Tax & Accounting

3 Steps to Achieve a Successful Software Implementation

Expert consultants ensure a pain-free switch to CCH Axcess™ Tax

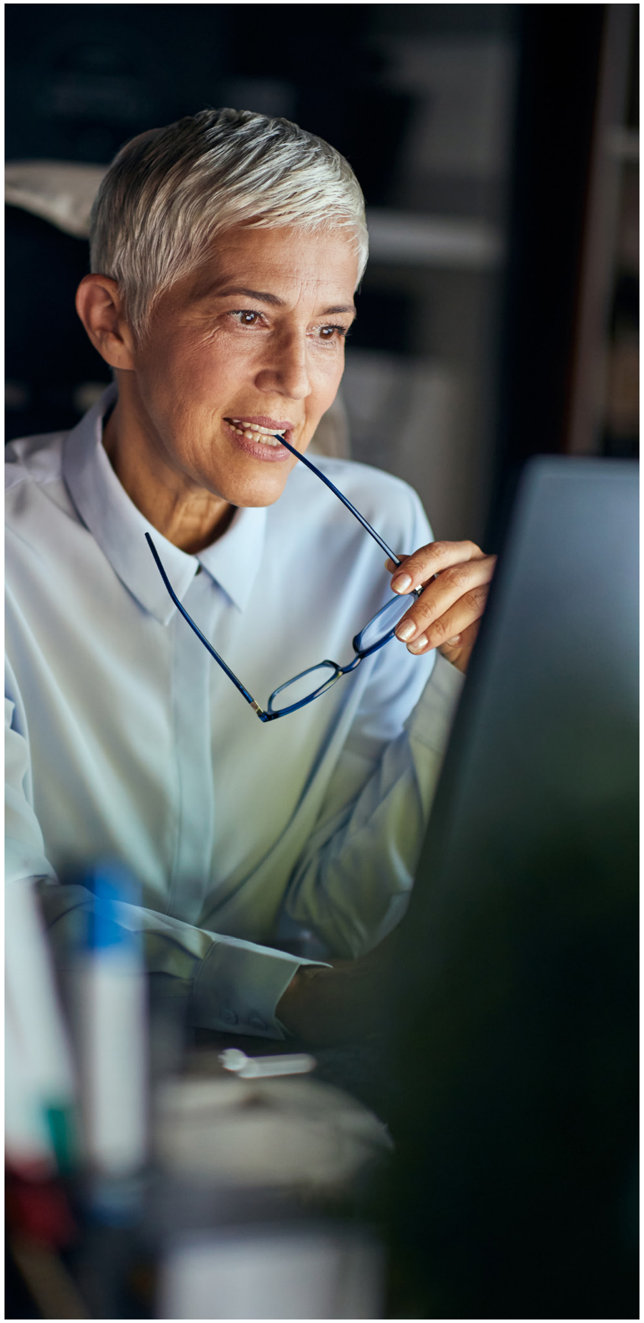
Wolters Kluwer

We take the hassle out of transitioning to new tax software

Taking on a significant technology transition can feel daunting, and we know switching tax software can be a hassle. But we have a team of experts to make the process as painless as possible. Our implementation consultants have helped thousands of firms switch to CCH Axcess Tax by focusing on three essential steps to a successful launch:

1. Planning and Implementation
2. Consulting
3. Post-Implementation Support

Here's how they can help you too.



