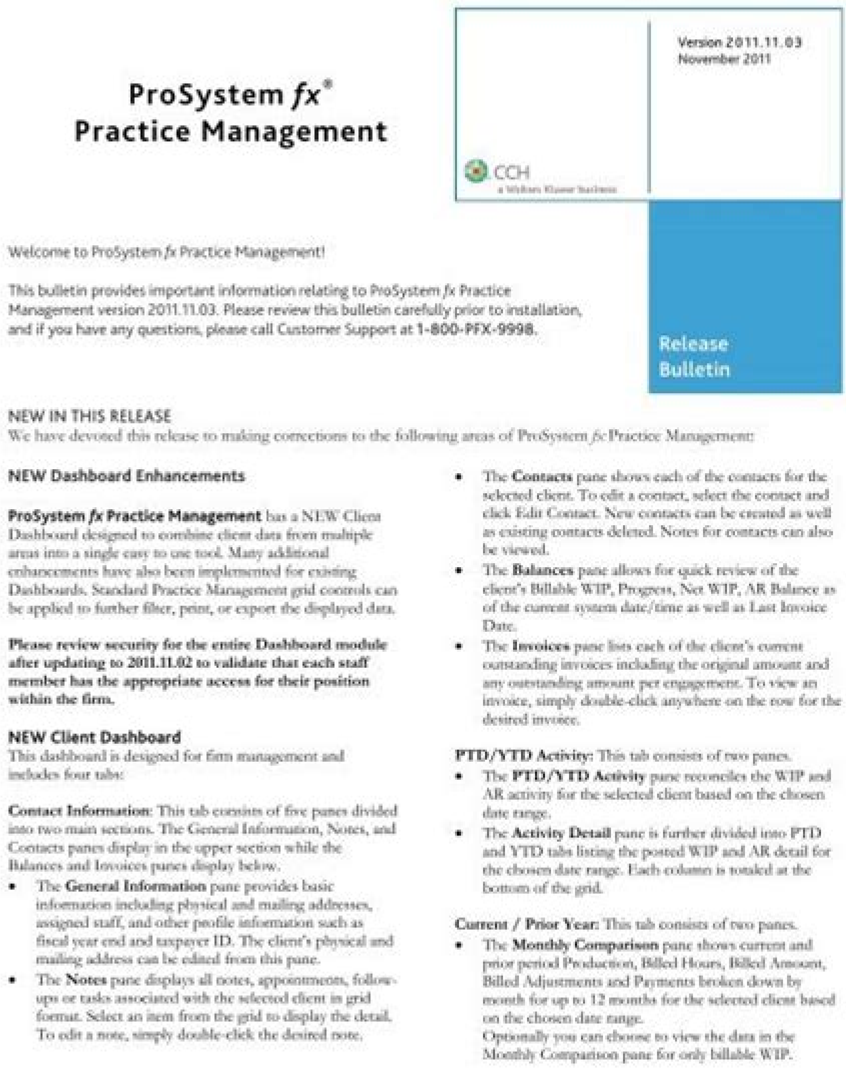
Cch Practice Management Support



ProSystem *fx*®
Practice Management

Version 2011.11.03
November 2011

CCH
a Wolters Kluwer business

Release
Bulletin

Welcome to ProSystem *fx* Practice Management!

This bulletin provides important information relating to ProSystem *fx* Practice Management version 2011.11.03. Please review this bulletin carefully prior to installation, and if you have any questions, please call Customer Support at **1-800-PFX-9998.**

NEW IN THIS RELEASE
We have devoted this release to making corrections to the following areas of ProSystem *fx* Practice Management:

NEW Dashboard Enhancements

ProSystem *fx* Practice Management has a NEW Client Dashboard designed to combine client data from multiple areas into a single easy to use tool. Many additional enhancements have also been implemented for existing Dashboards. Standard Practice Management grid controls can be applied to further filter, print, or export the displayed data.

Please review security for the entire Dashboard module after updating to 2011.11.02 to validate that each staff member has the appropriate access for their position within the firm.

