

# CCH® Business Fitness NZ Content



## Added value

With the CCH Business Fitness NZ content solution, there's no reason you can't offer new services, or augment and unbundle existing services. Here are a few services and product offerings made easy with our procedures.

Many of these services are designed to be administered by an administrator or client services and overseen by the client manager.

## Suites & Kits

### Company Administration Service

This very in-depth content suite covers most company administration tasks, from company setup through to cessation of company. You can find all of your minutes attached to the relevant sub-procedures.

This procedure suite focusses on undertaking as many tasks as possible online.

### Trust Administration Service

This content suite houses all of your minutes attached to the relevant sub-procedures.

You can take one of two paths: Risk reviewing existing trusts or setting up new trusts. This then flows through to annual administration.

### Employer Documentation Kit

The Employer Documentation Kit is a self-contained package you sell to your clients. It contains over 40 documents designed to bring them in line with the legislation introduced as of 1 April 2011.

Easy to compile and market, this kit can be sold to as many of your clients as you see fit.

### ACC Administration & Advisory Service

This five-part content suite covers how to offer a robust ACC service, from registering for ACC Online Services, through to managing client claims & levies.

### FAQs

CCH Business Fitness NZ FAQs are designed to help your accounting team with common client queries.

These FAQs aim to:

- Help clients on-the-spot, with accurate information
- Reduce senior-level involvement
- Facilitate up-selling and reduce the 'charging for a phone call' type of fee queries
- Increase team member knowledge

All FAQs come with a script and report. Popular topics include Entertainment Expenses, Minimum Wage Rates and KiwiSaver.

### Coaching Library

Our coaching library is chock-full of reports, guides, checklists and additional tools to help advise clients at a business advisory level.

Reports and guides are written in layman's terms without accounting speak or 'dumbing down' the subject material.

Subjects include starting in business, technology, customer service, HR and KPIs.

### Newsletter Service

In your CCH Business Fitness NZ knowledge base you can find two newsletters which are only 10 minutes away from being ready for clients.

Wilco is your compliance newsletter. This is highly topical, date sensitive and is released as a four-page quarterly newsletter, with two-page special editions released as required.

Business Forward is your business advisory newsletter which is released every two months.

The only preparation these newsletters need is to add your firm logo and details. Or you can customise as much as you see fit.

We record free webcasts on using Wilco.

# CCH<sup>®</sup> Business Fitness NZ Hot Content

Depending on what's going on in your world, some items of content will always be 'hotter' than others.

So here's what's on the temperature gauge right now...

## **Provisional Tax Calculator**

This tool will help you streamline your provisional tax process in a time-efficient way, and includes the ability to estimate profit for the year in case they need to pay extra. No more surprise bills and UOMI!

## **Use of Money Interest Calculator**

Speaking of UOMI, this calculator will help you accurately estimate your clients' exposure to use of money interest and late payment penalties, when paying prov tax or through IRD reassessment. Watch this space...

## **Rates & Thresholds**

A quick-reference document listing all your most commonly used rates and thresholds.

## **Tax Management**

This procedure outlines how to print 901 tax letter reminders for provisional and terminal tax. Update tax management after each tax due date.

## **Tax Refunds**

The process for sending refunds to clients, ensuring fee deductions follow ethical guidelines.

## **Tax Debt Management**

Comprehensive process for advising clients on handling tax debt. With detailed decision tree to assist you in compiling thorough tax relief applications to IRD.

## **Integrated Workpapers**

Our workpapers integrate not only with each other, but with MYOB AO, APS and other accounting systems. Reconcile data straight from your GL and post journals back into your practice management software.

## **Livestock Workpapers**

Got farming clients? These workpapers can also integrate with your GL and are farming-specific. Look up the Herd Scheme Values chart for a great graphic education tool for your clients.

## **Income Tax Returns**

Procedures to ensure income tax returns are completed accurately, with links to preparation checklists.

## **Loss Limitation Kit**

Use this comprehensive workbook to generate a client questionnaire, calculate owners' basis in your LTCs and prepare shareholder summaries.

## **Dividend Preparation**

This procedure links through to our Dividend Workpapers and ICA Reconciliation spreadsheet.

## **Working For Families Tax Credits Calculator**

Determine the correct calculation of your clients' tax credits.

MTG: Watch out for 'MTG' links. These refer to the CCH Master Tax Guide!



