OVERVIEW

XCM integration with CCH Practice Management requires an evaluation of a firm's current CCH Practice Management configuration and is eligible to firms that fit a strict set of criteria.

This document will instruct firms on the following integration information:

- The information relevant to the integration

- How to collect and provide this information for a quick evaluation

- Approval or postponement for moving forward

Time capture is used in XCM to provide greater visibility for resource and budget management purposes in the following ways:

- Automated Tax Scheduling – the Resource Allocation Scheduling module takes into account both budgeted and actual hours in determining which staff members are available to take on additional work.

- Budget Management – XCM's Control Sheet displays both the budgeted time for a particular Task or project as well as the actual time accrued for that Task by role at any time during the workflow. This highlights real-time disparities so that they can be addressed before the work is completed.

- Reporting – the budgeted and actual time captured on the detail and firm-customized reports allow firms to compare disparity on an individual client or Task basis, as well as across the entire client base, for client billing, staff training, and future budget planning.

CRITERIA FOR ELIGIBILITY

The Time & Billing enhancement contains a number of factors that must be accounted on the client end for the integration to work effectively. The content of each is covered in subsequent sections.

The high level criteria for integration include:

1. Client must first complete, or have already completed, the initial integration process to connect the client databases. This guide does not cover those requirements.

2. Skill Level: This field must be populated on each employee in CCH Practice Management.

3. Service Code: The service code structure must be established in CCH Practice Management in a manner that allows XCM to map Subcategories to corresponding XCM Task types.

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4. Time Entry: The one custom field made available within CCH Practice Management Time Entry must not be utilized or repurposed in order to allow a period end date to be entered during the time entry process.

An XCM consultant must evaluate your firm against the above criteria to determine eligibility for the Time & Billing integration. For firms that are not immediately eligible for the integration, the XCM consultant will outline the update requirements related to the CCH Practice Management configuration. Each firm must determine the impact of these change requirements and address the level of effort related to those changes internally with firm resources.

The integration will pull released time from PM into the specific Task within XCM at the specific role shown on the XCM routing sheet.

The following table shows the PM mapping field and its corresponding field in XCM.

PM Field	XCM Field
Client Data ➡	Client Data
Service Codes ➡	Task Types
Skill Levels ➡	Roles
XCM Custom Field ➡	TaskPE Date

EVALUATION PROCESS

A firm must provide the following information before scheduling work to an XCM resource:

1. To start the integration process, send an Excel file of your current service code listing and skill level listing to support@xcmsolutions.com.

2. Review the programming needed for use of the PM Time Custom field and provide a screenshot of the programming completed.

3. Include your IT contact, phone and email.

This information will be quickly reviewed by an XCM consulting resource and the firm will be notified of their prioritization on the completion of the initial evaluation.

The evaluation process will begin on receipt of all aspects of the requested information. This evaluation process will take approximately 1-2 weeks and the client can expect a determination at the conclusion of the evaluation process. Assuming all criteria related to the evaluation process are satisfied, the client will be provided with a timeline for the installation and completion of the time integration process.

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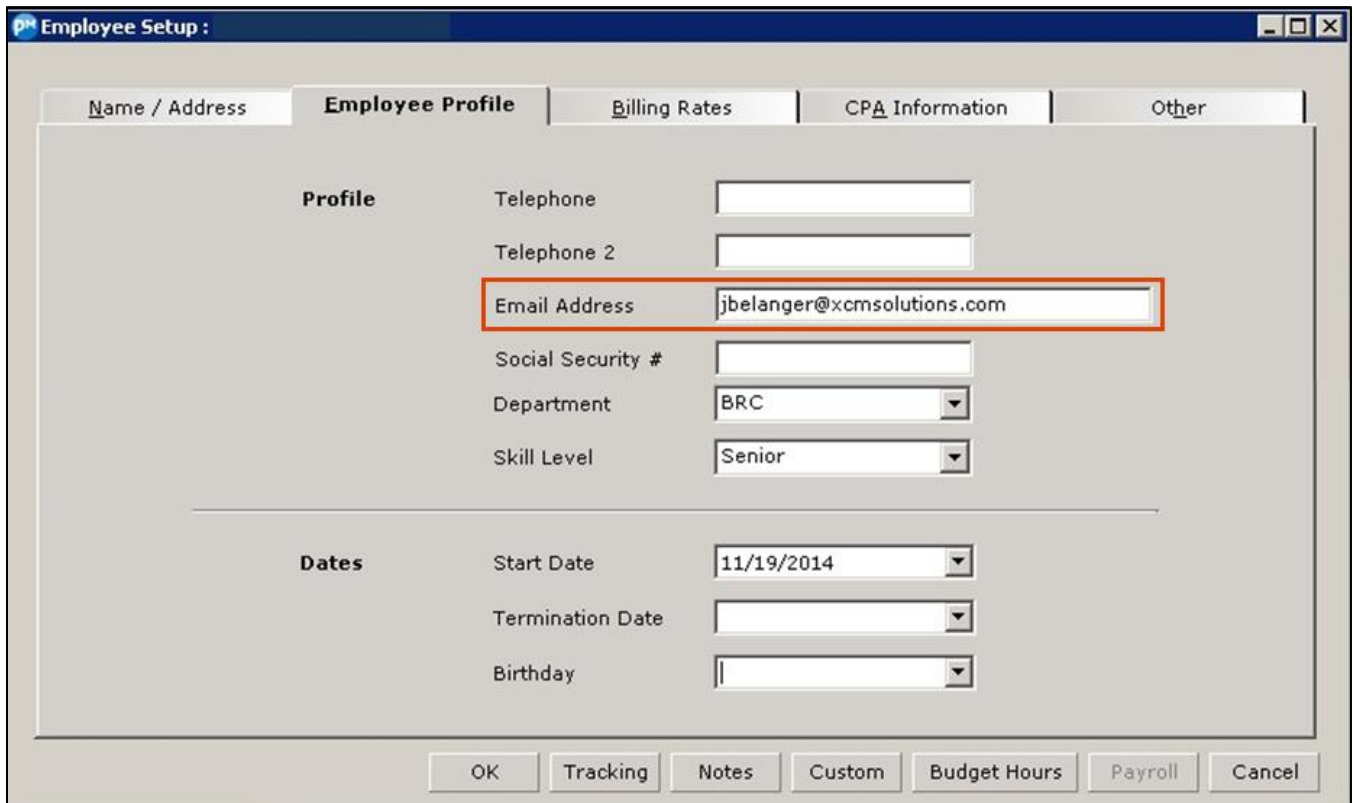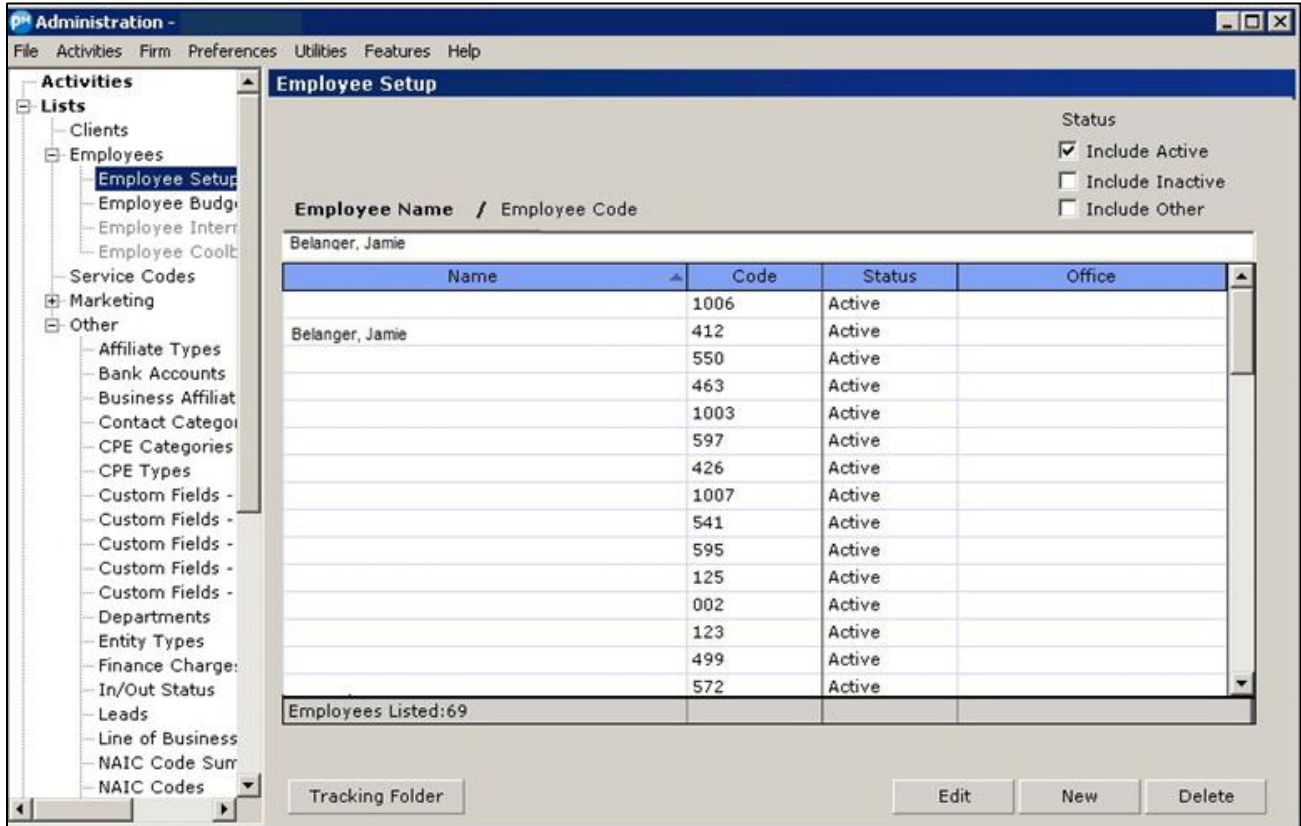Email support@xcmsolutions.com today!
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EMPLOYEE PROFILES

