CCH ACCOUNTANTS' SUITE
INTEGRATED. | INTELLIGENT.

CCH R&D Pro

Every atom counts.

Maximize your clients' SR&ED tax credits with technical precision.

CCH
a Wolters Kluwer business

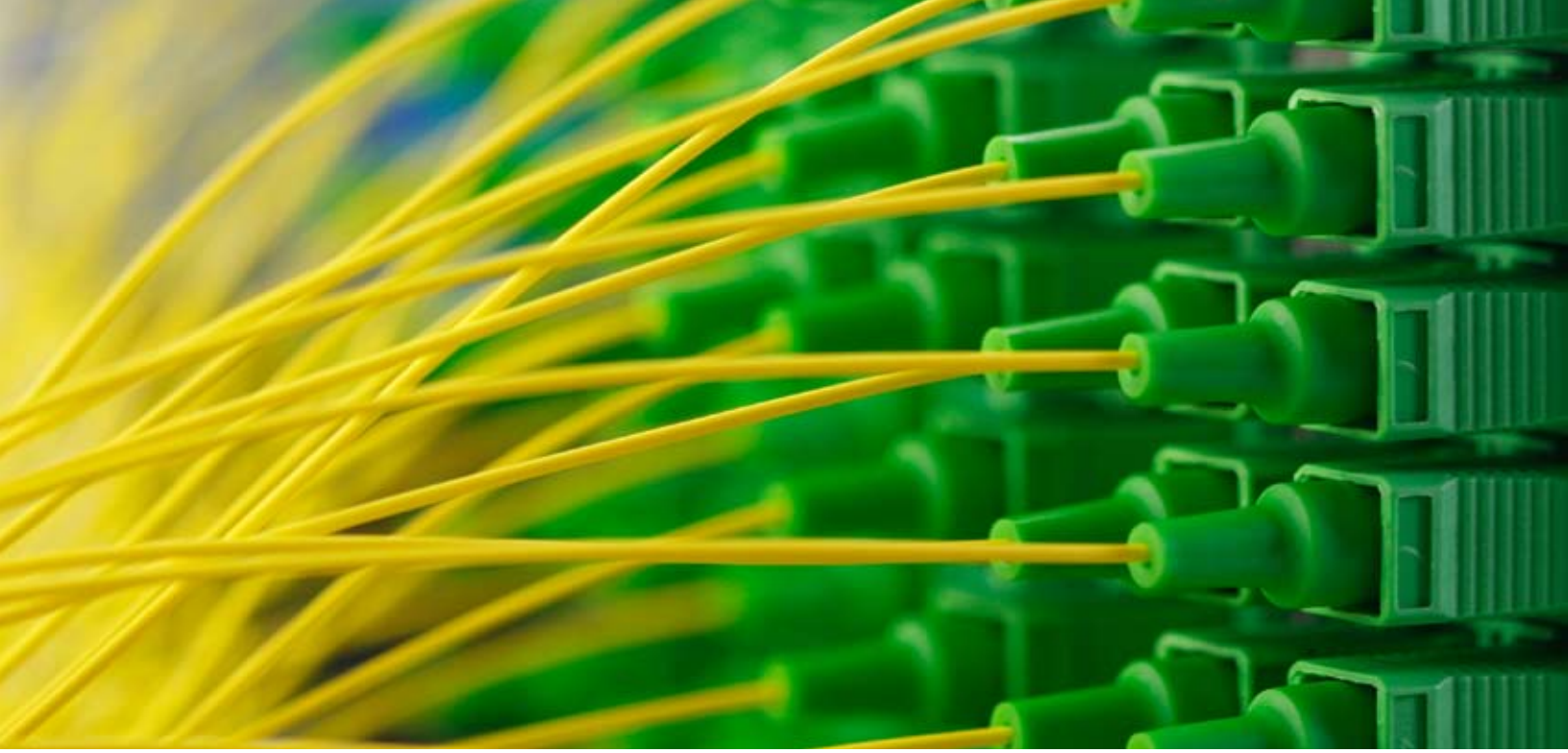
In your highly specialized field, detailed knowledge of the SR&ED eligibility rules and the documentation required to maximize your client's tax advantage is a must. Every detail counts in this complex and continually evolving tax credit program. From the first expense to the last timesheet, you can count on the expertise of CCH Canadian to administer all your clients' SR&ED projects and make certain the solution you provide is flawless.

CCH Canadian is the experts' expert when it comes to tax research and accounting products — trusted by the CRA, Department of Finance and all of Canada's top 30 accounting firms.

CCH R&D Pro brings the complex SR&ED claim process down to size.

Introducing the new web-based software solution that enables you to easily track, manage, calculate and file your clients' SR&ED investment tax credits. Comprehensive and highly intuitive, *CCH R&D Pro* facilitates management of the entire SR&ED claims process for multiple clients, and accelerates the processing time.