## Your Content

## Who are you?

Depending on your role, certain content may be more relevant to you than to your fellow team members.

This guide will help you remember key content, and you can note down things to explore later.

## Accounting Team

For a quick one-stop-shop, visit the [Workpapers & Calculators](#) section.

Processes to explore:

- Financial Statements
- Dividend Preparation
- Tax - Explore this entire section in depth
  - Income Tax
  - GST
  - FBT
  - Prov Tax
  - Tax Refunds
- Working for Families
- FAQs
- Interesting content:

[illegible]

Add Rates & Thresholds table to your favourites!

## Partners & Senior Managers

For high-level Business Development support, visit the Coaching Library.

Processes to explore:

- Engagements
- Tax - Explore this entire section in depth
  - Resolving Tax Debt
  - Tax Disputes
- Risk Review processes
- Employer Documentation Kit
- Business Needs Assessment
- Planning Days
- Valuations
- Client Screening
- Employment Process
- Strategic Planning Day
- Interesting content:

[illegible]



## Your Content

## Administration Team

Processes to explore:

- Company Administration suite
- Trust Administration
- ACC Administration & Advisory
- Dealing with Death
- Day-to-day - Great for risk management
  - Banking
  - Couriers
  - Telephone Answering
- Debtors
- Interesting content:

[illegible]

Subscribe to our YouTube channel

[www.youtube.com/businessfitnessnz](http://www.youtube.com/businessfitnessnz)

The Business Fitness channel contains helpful videos and tutorials.

Or go to [www.businessfitness.co.nz](http://www.businessfitness.co.nz)

To view full-length webcasts and webinars.

## Customer Service & Marketing

Processes to explore:

- New Clients process
  - Administration
  - Welcome Pack
  - Setup
- Contact
- Records Folders
- Wilco & Business Forward newsletters
- Seminars
- Interesting content:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## For Help With:

- Using the software, use the iFirm Online Learning Centre
- Finding or using our content, email [support@businessfitness.co.nz](mailto:support@businessfitness.co.nz) or phone 0800 10 58 60 or visit [www.businessfitness.co.nz](http://www.businessfitness.co.nz)

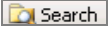
CCH® Business Fitness NZ

# Searching for Business Fitness Content Quick Guide

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## Introduction

This guide is designed to help you get the best results when searching for Business Fitness content in Acclipse Document Manager.

To access the search engine, on your Acclipse menu in Outlook, click  and use the Search Text field.

The search engine never turns off. You can minimise it and recall it from the bottom right of your task bar (next to the clock).

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## How Content is Structured and Named

When searching it helps to know how Business Fitness content is structured and named.

**Structure:** Content is procedure-driven. Procedures contain step-by-step instructions on how to perform a task and links to relevant tools. It's best to start from a procedure when you're looking for a related tool.

**Naming:** When we develop and name content we determine where it fits into a subject area or process (e.g. ACC) and what the related task and procedure is. Where a procedure fits within a wider group of procedures, we include the subject area or process (e.g. ACC) in the document title.

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## Search Parameters - Default Settings

Generally the most useful search parameters are the default settings: Title, Description, and Keywords.

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## Full Text Parameter - Gives the Greatest Range

To give yourself the greatest range of options, when you're searching for a keyword or concept that you know is within the text of a document, tick Full Text. You can then refine the search by using the filters.

This is great for finding knowledge base content. However, we recommend you don't do a Full Text search for common words (e.g. ACC) as it will produce too many results to be useful. Full Text is useful for more obscure words (e.g. Blackberry).

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## Document Types Filters

This is usually the most useful filter. From here you can select the types of document that you want to search for. For example, if you search for ACC using Procedure as the Document Type, the search will return ACC-related procedures. If you search for ACC using Letter as the document type then only ACC letters will return.

Unless you are already familiar with the procedure, it's best to start from the procedure and select the relevant tool, (e.g. letter, form, website, guide, etc) from there. This ensures tools are used in context.

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## Narrowing Down a Search

You'll get a better result if you think of the process or subject area first and search for a single keyword, then narrow it down by using the filters.

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## Using Multiple Document Types Filters

You can filter for multiple document types. For example, you can search for both Reports and Guides, or for both Procedures and Sub-Procedures.

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## Sub-Procedures

Sub-Procedures are found only in ACC, BankLink, Company Administration, Financial Statements and Trust Administration.