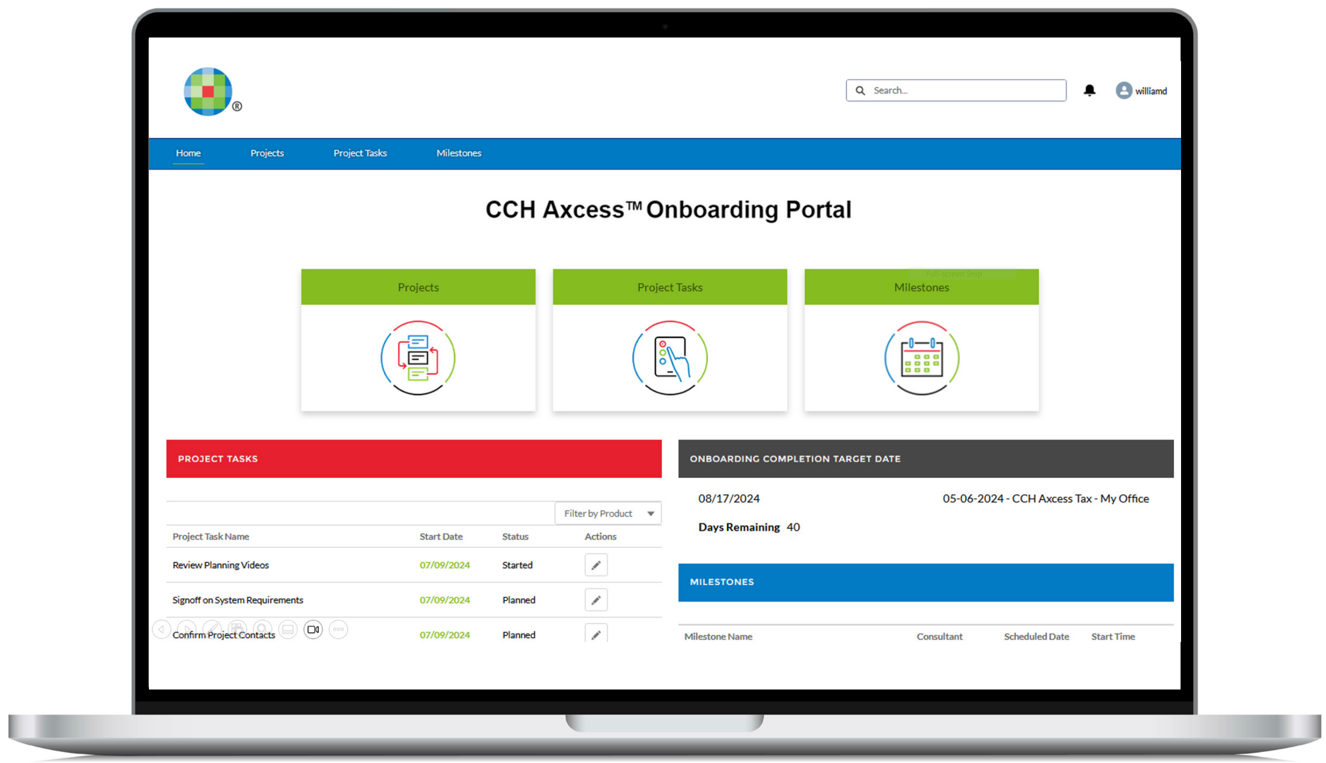
Step 1: Planning and Implementation

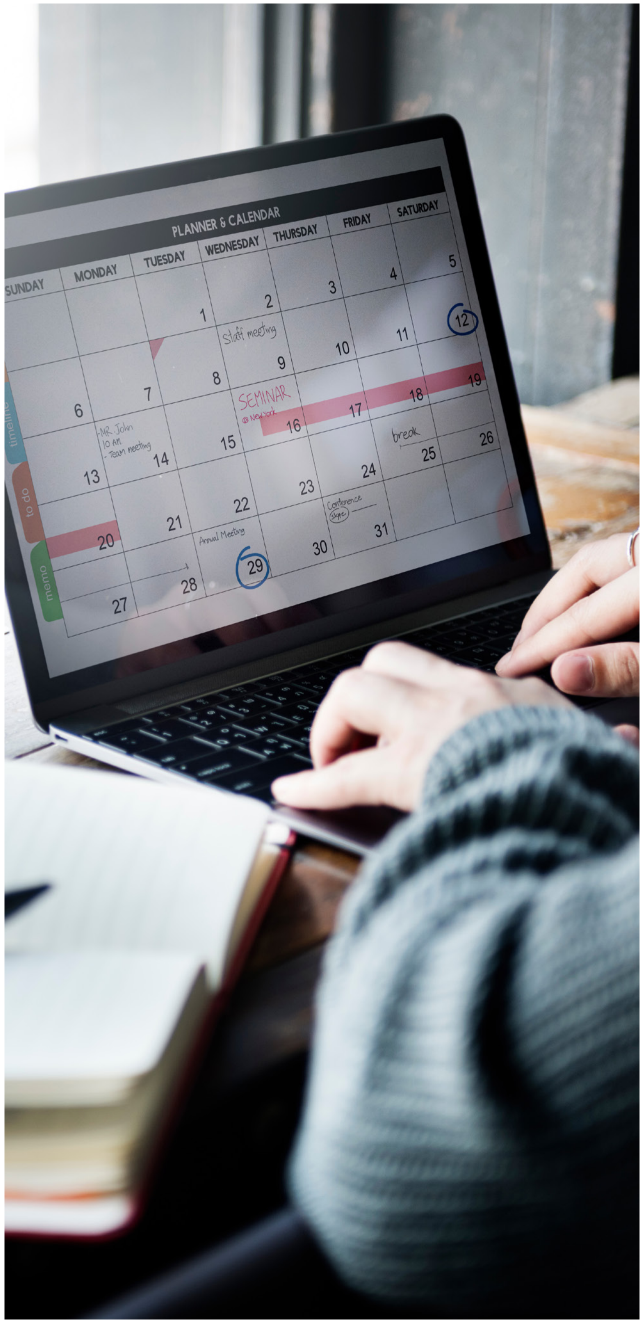
Our consultative implementation process helps ensure firms get up and running with their new software as quickly as possible. Our expert implementation consultants are dedicated to reducing the challenges often associated with onboarding a new software platform.