- designed by SR&ED experts exclusively for tax professionals and management consultants to help you administer your client's SR&ED projects
- systematically captures technical, financial and tax information from project inception through to completion
- simplifies the process of generating the documentation required to file SR&ED investment tax credits
- eliminates obstacles associated with claiming credits
- fully integrates with your Corporate Taxprep® software
- ideal for multi-location projects and teams
- proven to accelerate processing times and improve your profitability



Streamline and accelerate the SR&ED claims process with real-time accuracy and maximum efficiency.

Plan on it

SR&ED investment tax credits can have a significant impact on your client's bottom line and tax planning. With ***CCH R&D Pro*** you will know where things stand at any stage in the process. Imagine being able to make reserves based on credits to be received, plan research budgets and optimize tax credits by collating data from the moment the project is launched.

CCH R&D Pro allows for real-time reporting on potential tax credits. View reports project by project, by fiscal year, or rolled up to show and compare the overall results of your client's R&D.

Simplify it

CCH R&D Pro makes it easy to capture all types of eligible expenses, and automatically structures and documents projects in accordance with CRA requirements. You can select your preferred calculation method for expenses, confident that the appropriate tax forms are completed and investment tax credits are calculated correctly. Expenses include salaries and wages, materials, SR&ED contracts, lease costs of equipment, overhead, third-party payments and capital expenditures.

CCH R&D Pro provides centralized data storage. Organized and accessible, it's structured to capture technical information systematically – from multiple sources. It also stores the many documents needed to prove your research was conducted correctly. They become the supporting materials for the proper filing of the T661.

CCH R&D Pro has many other timesaving features. For example, CRA has a strict limit on the number of characters you can enter into Section B of the T661 Part 2. After importing your answers directly into the schedule, ***CCH R&D Pro*** also provides a word count and built-in editing tool. So you can "make it fit" before you import the data into your accounting software.

CCH offers extensive help and support, including video tutorials built right into the software.

For example, if you have a question about functionality in the *Project Monitoring* section, simply click on the question mark icon beside the title, and view a video tutorial. This user-friendly feature is indispensable to get instant information at your fingertips. The software also provides all users access to the tutorials, thereby enabling your clients to complete their documentation accurately and efficiently.

You also have access to our toll-free technical support hotline, with the fastest response time in the industry. We make it our business to support yours – in English or French, from coast to coast.

Get the whole team in on it

CCH R&D Pro's web-based software allows cross-functional and multi-location teams to work within a secure, central repository to maintain complete and accurate records for SR&ED reporting. Team members can input, review, consult or edit data from any location with an Internet connection.

A Client Management Module lets you manage multiple clients simultaneously, with each contributor able to input documentation of expenses and activities in real time. All users must register with their own password-protected account, restricting their access to their own data. You control and monitor the process, drilling down on project details when required.

A secure-socket layer ensures extra protection of your data, which is hosted at a high-compliance data centre in Canada.