For the integration to work correctly, XCM requires employee specific information to be **Populated** and **Mapped correctly between systems**.

The following section describes the information required for the evaluation process.

Email Address

XCM looks up the employee's email address from the PM **Email Address** field while matching staff time entry to the corresponding Tasks, roles, levels, etc. The email address in CCH Practice Management must exactly match the user's login email address in XCM or the user mapping synchronization will not work.

Skill Level

Skill Level allows firms to categorize employees according to professional levels. Each employee must have a skill level assigned to their user profile in CCH Practice Management. This skill level will be used to map the user to the XCM role(s) that user provides on your client engagements. This skill level mapping can be accomplished in a **one to many** relationship.
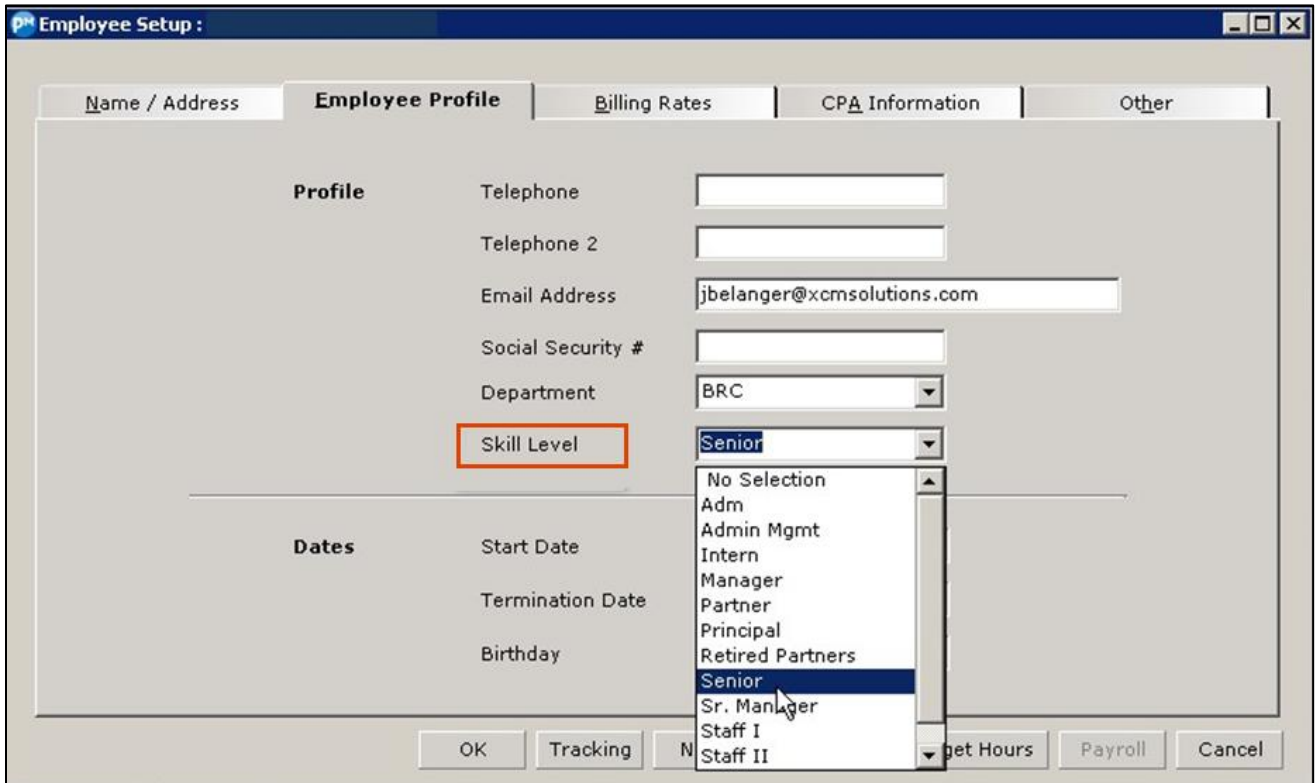
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Requirement: Firms must provide XCM with a listing of all skill levels currently utilized in their CCH Practice Management application. This information can be found in the following location in PM: **Administration→Lists→Other→Skill Levels**
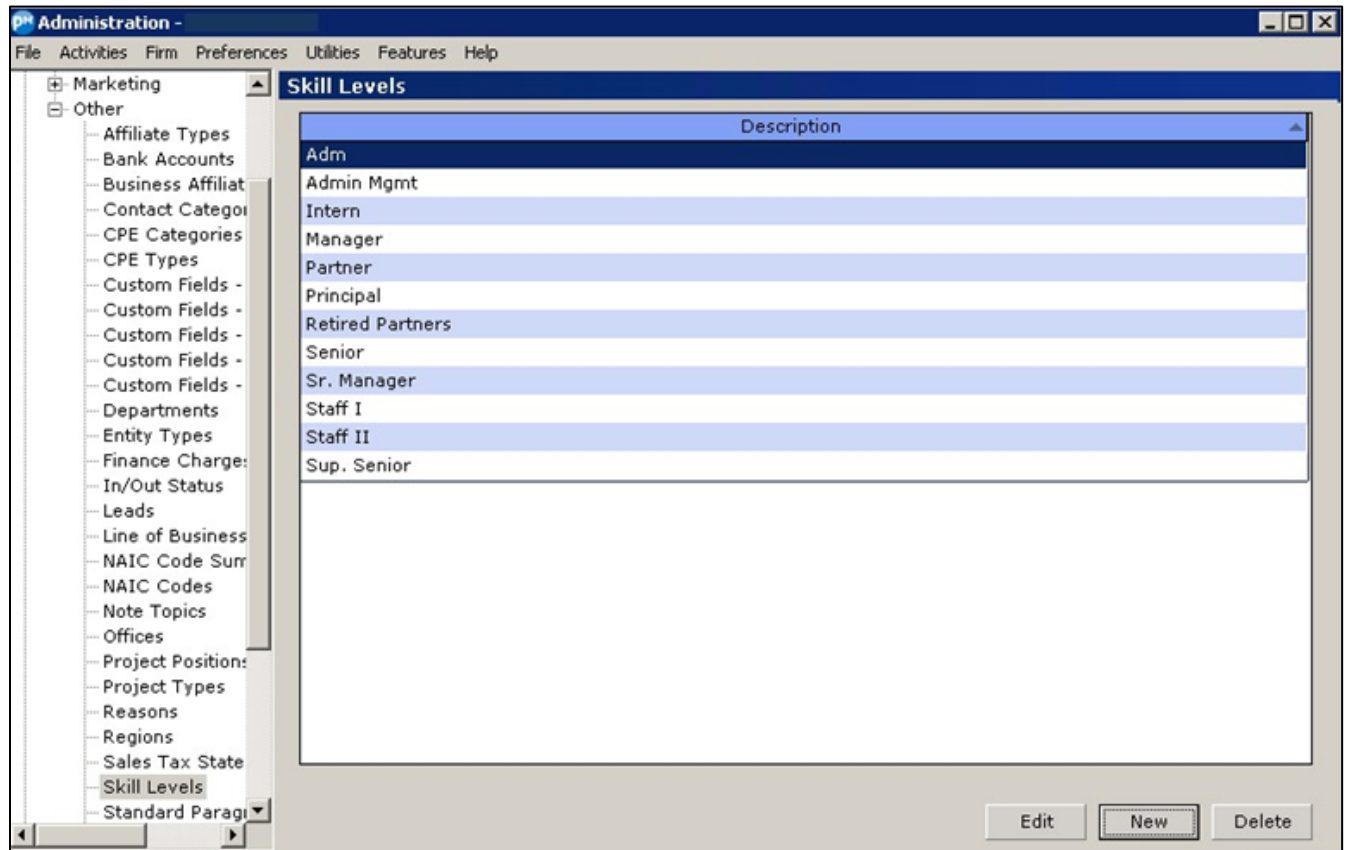
Firms that do not populate skill levels are not eligible for the integration process until these fields are created, populated within each employee profile, and the list provided to XCM for evaluation.

