Claude in the practice, with a file that survives *review*.

Where Claude fits in compliance season, where client data sits, what a practice review would find, and what the first step asks of the firm. Full detail is at www.airclerk.ai/accounting.

01 WHAT THIS IS

Governed Claude workflows for public practice.

Airclerk implements Claude across the bounded, reconciled work that fills compliance season: year-end workpaper assembly tied to the trial balance, provisional tax schedules and client letters, FBT workings, payday-filing reconciliations and IRD correspondence triage.

Behind it sits the NZ Accounting Pack, 25 skills written for New Zealand public practice, five of which do research and cite only what the run actually opened, and a Xero connection covering all 312 operations Xero publishes for its Accounting, Assets and NZ Payroll APIs.

02 WHERE CLIENT DATA SITS

Your data stays in your Claude environment.

Airclerk installs the pack into the firm's own Claude environment, under the firm's own agreement with Anthropic, and configures it there. Client records stay in that environment; Airclerk does not hold or process them to run the pack. Secure configuration is part of the work, including turning off the use of your data for model training where the provider offers the setting.

One client's records are walled off from another client's work, and each workflow reaches only what the firm scopes it to. Airclerk is certified to ISO/IEC 27001:2022 (certificate 1677-I-1, Global Compliance Certification, JAS-ANZ accredited). Our data-handling documentation and security pack are available on request.

03 WHAT A PRACTICE REVIEW WOULD FIND

Drafts, verification tags and a retained record.

Outputs are drafts for the reviewing accountant. Rates and dates carry verification tags, and every schedule ties to the ledger or states its difference. A retained AI Workpaper records what the work relied on, what was checked, who reviewed it and who signed it off: the things a file reviewer samples under PS 1 and the NZICA Code of Ethics.

Airclerk does not make a file compliant. The firm's quality management system does that. Our work is making sure AI-assisted output leaves the evidence that system needs.

04 WHERE FIRMS START

Year-end workpapers. Judgement stays with the accountant.

The implementation is built around year-end workpaper preparation: the highest-volume work in the practice, with a trial balance to tie back to and a review a partner already knows how to run. Most of the other skills in the pack support that job, from the GST and payroll reconciliations that feed the file to the chasers that unblock it.

Final numbers, tax positions, structuring advice and anything filed stay behind stricter gates, with the accountant. Every consequential output has a named reviewer: partner, manager or the engagement's responsible reviewer.

SIX WEEKS

05 THE FIRST STEP

A scoping call, then a six-week implementation.

The scoping call qualifies the fit before any engagement: your systems, your client base, your professional obligations, your balance-date load. The implementation then runs six weeks against the pack's defined scope and delivers:

- Week one on your systems: a compatibility review and a professional-obligations map, including the AML/CFT and tax-agency boundaries.
- Year-end workpaper preparation configured to your client base, with the firm's own review standards drawn out and encoded.
- The skills the firm will run, configured to its templates, client mix and risk settings.
- A scoped Xero connection that reaches only what the firm approves.
- Reviewer gates and the AI Workpaper, tested on held-out client jobs before an accountant relies on them.
- Training for accountants and support staff, and reviews at 30, 60 and 90 days.