Link it to your tax software

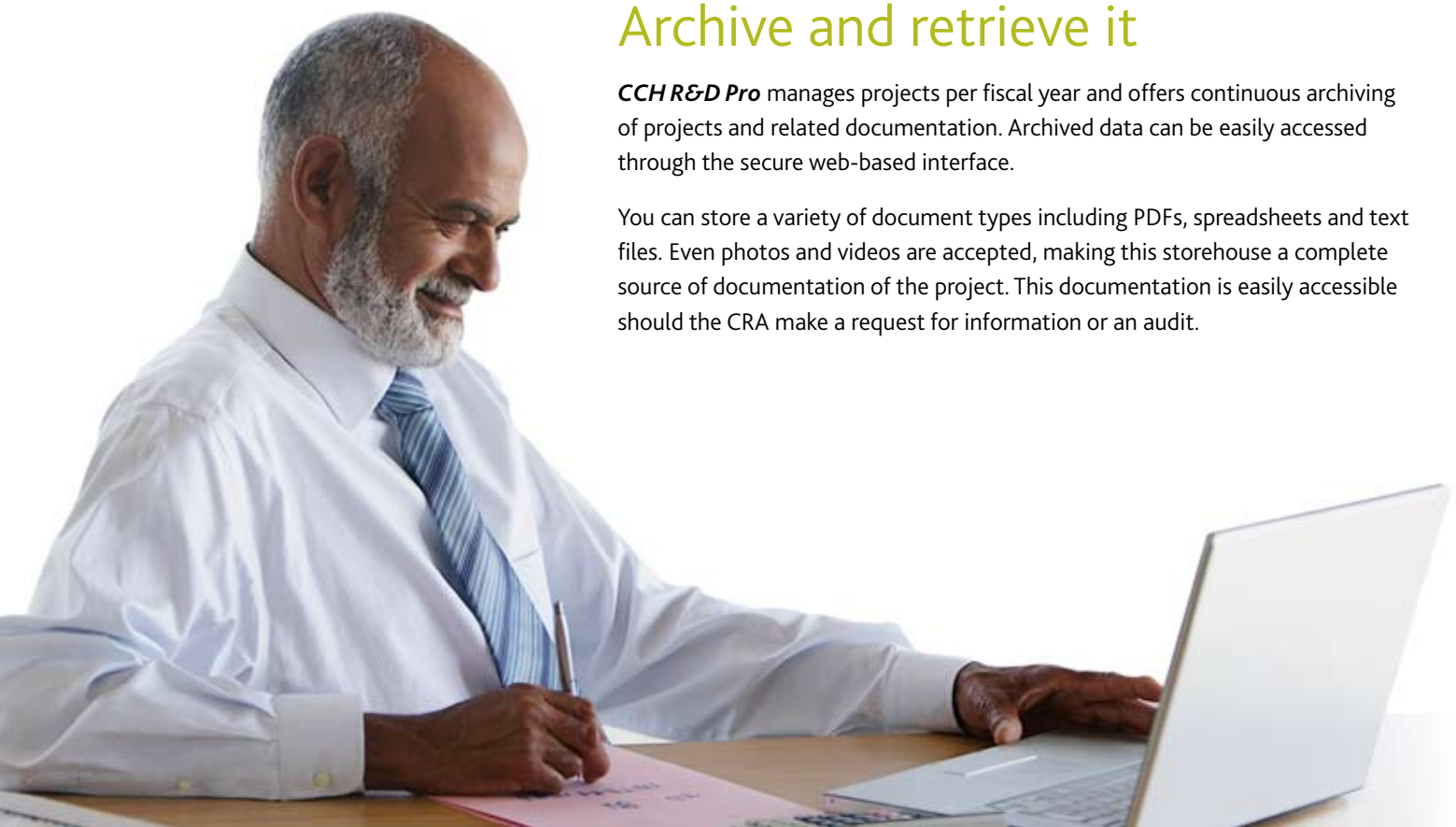
CCH R&D Pro fully integrates with your CCH Corporate Taxprep software, transferring the required information directly to your T661 tax forms and related schedules, saving you time and reducing the risk of errors.

Detailed financial and technical reports to be enclosed with the corporate (T2) tax return are automatically updated as data are collated.

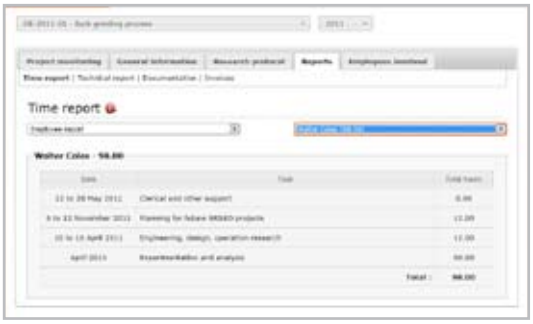
Archive and retrieve it

CCH R&D Pro manages projects per fiscal year and offers continuous archiving of projects and related documentation. Archived data can be easily accessed through the secure web-based interface.

You can store a variety of document types including PDFs, spreadsheets and text files. Even photos and videos are accepted, making this storehouse a complete source of documentation of the project. This documentation is easily accessible should the CRA make a request for information or an audit.



Easily input data for a project from inception to conclusion. Capture personnel data, hours worked, technical information, invoices and other documents required by CRA.



Real-time reporting allows your clients to input expenses from any locaton with an Internet connection.

Integrates with Corporate Taxprep to facilitate the filing of T661 schedules with reduced risk of data errors.

CCH R&D Pro ensures all the right documentation is readily available and easily archived, managed and exported.

- web-based platform enables real-time collection of data from numerous sources and different locations
- the Client Management Module allows you to manage data for multiple clients through a single repository – clients can upload documentation of expenses and activities related to their projects in real time, while access permissions ensure each client sees only their own data
- monitor project status and tax credit progression during the life cycle of the project
- obtain summarized R&D project descriptions from the correct source in the format prescribed by the CRA
- ensure up-to-date accuracy with regular CRA updates
- expedite the audit process by having all project details available in a central database, with prior years archived and easily accessible
- manage SR&ED tax schedules with clients who use another tool to gather and record expenses and activities
- conveniently manage the receipt of data by multiple preparers
- export pertinent information for preparation of SR&ED tax schedules

Discover the advantages for yourself with a complimentary 14-day full version trial:
connect.cch.ca/LP=65

CCH R&D Pro

Maximize your clients' R&D investment with the new web-based software solution that enables you to easily track, manage, calculate and file SR&ED tax credits.

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Contact your CCH Account Manager at **1.800.268.4522** for more information.

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From the company accounting professionals trust most.

CCH is the world's largest provider of professional tax and accounting software, delivering the most advanced tools, research and training to thousands of organizations, including the CRA and the federal Ministry of Finance.

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