



Case study

CCH Personal Tax Johnston Smillie

Starting life over a century ago as a traditional firm of Edinburgh chartered accountants, Johnston Smillie has grown to become one of the largest independent practices in the city, with three directors, five associates and around 40 staff. Anne Melville is one of Johnston Smillie's associates and the manager of their tax department, in charge of a team of eight.

How long have you been using Wolters Kluwer tax software?

Since the introduction of Self Assessment in 1996/97. At that time it was still PerTAX; we upgraded to the new CCH Personal Tax in 2008.

We're very happy with Wolters Kluwer as a software supplier and we also use CCH Corporation Tax, CCH Accounts Production, CCH Practice Management and CCH Document Management, all running under CCH Central.

What do you particularly like about CCH Personal Tax?

When we upgraded, one of the first things that caught my attention was the ability to display information for spouses or partners side by side and quickly switch between the two. That's still proving very useful. Also, where you have spouses

with joint savings or, say, individuals with a jointly owned property, you just enter the total income, decide on the split between the two and the correct amounts are posted through to both returns. Because the computations are updated in real time, if you make any changes to the split you can see the effect straight away. That not only saves time re-keying data, it also makes the whole process of tax planning much simpler.

How does your Wolters Kluwer tax software fit into the tax return process at Johnston Smillie?

For us the tax season really starts with using CCH Aide-Mémoire to produce a questionnaire to collect the necessary information from our clients. We tried a number of different formats for the questionnaire until we found the one that works best for us, asking just the right amount of information to get the best response.

Our clients supply their data in a number of formats. We still get a lot of paper, of course, but many of them are now scanning and emailing us documents instead. Over time, we expect that electronic data collection will become more and more common so CCH Document Management is invaluable.

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How do your staff find CCH Personal Tax?

Ease of use is definitely one of the strengths of the software. Of course it helps that we use Wolters Kluwer software across the firm, for corporation tax, accounts production, time and fees etc., because when you use one program from the suite it makes it easier to use others. This is particularly true of CCH Central, where things like reporting functions work across the entire suite so you only have to learn the basic functions once.

Within CCH Personal Tax there are some nice touches to make the program easier to use. For example, there's a link to the HMRC online guide straight from the toolbar, so you can bring it up on screen as you're working through a tax return.

We also use some of the CCH online reference material, like the Red and Green Guides to tax legislation, so it's good to have single button access to these from CCH Central.

The free dividends feed for FTSE350 companies is also useful; for many of our clients this covers the vast majority of their holdings and means we can keep track of their dividend income really easily. Simple things like this can make a big difference to usability and it's good to see that someone has thought to include them.

And what about Wolters Kluwer as a company?

Support are great - knowledgeable and very friendly. In general, support queries are answered very quickly. It helps that many of the support staff have been there for a long time, so they've built up a wealth of experience. It's not just that they know the CCH software inside out; they also understand how Johnston Smillie work and what we're trying to achieve for our clients.

What are the advantages of running the Wolters Kluwer applications under CCH Central?

First, there are all the benefits of having a single database, like only having to enter and update client and contact information in one place and knowing that it will be right everywhere. But with CCH Central we get a lot more than this - things like personal home pages that staff can customise to display whatever information they want, for example the status of tax returns for all their clients.

Then on top of that we get the ability to produce cross-client and cross-application reports, combining data from across the CCH software suite. The reporting tool built into CCH Personal Tax itself is very good. It's much easier to use than third-party reporting tools, so you can write new reports very quickly. As a firm we like to be proactive on behalf of our clients, so we use these reporting functions 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.

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Find out how we can help



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