iFirm Intranet Users

Content Guide

Content Hub

In CCH iFirm Intranet, the Content Hub has been designed to let you easily find CCH Business Fitness NZ content. Divided into 5 key areas, the Content Hub provides a central access point for browsing content.

- The Client (client services)
- Queries (a library of frequently asked questions)
- Workpapers & Calculators
- Coaching (business mentoring resources)
- The Firm (practice management)

It's about systems

The CCH Business Fitness NZ content suite is a full systems manual for accounting firms. The content includes a range of tools and resources to help simplify and streamline your business.

- Calculators
- Checklists
- Fact sheets
- Flowcharts
- Forms
- Guides
- Letters
- Policies
- Procedures
- Scripts
- Workpapers

Tools and resources are linked to detailed procedures to ensure tasks are preformed consistently across the firm. And don't forget, with iFirm Intranet, you have the flexibility to customise the content to fit perfectly with your firm.

The Client (client services)

This section incorporates all the services where you interact with your clients, from the initial New Client process, through to Compliance and Value Add to winding up a client relationship.

Starting

This includes the resources needed when beginning new client relationships.

- New client setup process from admin to GL
- ♥ Engagement letters
- ♥ Buying or setting up a business (including due diligence)
- Appraisals
- Business Structures
- IRD Registrations
- IRD Online Services
- ♥ New Entities

Compliance

Your day-to-day accounting processes.

- ♥ Annual accounts incl checklist builder and client questionnaires
- Client annual service plan
- Financial reporting
- Dividend preparation
- Shareholder remuneration review
- Statement of income
- Transitional rules – depreciation
- Working for families

Tax Suite

Current and comprehensive, the tax suite provides procedures and tools to meet your client's tax needs.

- Income tax
- GST
- Mixed use assets
- PAYE
- Provisional tax
- RWT
- Tax residence
- Sales and purchase of land
- IED scheme
- Tax refunds
- Checking UOMI
- Resolving tax debt
- TMNZ
- Engaging a tax specialist
- Tax/risk review
- Tax disputes with IRD

Value Add

As a trusted advisor, you have an opportunity to expand your services beyond accounting and taxes. Use the resources listed below to deliver high quality value add services to clients.

- ♥ Company administration, from company formation, through annual and ongoing admin and wind-up of solvent companies
- ♥ Trust administration
- ♥ ACC administration & advisory
- Virtual CFO
- Client bank accounts
- Client accounts payment
- Employer documentation kit
- Seminars
- Statement of financial performance

Business Development

Use these resources to help grow your client's businesses.

- Business advisory needs flowchart
- Business needs assessment
- Business plan preparation
- Director's meetings facilitation
- Financing

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- Planning days / sessions
- Confidentiality & property management agreements
- Sales & purchases

Profit Improvement

- Customer advisory board
- KPI monitoring
- Management control plans
- Profit & cashflow
- Profit improvement

Ending

- Succession planning
- Valuations
- Business sales reports
- Client deletion procedure
- Dealing with death

Workpapers & Calculators

We've combined the power of Excel with our in-built smarts to deliver a comprehensive set of workbooks.

Workpapers for Annual Financials

- ♥ Integrated with GL (iFirm, MYOB AO & AE, APS, XERO)
- Static workpapers (nonintegrated)
- ♥ Livestock workpapers (integrated and nonintegrated)
- ♥ Dividend workpapers, includes ICA rec and dividend minutes

Calculators

- ♥ FBT
- FIF
- Fixed price agreement
- ♥ GST apportionment
- Loss limitation
- IED scheme cost benefit
- Interest
- Mortgage interest
- ♥ Provisional tax
- Tax – NZ residence
- Working for families kit
- Use of money interest

Business Advisory Calculators

- Working capital
- Breakeven point
- Charge rates
- Debtor days
- Increasing prices
- Discounting
- Profit improvement potential
- Ratio analysis
- Statement of financial performance

Coaching Library

Business mentoring resources, including guides, checklists, forms and calculators for use with clients.

Topics include:

- ♥ Beginning and buying a business
- Financial management
- Accounting systems
- Business systems
- Human resources
- Pricing and margins
- ♥ Debtor management
- Technology in business
- Customer management
- Marketing and selling
- Exporting
- Risk management
- Directorship
- Time management
- Family businesses
- Profit improvement
- ♥ Succession planning
- ♥ Selling the business
- Retirement planning

FAQs

Handy resources to help you deal with common client queries. FAQs include links to scripts, fact sheets and more.

Topics include:

- ACC and claims
- ACC levies and how they work
- Audit
- ♥ Balance dates
- Business interest and RWT
- Business structures
- Client gift expenses
- Employee accommodation
- ♥ Employee versus independent contractor
- Employment relations act and holidays act
- ♥ Entertainment expenses
- ♥ FBT and company vehicles
- Fines
- FIF
- Foreign superannuation tax rules
- GST and commission based insurance agents
- GST ration option
- ♥ Home office expenses
- IRD tax disputes
- ♥ KiwiSaver
- Livestock valuation methods
- ♥ Minimum wage
- Mixed use assets
- Parental leave
- Partnerships and allocating profits
- PAYE Intermediary subsidy
- Payments to spouses
- PPSA/PPSR
- PPSR discharge
- Property and tax
- ♥ Provisional tax
- Public holidays and closedown periods
- QCs and LTCs
- Reimbursing allowances
- ♥ Rental properties
- Shareholder remuneration
- Simplifying tax
- Sponsorship
- Stocktake
- Student allowances and loans
- Tax debt
- Terms of trade
- Travel allowances
- Travel expenses
- Trust administration and legal costs
- Use of money interest
- Vehicles – lease or buy
- Wage subsidies
- ♥ Working for families

The Firm (practice management)

How your business is run behind the scenes directly affects your productivity and customer service levels. Let our procedures help you streamline your administration processes.

Client Contact

- Marketing (Press Kits)
- Appointments
- Client categorisation
- Client screening
- Contact
- Changing contact details
- Newsletters
- ♥ New clients
- Client feedback
- ♥ Queries and complaints
- Records
- Deletions

Day-to-day

These procedures ensure risk management by recording how tasks are done in your firm so they can be delegated or replicated.

- Banking
- Computer system
- Correspondence
- Couriers

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- Mail handling
- Ordering goods and services
- Printing and binding reports
- Reception maintenance
- Stationery & office supplies
- Suggestions
- Telephone answering
- Timesheets
- Workflow

Cashflow

- ♥ Debtors
- Fees
- Fee queries
- Payment of accounts
- Payroll & PAYE
- Petty cash
- ♥ Trust account administration

Annual

- Fixed asset control
- Insurance review
- Office security and maintenance

Team

- ♥ Employment process
- Grievances
- Health & safety
- KiwiSaver
- Leave entitlement
- Team meetings
- Training

Strategic

- ATE application
- Mentor application
- Practice review preparation
- Strategic planning day

Team Knowledge Base

A library of resources that your team can add to.

Rates & threshold table

A popular reference document for the team

Accelerate Client Newsletter

- ♥ Published bimonthly, **Accelerate** contains important tax and business news that your clients will look forward to reading every month. Plus you can even say you wrote it! Publish to email, website and social media. **Accelerate** has both your newsletter and social content sorted.

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