Populating Skill Levels in CCH Practice Management

The process to create Skill Levels is as follows:

1. Click **New** in the **Administration** screen to open the **Skill Level Setup** screen.

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2. Enter the **Skill Description** and click **OK**.
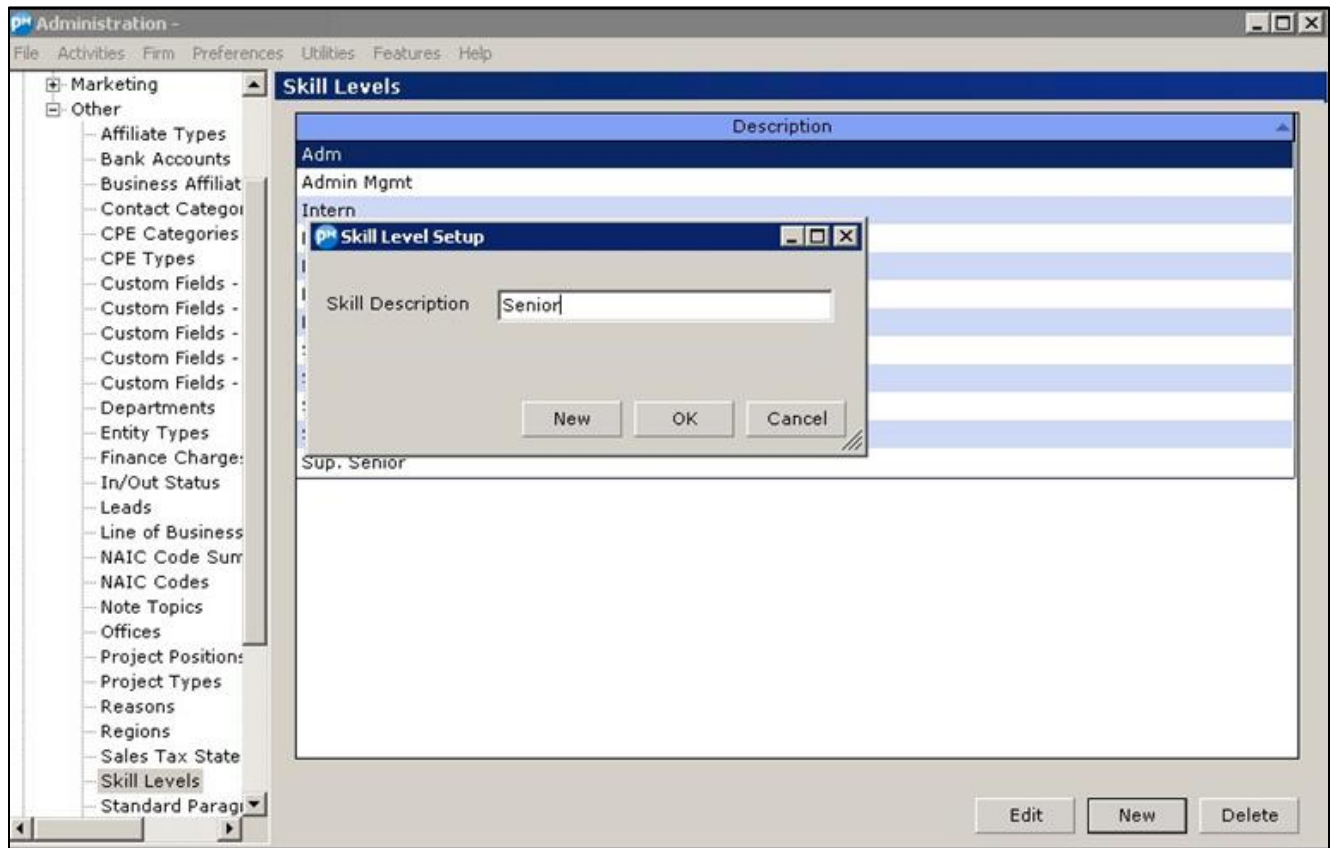
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3. Select the Employee Profile. To access the Employees Profile in PM, go to
   Administration→ Lists→ Employees→ Employee Setup

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4. Apply the **Skill Level** to the **Employee Profile**.

SERVICE CODE STRUCTURE

The quality of data and accuracy of the integration process directly relates to the Service Code structure established in CCH Practice Management. The integration specifically looks to the Sub Category level and is used to identify the Service Codes and their related XCM Task Types. Firms that do not have a consistent approach to the architecture of their Service Code structure may not be eligible for the Time & Billing Integration.
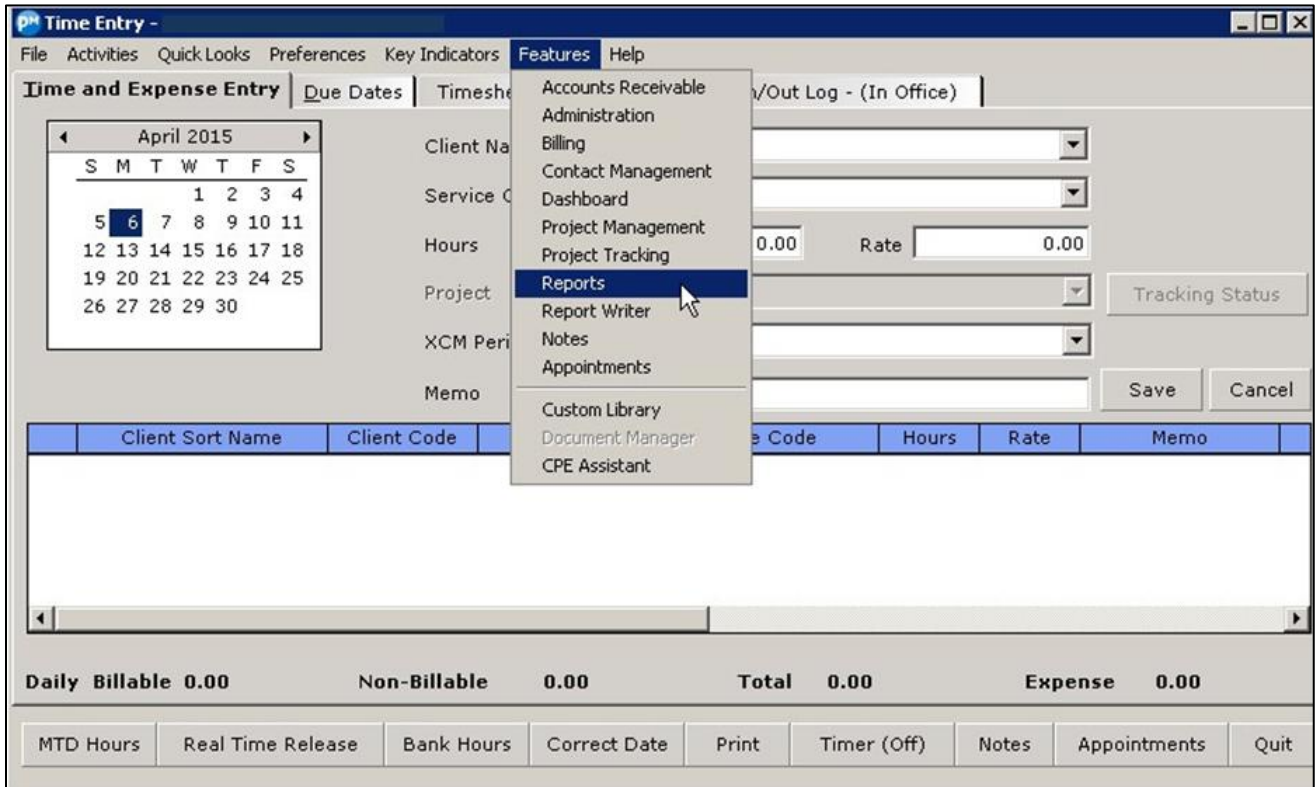
Requirement: Provide XCM with a listing of all Service Codes currently utilized in your CCH Practice Management application. This information can be gathered by using the following reporting option within the CCH Practice Management report suite.

