



Case study

## CCH Personal Tax Streets

Streets is a Top 40 firm of chartered accountants, tax specialists and personal financial advisers with 30 partners and directors and over 100 staff. The firm's ten offices are in the East of England, stretching from London to Hull. Clare Slattery is a Tax Consultant in Streets' Lincoln office where the firm's main tax department is based. Here she talks about the firm's decision to replace Digita with CCH Personal Tax.

### When did Streets first install CCH Personal Tax, and why?

Our plan was to implement CCH Personal Tax in time for the 2010 return, so starting around February 2010. Before that we were using Digita software, which we'd had for at least ten years. We had two main issues with Digita: the first was simply an escalation in the annual renewal fee, but the other problem was with the software itself, specifically the reporting functions which we felt were inadequate for our needs. It was fine for producing basic tax returns, but we wanted to be able to use client data proactively in order to offer additional services.

For example, even a simple cross-client report of taxable income will highlight clients who might benefit from some tax planning, pension planning or other added value services. Then there are reports that drill-down to show certain types

of investment, or even specific holdings, about which we might be able to offer advice. None of this was possible before but it is now, using CCH Personal Tax, and it's proving very useful for marketing and client review.

### How did the initial installation go?

We have eight tax technical staff here in Lincoln and another dozen or so in other offices. At the time, quite a lot of the accounts staff were also using the tax software, so about 20 other people had to have some knowledge of it, which meant the installation affected a considerable number of people.

Generally it went OK, although there are always teething problems with new systems and we did have some issues with the conversion of the Digita data. We were up and running for personal tax work shortly after the start of the new tax year, with partnerships and trusts following around June and July. Whenever we reported an issue it would usually be fixed by the next release, so we felt that Wolters Kluwer were being responsive and they were listening to us. Support were really helpful and they were able to sort things out for us pretty quickly.

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### How have staff adapted to the new software?

Obviously it's a challenge to adjust if you've been using a particular system for a long time but I think everyone would agree that CCH Personal Tax is easier to use.

It's clear that a lot of attention has gone into the design of the user interface. Take data entry, for example: if you were entering dividends into the Digita software you would have to go into each shareholding in turn whereas with CCH Personal Tax they're all there together and you can just go down the list, line by line. The CCH software is very easy to navigate which makes it quicker to use.

### Apart from reporting, what other features of CCH Personal Tax stand out?

The way that the computation is updated in real time - that definitely makes planning a lot easier, for example if you're trying to decide what dividends should be paid out to directors for the year, or pension planning, or anything where you need to try out different figures. As you change the numbers you can instantly see the effect on the overall tax liability.

We handle a lot of trust work, so I like the way that income is transferred automatically from a trust return to an individual beneficiary's return. By reducing the amount of re-keying that's needed, the software also reduces the chance of staff missing or mistyping something.

I also like the way that you can have various tabs open together on screen and swap between them - for example a husband and wife, or different tax years - to compare figures or make changes. You can even detach screens, say a computation, so you can view them side by side or on separate monitors.

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CCH Personal Tax continues to develop and improve - for example the parts of the program dealing with both CGT and Class 4 NIC have been redesigned this year. To be totally honest, I wasn't a big fan of the way in which CCH Personal Tax used to deal with Class 4 NIC and it's reassuring to see that the developers were prepared to start from scratch in order to really get it right.

We've set up the CCH Central home pages to display a client list and a filing status graph. Using this, everyone has quick access to their own clients and they can easily check the status of the tax returns they're responsible for. It's very useful to be able to see whether a job is running late and it's very satisfying to watch the list of outstanding returns steadily reducing over the year!

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