

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[®] 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:**

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 104

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:

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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:**

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 104

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www.youtube.com/businessfitnessnz

The Business Fitness channel contains helpful videos and tutorials.

Or go to 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:

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For Help With:

- Using the software, use the iFirm Online Learning Centre
- Finding or using our content, email support@businessfitness.co.nz or phone 0800 10 58 60 or visit www.businessfitness.co.nz

CCH® Business Fitness NZ

Searching for Business Fitness Content Quick Guide

Introduction

This guide is designed to help you get the best results when searching for Business Fitness content in iFirm Intranet

To access the search engine simply navigate to your Intranet home page and type into the **Search** field.

If you don't know exactly what you're looking for, it may be more helpful to browse to a procedure from the Content Hub page.

Unless you are already familiar with the tools, 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.

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.

Using 'Tag' to filter

This is usually the most useful filter.

When you begin searching, start by typing the type of document you are looking for, e.g. 'letter' and selecting the tag which appears. Then add a keyword.

From here you can select the type of document that you want to search for. For example, if you search for ACC using Procedure as the Tag, the search will return ACC-related Tag type then only ACC letters will return.

ONE TAG : ONE KEYWORD

For Help With:

- Using the software, use the iFirm Online Learning Centre
- Finding or using our content, email support@businessfitness.co.nz or phone 0800 10 58 60 or visit www.businessfitness.co.nz

Useful Tags

Articles	Article on a given topic
Checklists	List with check boxes
Examples	Example
Forms	Has spaces to fill in information, may be a paper form, a minute or a calculator
Guides/Manuals	Wordy document used to inform a team member
Letters	Letter to a client or third party
Policies	E.g. email policy or dress code
Presentations	PowerPoints
Procedures	Step by step processes with links to tools and templates
Reports	Wordy document used to inform a client
Scripts	Document to help you speak to client
Sub-Procedure	Step by step processes with links to tools and templates, linked from larger procedures e.g. Company Admin

Don't forget you can use your Content Tags too! Search only Excel Spreadsheets or PowerPoint presentations.

Partial Searches

iFirm uses a partial word 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, refunded, refunding and refunds
- **minute** will find minute and minutes
- **trust** will find trust and trusts

You can use a partial words search in combination with other relevant filters (e.g. search for **ACC Cover** with Tag **Procedure**).

Multiple words

Be aware when using multiple words, that iFirm will only find them in the exact sequence you use. E.g. 'GST Refund' will find 'GST Refund Letter' but not 'GST - Large Refund to IRD'.

So stick to the golden rule:

ONE TAG : ONE KEYWORD

CCH® Business Fitness NZ





CCH® Business Fitness NZ 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. 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) | | |