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In PM Time Entry, go to **Features** and choose **Reports** to open the **Reports** screen.
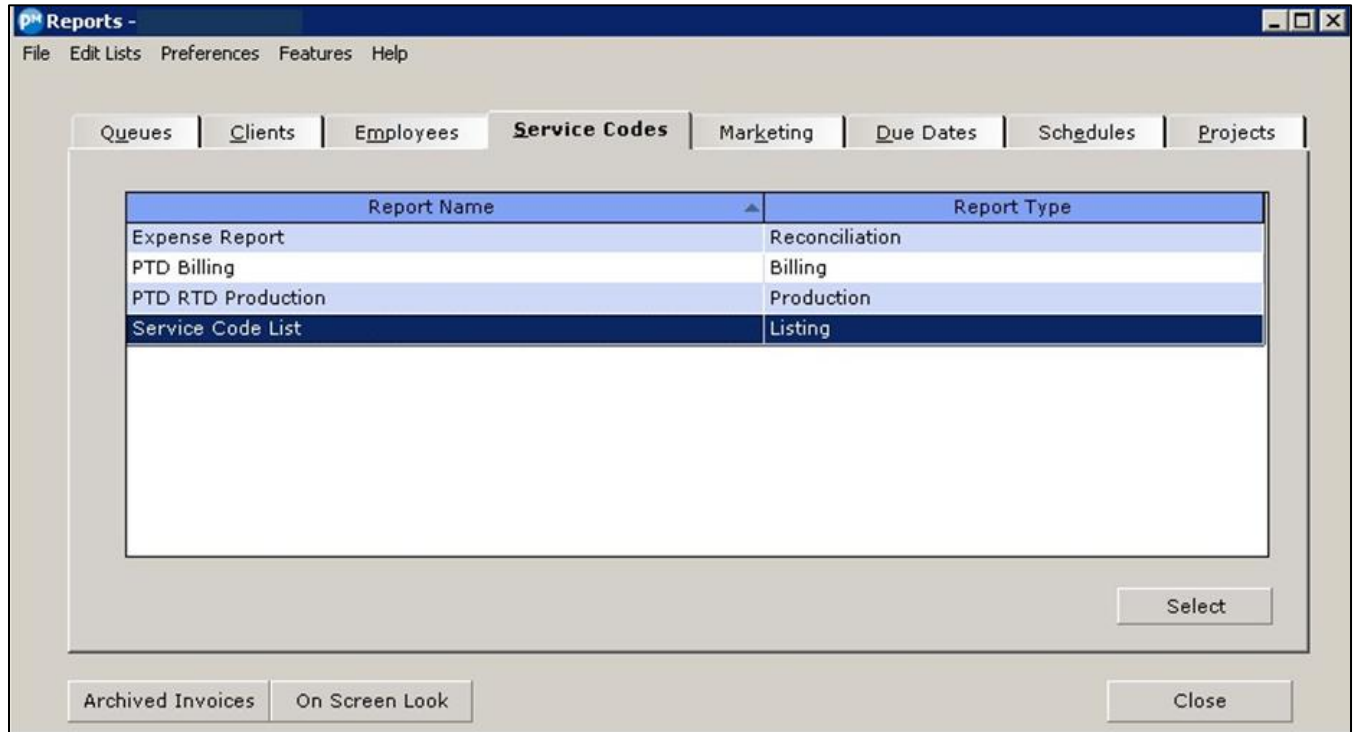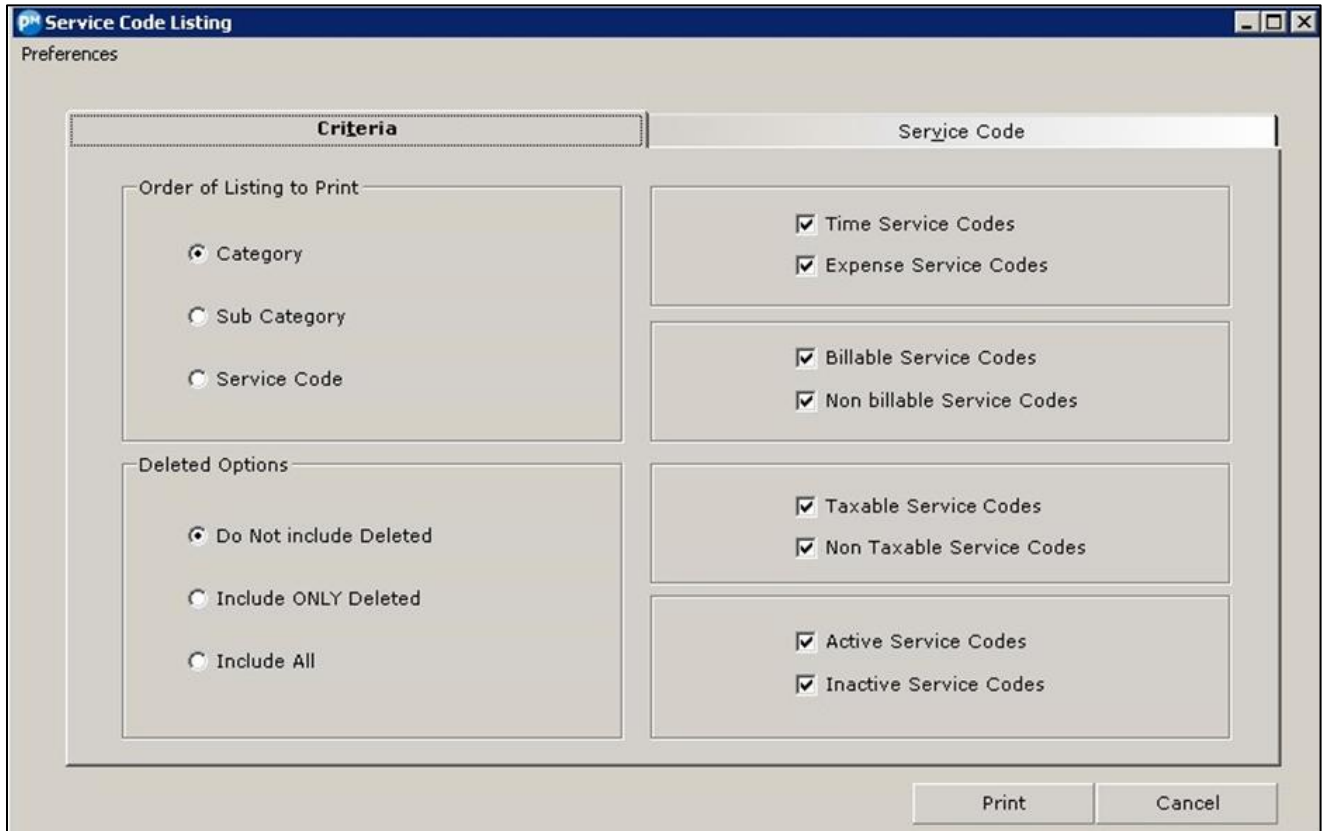

In the **Reports** screen, choose the **Service Codes** tab to display the different report types available. Select the **Service Code List** report name and click **Select** to open the **Service Code Listing** report screen.

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Enter the following criteria and click **Print** .This opens the **Printer/Format Selection-Service Code Listing** dialog box.