The team has 10 years of experience helping firms of all sizes move to the CCH Axcess™ platform. And they're not just adept at dealing with the technical implementation. They also have data analytic and project management experience to skillfully complete your transition, so you feel confident and ready to maximize your new tools. Our focus is on making you successful in the new software so you can quickly realize the benefits of your investment.

Never miss an important date

The new on-demand Onboarding Portal is integrated directly with our project management team using Salesforce.com. You'll have direct access to all of your project statuses, all the associated tasks, timelines, milestones and consulting materials. Using the Onboarding Portal, your Champions Team will be able to complete tasks and add meetings to Outlook whenever they need to.





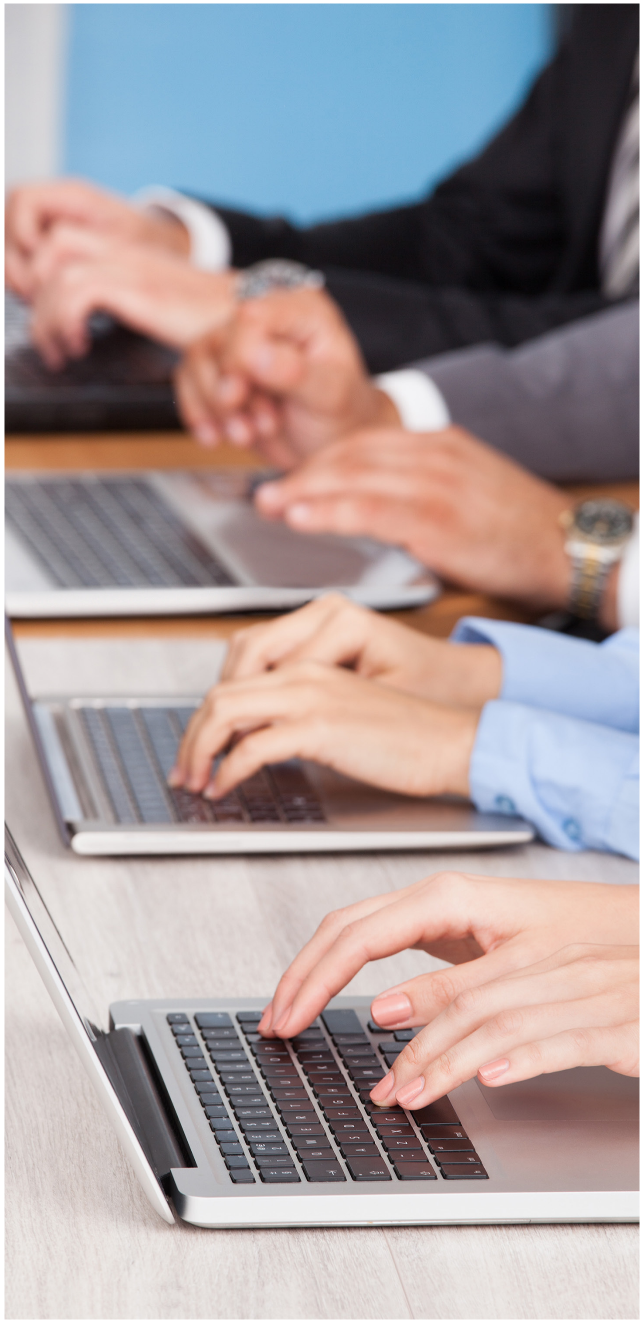
When

Plan the timing of your implementation

Our experienced scheduling coordinators will help your firm choose the ideal time for implementation based on your schedule and resources. To get you off to the best start using CCH Axcess Tax, we offer:

