



CCH Personal Tax

Simplify and streamline every step in the personal tax return process; from data collection and review, through to approval and online filing.

CCH Personal Tax helps accountancy practices optimise every stage of tax return preparation. Designed for speed, accuracy, and ease of navigation, it reduces manual effort across the compliance workflow so your team can spend less time on administration and more time adding client value.



“The reporting tool for CCH Personal Tax is very good. As a firm we like to be proactive on behalf of our clients, so we use this to identify opportunities where they might benefit from advice or tax planning. It’s simple to produce a report of clients with a certain source of income, or those earning above a particular amount, so that we can market our services accordingly.”

Anne Melville, Associate, Johnston Smillie



Why choose CCH Personal Tax?



- **Complete and file tax returns quickly and accurately.**
- **Reduce manual data entry and the risk of rekeying errors.**
- **Improve consistency across your tax department with standardised workflows.**
- **Speed up online filing with batch e-filing and portfolio visibility.**
- **Use integrated reporting to identify advisory and tax planning opportunities.**

Whether you're preparing straightforward SA100 returns, or managing more complex personal tax portfolios, CCH Personal Tax gives you the tools to create a more controlled, efficient, and client-focused tax process.



Greater e-filing success

CCH Personal Tax incorporates the full HMRC XML framework for validating tax returns, giving your practice a strong online filing process for SA100, SA800, and SA900 returns. Built-in validation helps you spot issues earlier, giving your team greater confidence before submission.



Complete and file tax returns quickly and accurately

The Errors & Exceptions panel highlights problems, inconsistencies and missing information, helping users identify and amend errors before filing. This supports a smoother review process and reduces the risk of last-minute corrections delaying submissions.



Standardise processes across the tax department

Customisable workflow templates guide staff through the tasks they need to complete, helping every member of the practice follow the same procedures every time. This makes it easier to manage workloads, maintain quality, and deliver a consistent client experience across the tax season.



Faster e-filing transmission

Batch e-filing speeds up submissions by allowing multiple returns to be filed efficiently, while progress can be reviewed across client portfolios. Unlock better visibility of outstanding work and easily stay on top of filing deadlines.



Ensure consistent delivery

The Tax Return Bundle feature allows you to predetermine the documents sent to clients, so they can review and authorise the return before submission to HMRC. This creates a more consistent approval process and reduces the risk of missing key documents.



Global mobility support with expat modules

For clients with international tax considerations, CCH Personal Tax's Expat modules support advice around arising versus remittance basis and help teams accurately manage hypothetical tax. You'll gain the flexibility to support a wider range of client needs within the same personal tax workflow.



Integrated reporting for proactive advice

CCH Personal Tax's reporting tools help practices identify trends, opportunities, and client groups that may benefit from additional advice or tax planning. Unlock a practical way to turn tax data into insight.



Part of an integrated CCH software suite

CCH Personal Tax works as part of the wider CCH ecosystem, helping practices connect compliance, client data, workflow, and practice management. By reducing duplicate data entry and improving visibility across the practice, it supports a more efficient end-to-end client journey.

Interested in learning more?

Speak to a member of the team or get in touch.

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