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PM Service Code Listing

Preferences

Criteria	Service Code

Order of Listing to Print

- ⦿ Category
- ○ Sub Category
- ○ Service Code

Deleted Options

- ⦿ Do Not include Deleted
- ○ Include ONLY Deleted
- ○ Include All

☑ Time Service Codes
☑ Expense Service Codes

☑ Billable Service Codes
☑ Non billable Service Codes

☑ Taxable Service Codes
☑ Non Taxable Service Codes

☑ Active Service Codes
☑ Inactive Service Codes

Print   Cancel

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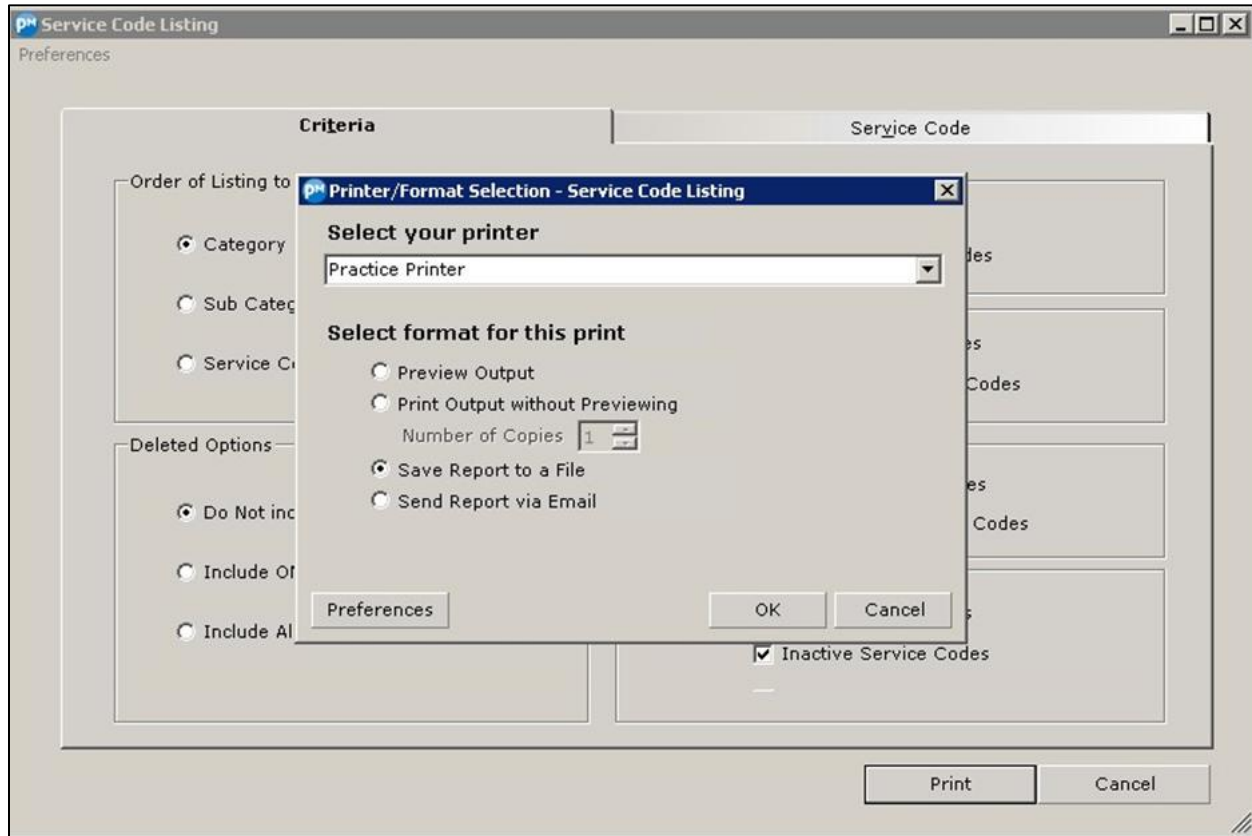
You can now choose one of the following:

- See the preview of your file before printing.

- Print without previewing the file.

- Save the report to a file using the option **Save Report to a File.**

- Send the report to XCM support through e-mail.

When you choose the **Save Report to a File option** button, a dialog box opens to save the file in more than one format.

To save the file in the Excel format, select Excel from the **Select Save As Formats** drop-down list.

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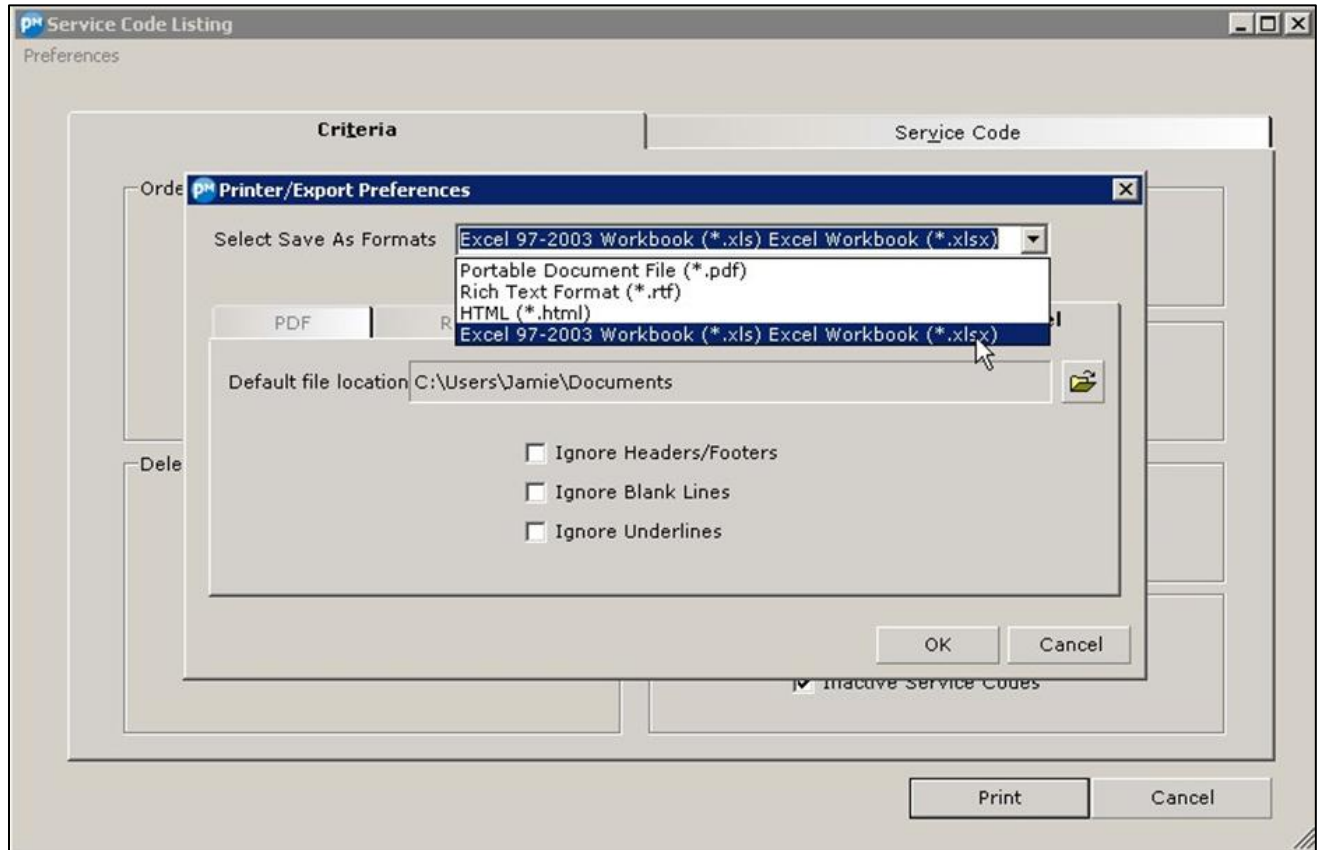
Sub Category Code

Time & Billing Integration is fully dependent on the method in which the firm has established the Subcategory Code related to the established Service Code structure. Within CCH Practice Management, all Service Codes are set up using the following hierarchy: Category > Subcategory > Service Code