- Flexible start dates and times
- A milestone-based project approach
- Convenient self-service resources
- A coordinated service delivery model

Smart scheduling. Most firms have similar busy seasons and training is first come, first served, so plan your implementation accordingly. Slow-season slots fill up fast!



Who

Form a Champions Team

Your implementation will be most successful when supported by a Champions Team (CT) within your firm who will lead the implementation of the software and the transition to the new environment. This is a group of influential people on your staff who will work with the Wolters Kluwer consultants throughout implementation. Members of the CT should be selected so that every major service area within the firm is represented in best practices discussions.

Select a "sponsor." Designate one person as the project's "sponsor" — typically a manager or partner who is responsible for the project in every way, ensuring goals are met, leading all CT meetings, and championing the project throughout the firm.

This team will be responsible for:

- Facilitating change management
- Creating and maintaining the firm's best practices
- Supporting tax workflow
- Ensuring proper training for employees
- Keeping management and staff informed of any workflow changes resulting from new software implementation
- Supporting end-users
- Staying current on new standards and software enhancements and updates
- Conducting regular evaluations of established processes

Champion Team roles and responsibilities
Here's what Champion Team member roles look like based on their respective positions in the firm. In smaller firms, one or two people may represent multiple roles.

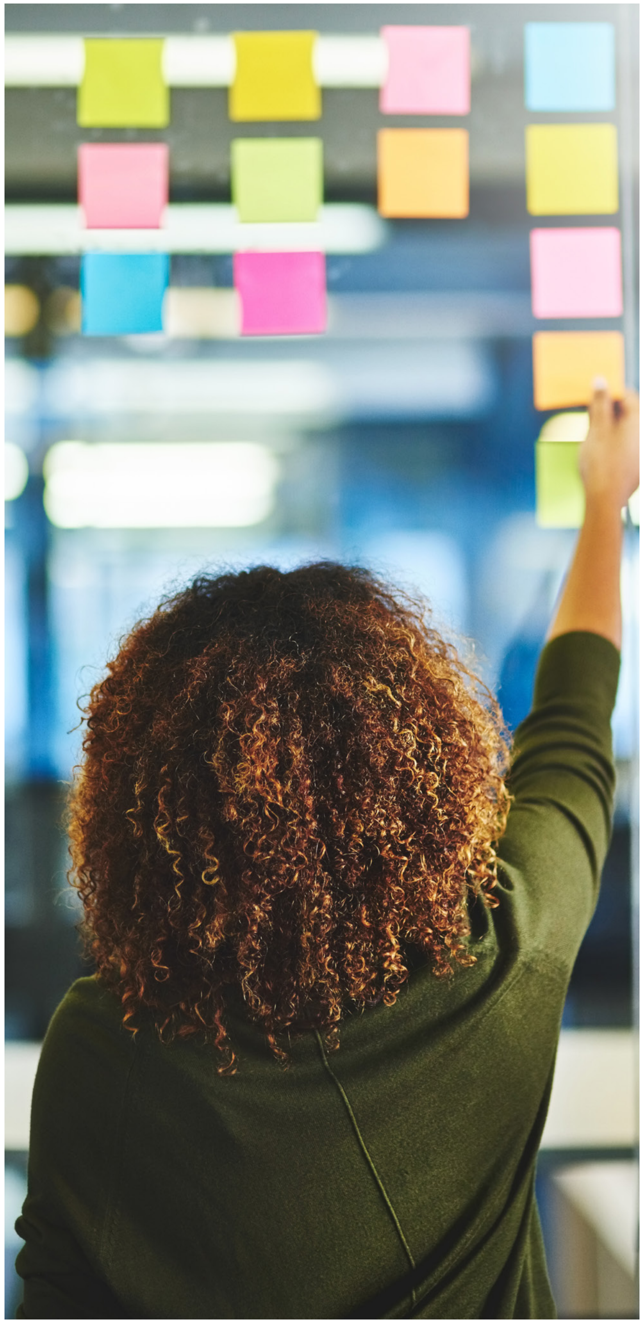
- **Partners:** Partners provide support for and a commitment to the new software and environment, which should be communicated to both employees and clients. Absolute support and commitment from top leadership is crucial for a successful implementation and ongoing use.