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## File Types Filters

You can filter for File Type if you know what you're looking for (e.g. Word document or Excel spreadsheet).

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## Category Filters

You can filter by category. However, we tend to use this least because you don't always know the category the document is in, and the search engine doesn't search through sub-categories.

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## Wildcards

\* (asterisk) is the wildcard search. It's useful as a short form of keyword, or when you're not sure about your keywords and want to capture a range of options.

Example searches:

- **refund\*** will find refund and refunds
- **minute\*** will find minute and minutes
- **trust\*** will find trust and trusts

You can also use \* at the front of a word.

You can use \* in combination with other relevant filters (e.g. search for **ACC Cover\*** with Document Type Procedure).

You can use \* on more than one keyword (e.g. **elec\* work\***)

**Note:** Don't put a space between the word and \*

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## Quote Marks

You can use quote marks when you're looking for an exact phrase or combination of words.

This will find the words in the exact sequence you have between the quote marks. You can use these in combination with wildcards and other filters.

For example, **"ACC Cover"**

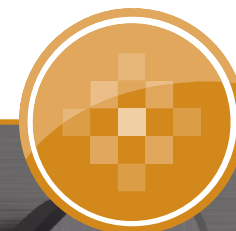
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## For Help With:

- Using the software, use your 'Acclipse Document Manager User Guide'
  - Finding or using our content, email [support@businessfitness.co.nz](mailto:support@businessfitness.co.nz) or phone 0800 10 58 60
- Or visit [www.businessfitness.co.nz](http://www.businessfitness.co.nz)
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# CCH® Business Fitness NZ FAQs

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- Reduce senior-level involvement
- Facilitate up-selling and reduce the 'charging for a phone call' type of fee queries
- Increase team member knowledge

## All FAQs come with a script and report. Here's a list of topics and their linked tools...

- |   |  |   |                                     |
|---|--|---|-------------------------------------|
| • ACC and Claims                            |  | • Parental Leave - Employers                  |                                     |
| • ACC Levies and How They Work              |  | • Parental Leave - Self-Employed              |                                     |
| • Audit                                     |  | • Partnerships and Allocating Profits         |                                     |
| • Balance Dates – Changing                  | (links to procedure & report)          | • PAYE Intermediary Subsidy                   |                                     |
| • Balance Dates – Options                   |  | • Payments to Spouses                         | (links to letter)                   |
| • Balance Dates for Kiwifruit Orchardists   |  | • Personal Property Security Act              |                                     |
| • Business Interest and RWT                 |  | • PPSR Discharge                              | (links to report & letter)          |
| • Business Structures – Changing            | (links to reports)                     | • Provisional Tax                             |                                     |
| • Business Structures – Options             |  | • Public Holidays and Closedown Periods       |                                     |
| • Client Gift Expenses                      |  | • QCs and LTCs                                | (links to guide)                    |
| • Employee Accommodation Expenses           |  | • Reimbursing Allowances                      |                                     |
| • Employee Versus Independent Contractor    |  | • Rental Properties - Structures and Expenses | (links to deductibility table)      |
| • Employment Relations and Holidays Act     | (links to checklists & forms)          | • Shareholder Remuneration                    | (links to procedure)                |
| • Entertainment Expenses                    | (links to expenses table)              | • Sponsorship Expenses                        |                                     |
| • FBT and Company Vehicles                  | (links to letter)                      | • Stocktake                                   | (links to form, letter & checklist) |
| • Fines                                     |  | • Student Allowances and Loans                |                                     |
| • Foreign Investment Fund                   |  | • Tax Debt                                    | (links to procedure)                |
| • Foreign Superannuation Tax Rules          |  | • Terms of Trade                              | (links to examples & form)          |
| • GST and Commission Based Insurance Agents |  | • Travel Allowances                           |                                     |
| • GST Ratio Option                          |  | • Travel Expenses                             |                                     |
| • Home Office Expenses                      |  | • Trust Administration and Legal Costs        |                                     |
| • IRD Tax Disputes                          |  | • Use of Money Interest                       |                                     |
| • KiwiSaver                                 | (links to letters & forms)             | • Vehicles – Lease or Buy                     | (links to calculator)               |
| • Livestock Valuation Methods               | (links to letter & report)             | • Wage Subsidies                              |                                     |
| • Minimum Wage Rates                        |  | • Working for Families                        |                                     |
| • Mixed Use Assets                          | (links to calendar & expense tracking) |   |                                     |