In the following example, the highlighted section illustrates the Subcategory. XCM will utilize this subcategory to dictate the flow of data between the time entered to the client engagement within CCH Practice Management and the corresponding Task related to the client within XCM Solutions.
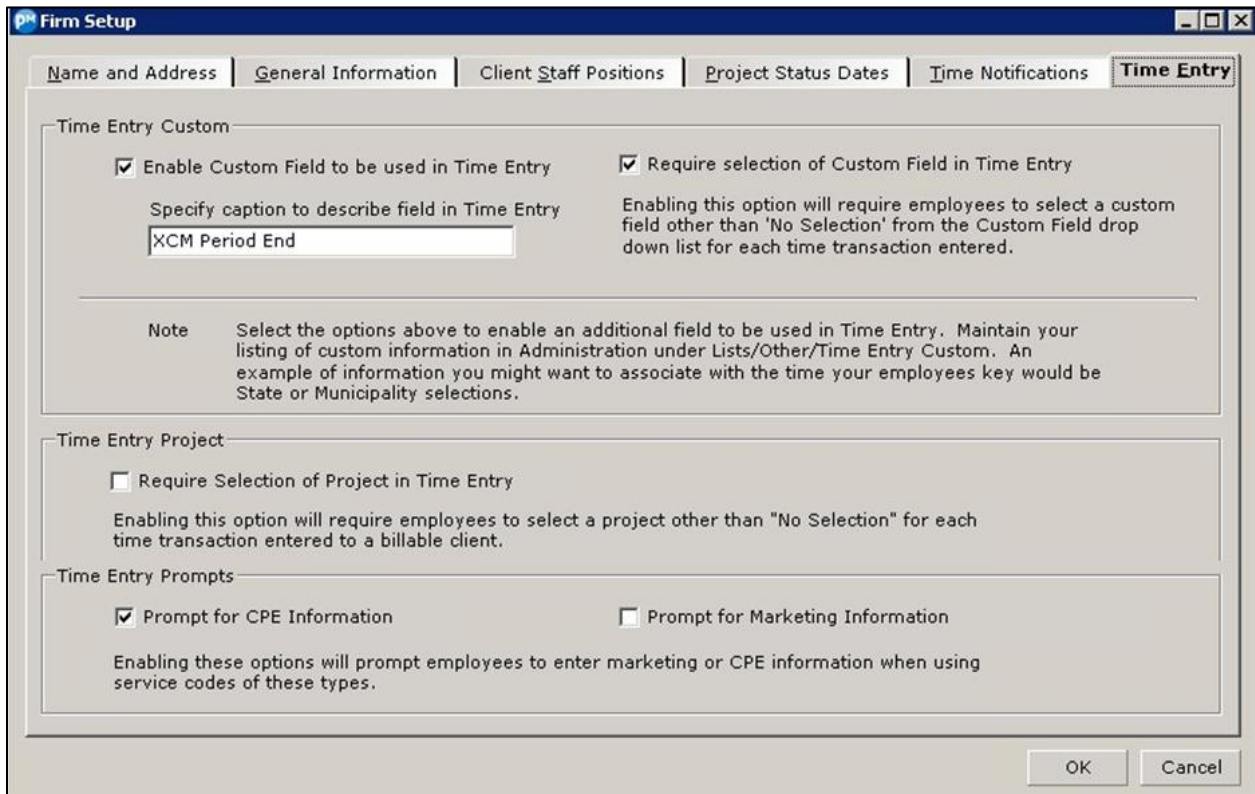
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Example: Any Service Code utilized during time entry related to the 1040-1040 tax Subcategory would be mapped to the Tax–1040 Individual Task Type within the firm's XCM Solutions workflow product (not pictured)
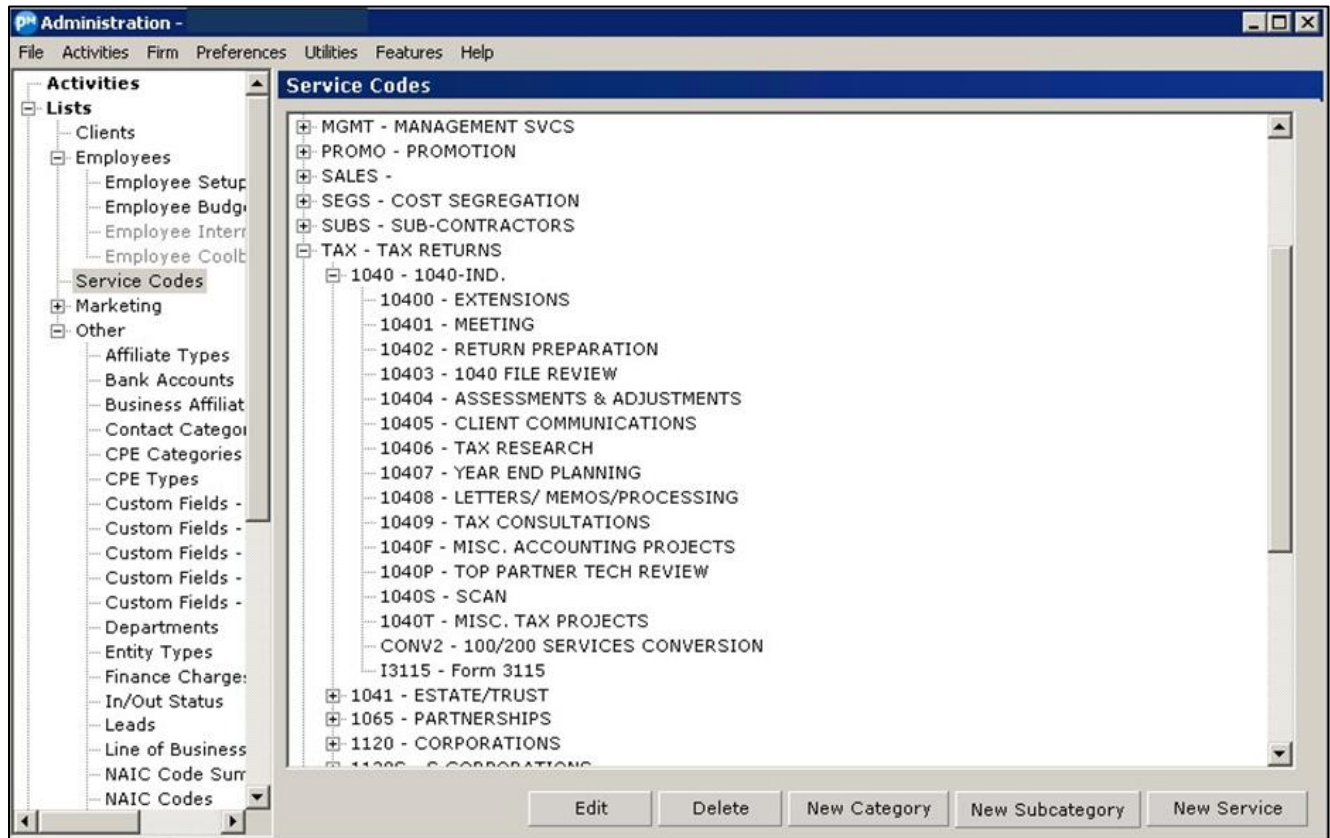
Not all service codes need to be mapped. If you are tracking non-billable time in PM you can choose to exclude the service code from the mapping, no time will be carried forward. Mapping the service codes directs the released time to a specific existing Task Type within XCM. The service code mapping is limited to one Task Type per subcategory. Firms need to create new service codes as follows:

The hierarchy applied is **Category→Subcategory→ Service Code**

Go to **Administration> Lists > Service Codes**, this provides options to add a **New Category**, **New Subcategory** and **New Service**.

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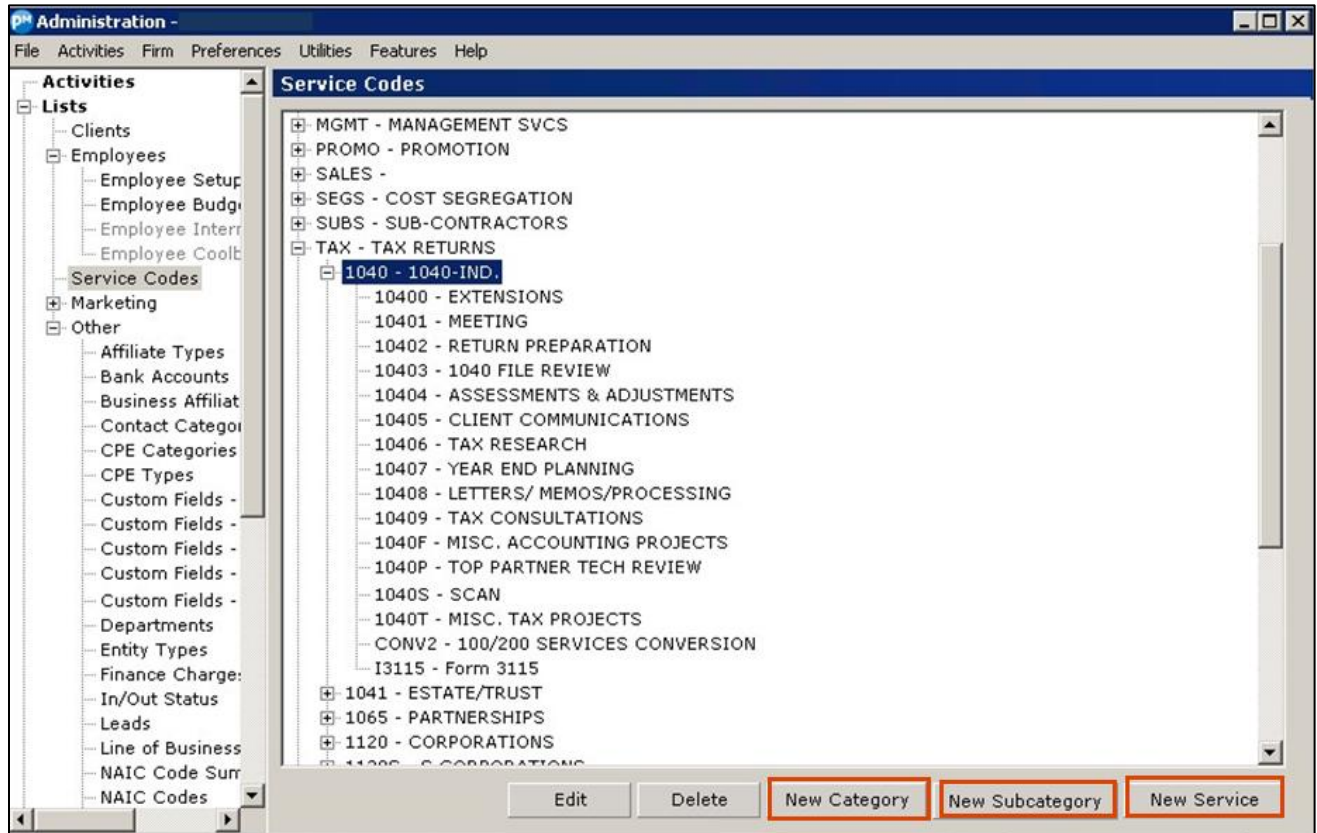
TIME ENTRY REQUIREMENT

The firm must utilize a custom field available for the Time Entry module of CCH Practice Management. The purpose of this field is to capture the period end date related to the client engagement time being entered. If this custom field is currently in use for another purpose, the client is immediately ineligible for the integration process unless the firm converts the utilization of the field for capturing the period end date.