- **Managers:** Managers must have a good understanding of the firm's current workflow and processes so they can provide guidance to other firm personnel on policies and procedures necessary in the new environment.

- **Staff/Seniors:** Staff and senior associates on the Champions Team demonstrate strong accounting and computer skills, as well as a commitment to teamwork. They understand policies and procedures that affect their jobs and often offer a fresh perspective on those processes.

- **IT Representative:** The involvement of the IT department, if there is one, is crucial to the installation, support, and development of firm procedures for the new software. They also assist in addressing any hardware or software issues and in coordinating necessary software and hardware upgrades.

- **Administrators**: Administrative or support staff must understand how their processes are affected and offer suggestions for how the new software can improve or streamline them.



How

The implementation process

You've scheduled a date and put a Champions Team in place. Now it's time for our consultants to ensure a smooth implementation of CCH Axcess Tax by guiding you through these four phases:

Phase 1

Preparation phase

During this first phase of implementation, your consultant will review milestones and schedules and determine the right staff members to attend each meeting. They also will review the technical considerations for CCH Axcess including:

- System requirements
- Bandwidth testing
- Firewall settings
- Antivirus exceptions
- Third-party hosting

Additional topics to discuss could include:

- Client data import
- Staff data import
- Mergers and acquisitions
- Firm splits
- Data validation to check for invalid and duplicate data as well as missing information
- Conversions (Learn more on page 10.)
- Migrations

Phase 2

Installation phase

During a video conference meeting from a workstation at your firm that you've prepared for initial installation of CCH Axcess, your implementation consultant will guide you through the steps to install CCH Axcess Tax. You'll learn how to use the Install and Update Manager to complete installation of modules on other workstations in your firm. You'll log in and the consultant will walk you through:

- Smart Client application features
- CCH Axcess™ Dashboard
- CCH Axcess Tax interface
- Installation and Update Manager
- Global and product-specific settings and user rights

Phase 3

Configuration phase

Once you have CCH Axcess installed, our consultant will review the common area configuration, which includes:

- Firm configuration
- Client creation and updating
- Staff creation and updating
- Security, including permissions, access groups, and product licensing

Phase 4

Readiness phase

You're almost ready to start leveraging CCH Axcess Tax. The final phase of implementation begins after installation and configuration and ends 30 days after end-user training. During this time, we are here to help you:

- Complete software transition
- Quickly address questions
- Gain familiarity with self-service resources
- Register for Software News

Plan your data conversion

An important part of the planning and implementation process is deciding if you want to import your existing data. If you do, we offer multiple tools to import and convert it so you can access it through CCH Axcess Tax. Data conversion is simple and can be done on-demand with our self-serve interface via one of two methods:

- **Pro Forma/Roll-Forward Conversion** is designed for completed returns to be converted, rolled forward, and prepared in the next tax year. The types of returns converted will vary depending on the software your firm is converting from.

- **Extension Conversion** is designed for returns in progress in your original tax software. Types of returns converted using this method will vary depending on the software the firm is converting from. This conversion method is not available for Drake Tax® and TaxWise®.

Tax software that converts to CCH Axcess Tax

Automated extraction of customer tax data from other software vendors to the CCH Axcess platform via our self-service portal is supported for:

- UltraTax CS®
- TurboTax®
- TaxWise®
- ProSeries®
- Lacerte®
- GoSystem®
- Drake®
- ATX™

There is NO additional cost for tax conversion — and there's no limit to the number of returns or submissions.

