tax calculation on screen, updated in real time as the figures are changed – this is a big improvement over the Sage system. Data entry is a lot easier, too. Many of the data entry screens are pretty much exactly how information appears on the actual tax returns, which makes data entry easier and quicker.

**Ian Myers**  
**Williams Ross Limited**

“Data entry is more streamlined with CCH Personal Tax and that saves time.”

The “Save & Next” button makes it easy to move through the various screens, and you're pretty much guided through the tax return in a logical order, instead of having to move back and forward. Data entry just feels more natural and that speeds up the process of preparing the return.

Because CCH Personal Tax runs within CCH Central, the data is much more accessible, with everything you need close to hand and available straight away.

**Andrew Walker**  
**White Kite**



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“We originally used PerTAX then switched to Digita in 2007; now we’re back using CCH Personal Tax.”

We were immediately struck by the way that CCH Personal Tax can improve the efficiency of our practice. The automated workflow tools, combined with real-time exception reporting and task tracking, mean that we can de-skill the input process and free up our specialists to focus on commission business.

As a growing practice it was essential that we had a scalable solution in place and with that in mind it was a very easy decision to switch.

**Gary Hewitt**  
Teasdale & Co



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