Custom Field in Time Entry

The custom field in time entry is configured within the Firm Setup feature contained in the Administration module.

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Select **Firm Setup** to open the **Firm Setup** screen.

In the Firm Setup screen, choose the **Time Entry** tab. You need to do the following:

- Select the **Enable Custom Field to be used in Time Entry** check box and type the caption XCM Period End.

- The **Require selection of Custom Field in Time Entry** check box selection is optional. If a firm requires the XCM Period End date for all entries, it is recommended that you do not select this check box until the integration has been finalized.

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BUSINESS RULES FOR TIME ENTRY UPDATES

The following table describes the conditions related to the Skill level mapping and the rules applied.

Scenario	Expected Results
Skill level mapped to one role:	
User listed in role, role has budget time	Time post to role
User listed in role, role does not have budget time	Time post to role, name bottom populated role
User not listed in role, role has budget time	Time post to role, name bottom populated role
User not listed in role, role does not have budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role has budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role does not have budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role has budget time (User listed in unmapped role)	Time post to role, name bottom populate as secondary
Different user listed in role, role does not have budget time (User listed in unmapped role)	Time post to role, name bottom populate as secondary
Skill level mapped to more than one role:	
User is listed in both roles, both roles have budget time	Time post to bottom role
User is listed in both roles, top role has budget time	Time post to top role
User is listed in both roles, bottom role has budget time	Time post to bottom role
User is listed in both roles, neither role has budget time	Time post to bottom role
User is not listed in either role, both roles have budget time	Time post to bottom role, name bottom populate role
User is not listed in either role, top role has budget	Time post to top role, name bottom populate role
User is not listed in either role, bottom role has budget	Time post to bottom role, name bottom populate
User is not listed in either role, neither role has budget	Time post to bottom role, name bottom populate
Skill level mapped to more than one role, different user listed both roles	
Both roles have budget	Time post to bottom role, name bottom populate as secondary
Top role has budget	Time bottom post to the top role, name bottom populate as secondary
Bottom role has budget	Time bottom post to bottom role, name bottom populate as secondary
Neither role has budget	Time bottom post to bottom role, name bottom populate as secondary
Both roles have budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary
Top role has budget (User listed in unmapped role)	Time post to top role, name bottom populate as secondary
Bottom role has budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary
Neither role has budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary

XCM FIELDS TO COMPLETE SYNCHRONIZATION

This section provides detailed information on the XCM Utilities related to the integration.

User Rights

Users must be coded within the Manage User Utility for the **Manage Integration Services** user right.

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Manage PM Skill Level Mapping

The skill levels created and applied to the PM employee profile must be mapped to the corresponding role(s) in XCM. To do this, access the Manage PM Skill Level mapping utility.

From the Utilities menu ⚙, go to One Time Mapping and then click **Manage PM Skill level Mapping**.

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Choose the **External Skill Level** on the top-left of the page and the corresponding **XCM Role Name** on the right of the page. To choose multiple XCM roles, hold down the CTRL key.

Manage PM Service Code Mapping

The service codes created in PM must be mapped to the corresponding Task Type in XCM. This mapping is limited to one service code per Task Type as discussed during the qualification process.

From the Utilities menu ⚙, go to One Time Mapping and then click **Manage PM Service code Mapping**.

Select the relevant service codes from the **Practice Management Service Code** screen and apply it to the corresponding **XCM Task Type** chosen from the drop-down list at the top of the page. Not all service codes need to be mapped.

The **Export** button at the top of the screen will allow the firm to view the service code mapping in an Excel format.

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	XCM Task Type				
XCM Task Type:		Tax - 1040 Individual ▼			
			Save	Close	Export

	Practice Management Service Code				XCM Task Type
	Category	SubCat	Description	Service	XCM Task Type
☐	TAX	1040	EXTENSIONS	10400	Tax - 1040 Individual
☐	TAX	1040	MEETING	10401	Tax - 1040 Individual
☐	TAX	1040	RETURN PREPARATION	10402	Tax - 1040 Individual
☐	TAX	1040	1040 FILE REVIEW	10403	Tax - 1040 Individual
☑	TAX	1040	ASSESSMENTS & ADJUSTMENTS	10404	
☐	TAX	1040	CLIENT COMMUNICATIONS	10405	Tax - 1040 Individual
☑	TAX	1040	TAX RESEARCH	10406	
☑	TAX	1040	YEAR END PLANNING	10407	
☐	TAX	1040	TAX CONSULTATIONS	10409	Tax - 1040 Individual
☐	TAX	1040	MISC. TAX PROJECTS	1040T	
☐	TAX	1040	MISC. ACCOUNTING PROJECTS	1040F	
☐	TAX	1040	TOP PARTNER TECH REVIEW	1040P	Tax - 1040 Individual
☐	TAX	1040	Form 3115	I3115	Tax - 1040 Individual
☐	TAX	1040	SCAN	1040S	
☐	TAX	1041	SCAN	1041S	
☐	TAX	1041	TOP PARTNER TECH REVIEW	1041P	Tax - 1041 Fiduciary
☐	TAX	1041	MISC. TAX. PROJECTS	1041T	
☐	TAX	1041	MISC. ACCTG. PROJECTS	1041F	
☐	TAX	1041	MEETING	10411	Tax - 1041 Fiduciary
☐	TAX	1041	RETURN PREPARATION	10412	Tax - 1041 Fiduciary
☐	TAX	1041	FILE REVIEW	10413	Tax - 1041 Fiduciary
☐	TAX	1041	ASSESSMENTS & ADJUSTMENTS	10414	
☐	TAX	1041	CLIENT COMMUNICATIONS	10415	Tax - 1041 Fiduciary
☐	TAX	1041	TAX RESEARCH	10416	
☐	TAX	1041	YEAR END PLANNING	10417	
☐	TAX	1041	TAX CONSULTATION	10419	Tax - 1041 Fiduciary
☐	TAX	1041	EXTENSIONS	10410	Tax - 1041 Fiduciary
☐	TAX	1065	EXTENSIONS	10650	Tax - 1065 Partnership

Manage User Time Exception

XCM provides two options for managing Time Exception.

- All users can manage their personal exceptions using the Time Validation feature available under the user profile located at the top-right of the My View page.
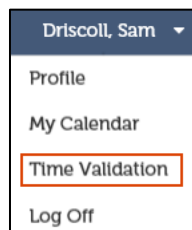
Driscoll, Sam ▼
Profile
My Calendar
Time Validation
Log Off

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- The management can view all user exceptions from the Manage User Time Exception utility. This utility will first show the entire firm exception list.

From the Utilities menu ⚙, go to One Time Mapping and then click **Manage User Time Exception** to open the following screen.

XCM offers filters to narrow down the list by user name.

Changes can be applied directly to this utility by selecting the exception, using the auto fill **Task Search** to find the Task associated, and selecting the **XCM Role** Name.

Saving will then apply the time to the task/role selected. A delete option is also available in this report. The Export button at the top of the screen enables the firm to view the exception list in an Excel format.

Import Actual Hours Into XCM

PM / XCM synchronization happens nightly at midnight. If a firm needs to manually pull their time data from PM into XCM prior to the nightly run, they can do so using the **Import Actual Hours into XCM** utility.

From the Utilities menu ⚙, go to Integration Utilities and then click **Import Actual Hours Into XCM** to open the following screen.

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Search filters allow the firm to narrow down the time data to be pulled into XCM by date range, Client Name or User LastName. You must enter the relevant date in the **Release Date From** and **Release Date To** fields. This data pulls the released time directly from the PM application.

The released time data is based upon the search criteria and this may include time already pulled into a Task. In the event that you import time data that has already been posted, it will not duplicate.

Search results can also be exported to Excel.

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	Client Name	User Name	Posted Date	Service Code	Service Desc	Hours
1			5/13/2015 12:00:00 AM	1040	EXTENSIONS	2.50
2			5/13/2015 12:00:00 AM	1040	EXTENSIONS	5.00
3			5/13/2015 12:00:00 AM	1040	EXTENSIONS	2.00
4			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
5			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
6			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
7			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
8			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
9			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
10			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
11			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
12			5/13/2015 12:00:00 AM	1065	EXTENSIONS	3.25
13			5/13/2015 12:00:00 AM	1065	EXTENSIONS	3.25

Manage Settings and Defaults

When the databases have been linked and the mapping is complete, the last step for the integration is to turn on the synchronization. This is done within the Manage Settings and Defaults utility.

From the Utilities menu ⚙, go to Setup Utilities and then click **Manage Settings and Defaults** to open the **Firm Settings** screen.