NEW Client Dashboard
This dashboard is designed for firm management and includes four tabs:

Contact Information: This tab consists of five panes divided into two main sections. The General Information, Notes, and Contacts panes display in the upper section while the Balances and Invoices panes display below.

- The **General Information** pane provides basic information including physical and mailing addresses, assigned staff, and other profile information such as fiscal year end and taxpayer ID. The client's physical and mailing address can be edited from this pane.
- The **Notes** pane displays all notes, appointments, follow-ups or tasks associated with the selected client in grid format. Select an item from the grid to display the detail. To edit a note, simply double-click the desired note.
- The **Contacts** pane shows each of the contacts for the selected client. To edit a contact, select the contact and click Edit Contact. New contacts can be created as well as existing contacts deleted. Notes for contacts can also be viewed.
- The **Balances** pane allows for quick review of the client's Billable WIP, Progress, Net WIP, AR Balance as of the current system date/time as well as Last Invoice Date.
- The **Invoices** pane lists each of the client's current outstanding invoices including the original amount and any outstanding amount per engagement. To view an invoice, simply double-click anywhere on the row for the desired invoice.

PTD/YTD Activity: This tab consists of two panes.

- The **PTD/YTD Activity** pane reconciles the WIP and AR activity for the selected client based on the chosen date range.
- The **Activity Detail** pane is further divided into PTD and YTD tabs listing the posted WIP and AR detail for the chosen date range. Each column is totaled at the bottom of the grid.

Current / Prior Year: This tab consists of two panes.

- The **Monthly Comparison** pane shows current and prior period Production, Billed Hours, Billed Amount, Billed Adjustments and Payments broken down by month for up to 12 months for the selected client based on the chosen date range.
  Optionally you can choose to view the data in the Monthly Comparison pane for only billable WIP.

CCH Practice Management Support is an essential tool for accounting firms and professionals looking to streamline their operations, enhance productivity, and improve client service. As the business landscape evolves, the need for effective practice management solutions becomes increasingly critical. CCH Practice Management Support not only offers a comprehensive suite of features designed to manage workflow but also integrates seamlessly with other systems to provide a holistic approach to practice management. This article delves into the various aspects of CCH Practice Management Support, including its features, benefits, implementation strategies, and best practices.

Understanding CCH Practice Management Support

CCH Practice Management Support is a product developed by Wolters Kluwer, a global leader in professional information services. This software is specifically tailored to meet the needs of accounting firms and legal practitioners, allowing them to manage their practices more efficiently. It encompasses a wide range of functionalities designed to improve operational efficiency, including time tracking, billing, project management, and client relationship management.

Key Features

CCH Practice Management Support includes several critical features that make it a preferred choice for many firms:

1. Time and Expense Tracking: Allows users to log billable hours and expenses easily, ensuring accurate billing and client invoicing.
2. Billing and Invoicing: Automated billing processes reduce manual errors and improve cash flow management.
3. Project Management: Facilitates the organization and tracking of projects, enabling firms to meet deadlines and client expectations more effectively.
4. Client Relationship Management (CRM): Helps firms maintain client information, track interactions, and enhance communication with clients.
5. Reporting and Analytics: Offers robust reporting tools to analyze performance, profitability, and productivity, helping firms make informed decisions.
6. Integration Capabilities: Seamlessly connects with other accounting software and tools, enhancing overall functionality.

The Benefits of CCH Practice Management Support

Implementing CCH Practice Management Support can yield numerous benefits for accounting firms, including:

1. Enhanced Efficiency

By automating routine tasks such as time tracking and billing, CCH Practice Management Support reduces the administrative burden on staff, allowing them to focus on higher-value activities. This results in improved overall efficiency and productivity.

2. Improved Client Service

With better organization and management of client information and interactions, firms can provide superior client service. The CRM features enable personalized communication, while timely invoicing and updates keep clients informed.