Data That Converts

- Federal tax data
- Detail creating most primary tax forms and schedules, including depreciation (fixed assets)
- Conversion Detail documents are available for each competitor

Not Converted

- State data (some exceptions)
- E-File details
- Non-tax data, such as customer correspondence, administrative details, and preparer and signer information

What

The data conversion process

Conversions are self-service via our easy-to-use online interface, and do not require scheduling. There are five steps to the submission process:

1. Enter firm name and contact information
2. Select product converting to
3. Select software converting from and available options
4. Attach prepared returns and indicate return types being converted
5. Final review of submission information — last chance to make changes before submission

Xpitax Premium Conversion Services
For enhanced, full-service conversion, our highly trained Xpitax team can fully convert federal and state data and complete other post-conversion work, ensuring data is converted accurately with minimal effort from your team.

What happens next?
Once your data has been received, we will send you an email letting you know we have received your submission. We'll run the submission through a basic verification process to ensure the return files we received are usable for conversion. If not, we will contact you immediately with additional information outlining the issue. If they are usable, the submission will move through the processing queue. Once conversions are complete, you will receive an email with additional information and instructions. You can check the status of your submissions any time via the "your submissions" section of the website. Once converted returns have been downloaded, they can be imported via the Conversion Import Utility in CCH Axcess Tax.

When

Conversion timing considerations

Deciding when to convert your tax return files will depend on your firm's unique needs. We generally recommend that you complete returns in your existing software then leverage the pro forma conversion method to start fresh in CCH Axcess Tax.

No scheduling necessary. With our self-service model, your firm decides when you're ready to submit returns for conversion.

Step 2: Consulting

Purchasing new software is a major investment for most firms. Proper training and consulting are critically important to maximize your return on investment and realize the benefits of your new solution. We offer flexible training options to suit the individual needs of your firm.

When

Schedule your training sessions

A scheduling coordinator will guide you through scheduling your sessions, including the sequence and time frame between sessions. During the initial scheduling call, you will discuss each session, including booking the dates and who should attend. Remember, training is most effective if your staff can start using the software immediately after completing training, so make sure implementation is complete before you begin training.

After the call, the scheduling coordinator will email you a confirmation with your schedule, including the session materials, which you should download prior to each session.

Sessions are scheduled on a first come, first served basis, so schedule your sessions as soon as possible to reserve your preferred dates. Keep in mind that most firms have similar busy seasons, so training during off-seasons is in high demand.

Who

Determine which staff members need which training

Your staff members will interact with CCH Axcess Tax in different ways based on their roles within the firm, so their training should reflect those needs.

As you think about staff training, we suggest that each group participate in the following sessions:

Champions Team Members: Setup/ Best Practices

- Setting up tax defaults and configurations
- Defining tax best practices

Administrative Staff: Administration & E-filing

- Intro to correspondence manager
- Correspondence manager workshop
- Intro to My1040Data
- Return management
- Organizers
- Roll forward
- Electronic filing

All Tax Staff: End User/Intro to Tax

- Intro to Individual Tax
- Intro to Partnership Tax
- Intro to Corporate Tax

How

Choose a training delivery method

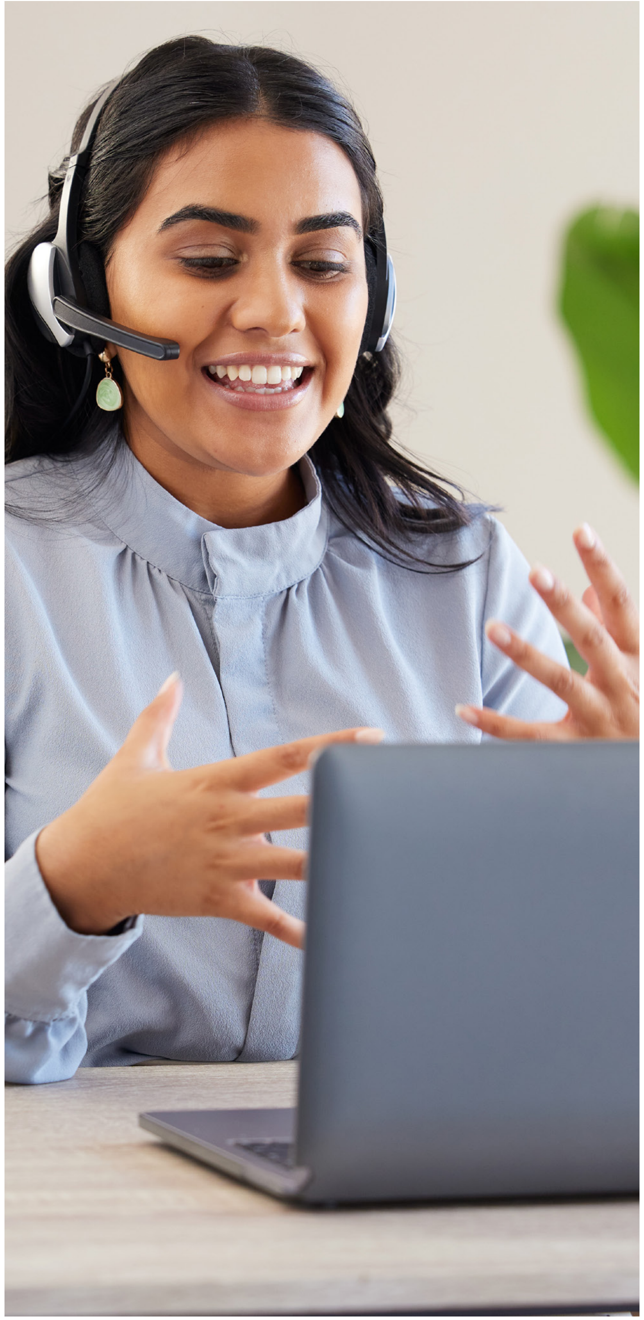
Wolters Kluwer offers a variety of course delivery methods to fit your firm's specific needs and budget, including these four options:

- **One-on-one on-site training** works well for firms that prefer in-person training. A training consultant will come to your office to work in-person with your staff. Each session accommodates a maximum of 15 people and requires a minimum of two consecutive days. Travel costs for the consultant are billed to your firm.

- **One-on-one web training** allows staff to interact with a consultant in real time. The consultant is live in a web meeting room with up to 15 members of your staff. This ensures the consultant is focused on your office and your specific questions. This option provides the best value if you need four or more people trained in the course.

- **Webinars** host you and other offices together in a live, consultant-led course. This training option is billed per-person and allows you to interact with other firms that may share similar challenges or questions about the software.

- **eLearning** opportunities include flexible and convenient self-paced online training that uses audio and video to present course material. For best retention, we recommend that staff members complete each course in one sitting as if they were attending a live session. Course access lasts for one year so you can review the material repeatedly.



Step 3: Post-Implementation Support

Our flexible, convenient, and comprehensive training options will ensure your staff feels confident and competent starting to use CCH Axcess Tax. But what if they have more questions? CCH® Support options have you covered with answers to all your questions.

Support site

- Find answers to all sorts of questions in our comprehensive knowledge base, video library, and user community discussion groups, or by asking the Chat Bot.
- Access self-service account management tools to view and pay your invoices, view inventory and payment history, and even renew your software on demand.
- Contact support in your preferred format, whether that's asking a question in live chat, opening a support ticket, or contacting us by phone or mail.
- Ask and answer questions with your peers in our online community. This forum covers a variety of topics including best practices, tax forms and features.

CCH Tax Insiders program

Tax season readiness is important, and we have a number of initiatives designed to ensure you have access to the latest news and expert insights.

- Tax Talks Live is a series of webinars focused on providing CCH Axcess Tax and CCH® ProSystem *fx*® Tax customers with current news, tips and tricks, best practices, and other valuable information to help them succeed.
- Professional & Client Services office hours are dedicated support webinars exclusively for CCH ProSystem *fx* Tax and CCH Axcess Tax customers.
- Our Tax Validation Program gives firms a chance to provide input and feedback through surveys, focus groups, contextual inquiry interviews, and early adopter opportunities such as beta testing opportunities.

New! You can chat with the advanced chatbot and access the Forms Release Status Page without even leaving the software.

Now you know the who, what, when, and how of a successful CCH Axcess Tax implementation. Switching tax software can be a hassle at the best of times, but with the right tools and training, you'll be glad that you invested the time and money in upgrading your technology. And you won't go it alone. We have a team of consultative experts at your service to make the process as painless as possible so your firm can get up and running with your new software as quickly as possible. We also offer easy-to-used self-service interfaces that allow you to tackle implementation tasks, such as data conversion, at your own pace. Add to that our flexible training options and post-implementation support, and the only question you'll have is why you didn't make the switch sooner!

Visit **EngageTax.WoltersKluwer.com/CCHAxcess** for more information.

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