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Click the **Integration Settings** to expand the options and select the **Update Actual Hours from another system** check box under **Client/Entity Import Settings**.

Be sure to save the integration settings. When the settings are saved, all future released times for linked clients will post to the corresponding Task based upon the mapping completed.

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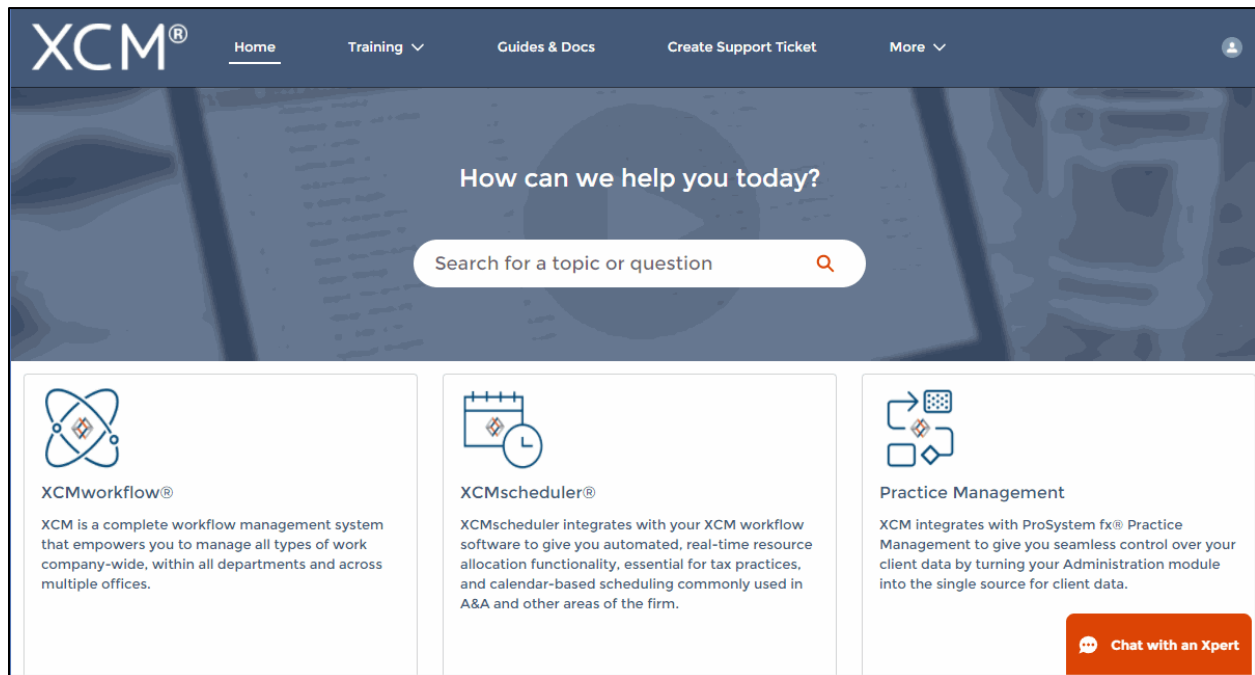
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HELP CENTER

The Help Center is accessible directly from your firm's site through the Help link in the upper right-hand corner of your screen, providing access to User Guides, Training, and Support.

Training

- XCM developed a comprehensive training program that empowers users to begin using the software quickly. Unlimited access to live web-based training highlighting key areas of functionality will help you and your team maximize the use of XCM.

- The schedule for the Web Based Training Sessions is available in the Help Center.

Guides and Docs

- A library of on-demand Web Courses complements the live web-based trainings, with a focus on key functions and best practices. A full User Guide outlining all the relevant elements of the XCM software including all utilities and advanced functionality, as well as an overview of all the reports in XCM is also available.

User Support

- XCM provides multiple levels of support including email responses, escalated phone support and interactive web-based support. Our support team utilizes Ring Central software that allows us to troubleshoot specific issues remotely and take control of users' desktops if required.

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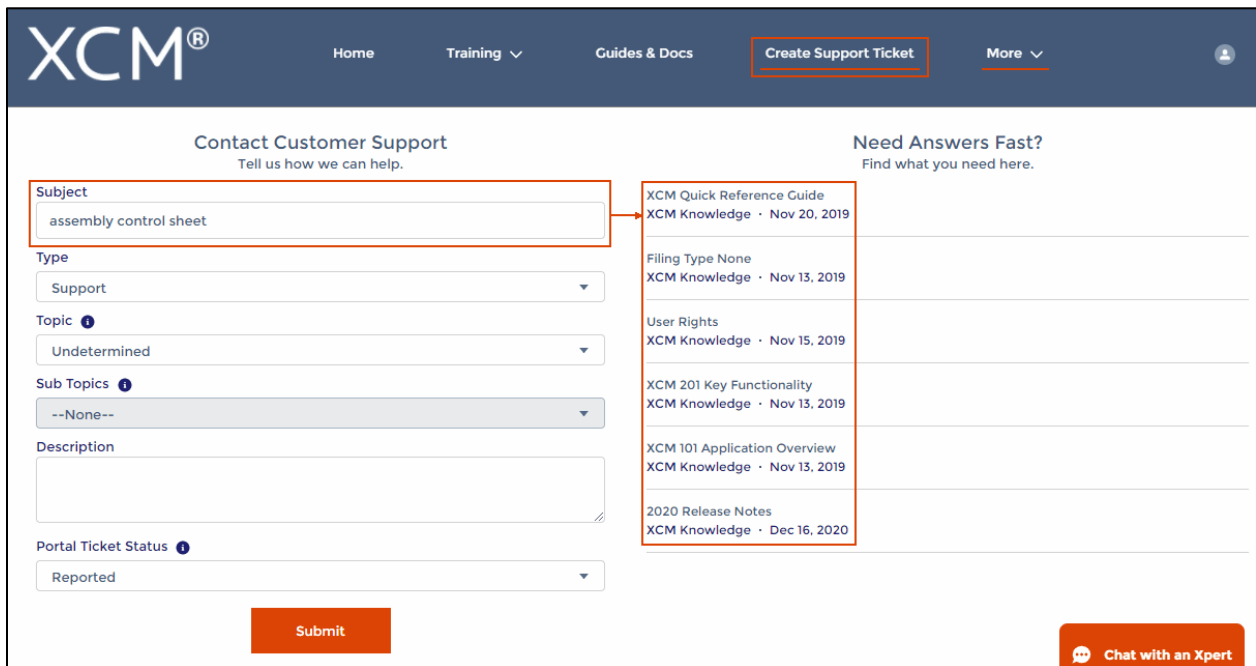Last Updated: May 2021

- XCM has a 95% success rate for responding to all online inquiries within 2 hours. Users are encouraged to submit a request to create a **Support Ticket** with the description and type of support required. For faster response, an online **Chat** help is available between 9 a.m. and 5 p.m. EST, Monday through Friday.

- Users can also submit all inquiries to support@xcmsolutions.com, if your inquiry requires a direct response via phone or a remote meeting, your ticket will be escalated to the appropriate client service representative. Support hours are 7:00 a.m.–10:00 p.m. EST, Monday through Friday, with extended support on Saturdays and Sundays from January 1–April 30.

Some guidelines to Create a Support Ticket

In the **Create Support Ticket** page, the following levels of support are available.

1. **Preliminary assistance through Self Help Docs**

   When you type a keyword in the **Subject** field, related documents are displayed on the right side of the page. You can review these documents for first-level information on the topic you are seeking.

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2. Create a Support Ticket

A support ticket can be raised by providing the following information.
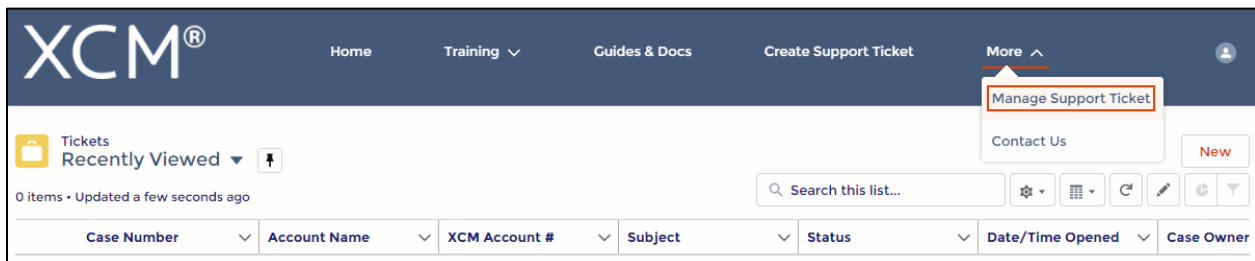
Users can monitor the status of their open support tickets through the **Manage Support Ticket** option.

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