3. Increased Profitability

Accurate time tracking and streamlined billing processes ensure that firms capture all billable hours and expenses. This can lead to increased revenue and improved profitability.

4. Data-Driven Decision Making

The reporting and analytics capabilities of CCH Practice Management Support allow firms to gain insights into their operations. By analyzing this data, firms can identify trends, optimize workflows, and make better strategic decisions.

Implementing CCH Practice Management Support

The successful implementation of CCH Practice Management Support involves several key steps:

1. Assessing Needs

Before implementing any software, it is essential to assess the specific needs of the firm. This includes identifying pain points in current practices, desired features, and budget constraints.

2. Training and Onboarding

Proper training is crucial for ensuring that all staff members are comfortable using the new system. CCH provides training resources and support to help firms transition smoothly.

3. Data Migration

Migrating existing data into the new system is a critical step. Firms should ensure that client information, historical data, and any other relevant data are accurately transferred to avoid disruptions in service.

4. Customization

CCH Practice Management Support can often be customized to meet specific firm requirements. Taking advantage of customization options can enhance the effectiveness of the software.

5. Ongoing Support and Evaluation

After implementation, firms should continually evaluate the software's effectiveness and seek ongoing support from CCH to address any issues or concerns that arise.

Best Practices for Using CCH Practice Management Support

To maximize the benefits of CCH Practice Management Support, firms should consider the following best practices:

1. Regular Updates and Training

Keeping the software up to date ensures that firms can take advantage of the latest features and security updates. Regular training sessions can also help staff stay proficient in using the system.

2. Utilize Reporting Tools

Make full use of the reporting and analytics tools to regularly review performance metrics. This can help identify areas for improvement and track progress over time.

3. Foster a Culture of Accountability

Encouraging staff to take responsibility for their time tracking and billing can lead to more accurate records and improved profitability. Establishing clear expectations around these processes is essential.

4. Encourage Client Communication

Utilizing the CRM features can enhance client communication. Encourage staff to regularly update client information and log interactions to improve service.

5. Solicit Feedback

Regularly seek feedback from staff and clients regarding the effectiveness of the practice management support system. This can help identify areas for improvement and enhance overall satisfaction.

Conclusion

In an increasingly competitive and complex business environment, CCH Practice Management Support offers accounting firms a robust solution to manage their operations effectively. By leveraging its comprehensive features, firms can enhance efficiency, improve client service, and ultimately increase profitability. Proper implementation, training, and adherence to best practices are essential for maximizing the benefits of this powerful tool. As firms continue to adapt to changing client needs and technological advancements, CCH Practice Management Support stands out as a vital resource in achieving operational excellence and driving growth.

Frequently Asked Questions

What is CCH Practice Management Support?

CCH Practice Management Support is a suite of tools and services designed to help accounting firms manage their operations more efficiently, including time tracking, billing, and client management.

How can CCH Practice Management Support improve firm productivity?

By streamlining workflows, automating routine tasks, and providing real-time insights into practice performance, CCH Practice Management Support helps firms maximize efficiency and focus on client service.

Is CCH Practice Management Support suitable for small firms?

Yes, CCH Practice Management Support is scalable and can be tailored to meet the needs of firms of all sizes, including small and mid-sized practices.

What features are included in CCH Practice Management Support?

Key features typically include time and expense tracking, billing and invoicing, project management, client communication tools, and performance analytics.

How does CCH Practice Management Support enhance client communication?

It offers tools for efficient communication, such as client portals and automated notifications, allowing firms to keep clients informed and engaged throughout the service process.

Can CCH Practice Management Support integrate with other software?

Yes, CCH Practice Management Support can integrate with various accounting and business management software, allowing for a seamless flow of information across platforms.

What kind of support and training does CCH provide for users of their Practice Management Support?

CCH offers extensive training resources, including webinars, tutorials, and dedicated support teams to assist users in maximizing the benefits of their Practice Management Support tools.

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Discover how CCH practice management support can streamline your workflow and enhance productivity. Learn more about optimizing your practice today!

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