

CCH iFirm Learning Portal

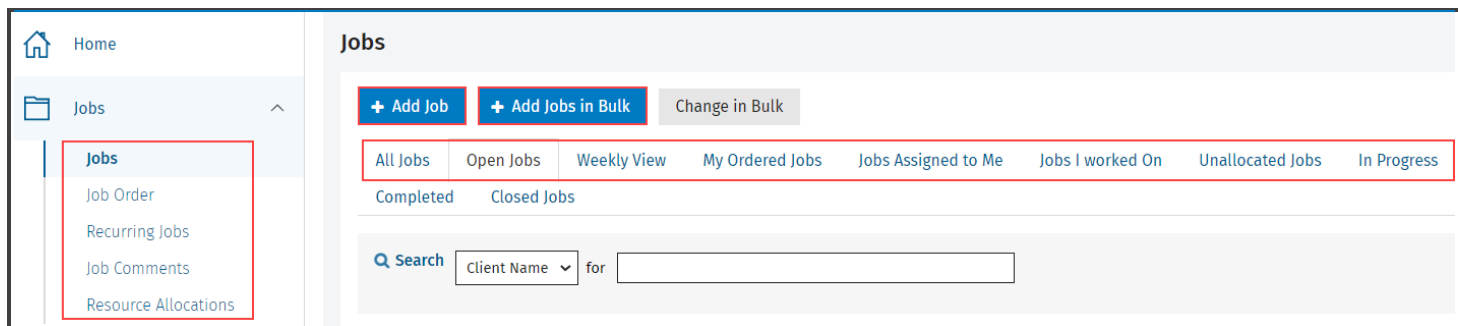
What is CCH iFirm Practice Management?

The Practice Manager module of CCH iFirm allows you to track the work you do for clients. This includes creating jobs for various tasks you are completing, tracking the amount of time spent on jobs, and managing the billing and invoicing aspects of your business. Practice Manager also includes reports to help you manage and grow your business.

Jobs

From the Jobs menu, you can create a single job, or create jobs in bulk for your contacts. You can also view and manage your existing jobs using the various tabs available on the Jobs page.

Jobs allow you to prioritize work, add checklists and notes to maintain efficiency, and assign work to specific preparers.



Timesheets

Use timesheets to track the amount of time you and your employees spend on specific tasks. You can indicate whether tasks are considered billable, non-billable, or paid non-billable. Timesheet entries also allow you to update the status of a job, who is currently responsible, and add comments about the work done.

My Timesheet - Megan Caldwell

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Add Timesheet Entry

Select Entry Type
 Billable Non-Billable / Paid Non-Billable

Job

Current Job Status

Currently Responsible

Start Time

End Time
 0.5000 Hours

Activity Code

Comment

Friday, March 11 2022 **Billable: 100%** **Total Hours: 2.0000**

08:30 AM To 10:30 AM (2.0000) @ 0.00 = 0.00
 CSLT On 14 (GEN Apr 18 2022) for Hammonds, John (45)

Invoicing

Practice Manager enables your firm to generate invoices for jobs at any time, rather than waiting until the end of the month. You can create multiple invoices for a job, whether the job is open or closed. You can create invoices individually or in bulk, and add a disbursement, write-on, or write-off as needed.

Jobs to Invoice

 Name for

<input type="checkbox"/>	<input style="font-size: 0.8em; vertical-align: middle;" type="button" value="+"/>	Job	Code	Name	Current WIP	Budget Total	Draft Total	Invoiced	Job Status
<input type="checkbox"/>	<input style="font-size: 0.8em; vertical-align: middle;" type="button" value="+"/>	10 ACC Feb 28 2022	36	Barnes, Karen	225.00		225.00		<input type="button" value="Complete"/>
<input type="checkbox"/>	<input style="font-size: 0.8em; vertical-align: middle;" type="button" value="+"/>	14 GEN Apr 18 2022	45	Hammonds, John	0.00	<input type="text" value="150.00"/>			<input type="button" value="Active"/>
<input type="checkbox"/>	<input style="font-size: 0.8em; vertical-align: middle;" type="button" value="+"/>	2 GEN	1	Anderson, John	0.00		0.00		<input type="button" value="Pending"/>

Reports

Practice Manager provides you with a wide range of reports. These can help you measure the performance of team members, see how your firm is performing, and much more. Whether you need to keep track of a particular employee's performance in relation to other team members, the revenue generated by each partner in your firm, or write-ons for the firm or resources, you will find a report to provide you with all these details and much more.

All Reports

[Favorites](#) [Contacts](#) [Practice Management](#) [Client Portal](#)

- Cashflow & Revenue Reports**
 - ☆ [Cashflow Analysis by Partner](#)
 - ☆ [Cashflow Analysis by Manager](#)
 - ☆ [Revenue Analysis by Partner](#)
 - ☆ [Revenue Analysis by Manager](#)
 - ☆ [Revenue Analysis by Client Type](#)
 - ☆ [Annual Cashflow](#)
 - ☆ [Annual Revenue](#)
- Employee Reports**
 - ☆ [Actual / Allocated Hours Report](#)
 - ☆ [Monthly Efficiency](#)
 - ☆ [Timesheet](#)
 - ☆ [Timesheets by Job Type](#)
 - ☆ [Timesheets by Activity Code](#)
 - ☆ [Non-billable Time](#)
 - ☆ [Non-billable and Paid Non-billable Time](#)
 - ☆ [Timesheet Summary](#)
 - ☆ [Write-on Summary](#)
 - ☆ [Variance](#)
- Workflow Reports**
 - ☆ [Job Status Summary](#)
 - ☆ [Days at Current Job Status](#)
 - ☆ [Auto Resource Allocation](#)
 - ☆ [Job Hours Analysis](#)
 - ☆ [Current Resource Allocation Variance](#)
 - ☆ [Resource Allocation](#)
 - ☆ [Non-Allocated Resources](#)
 - ☆ [Resource Allocation Breakdown](#)
 - ☆ [Resource Usage by Partner](#)
 - ☆ [Resource Usage Breakdown by Partner](#)
 - ☆ [Recurring Jobs](#)
- Client Profitability Reports**
 - ☆ [Client Profitability](#)
- Billing & Receivables Reports**
 - ☆ [Billable Time Breakdown by Period](#)
 - ☆ [Billable Time by Period](#)
 - ☆ [Finalized Invoices](#)

 Review the individual lessons for more detailed information on using these features.