



OnPoint PCR

CPA.com/OnPoint | 855.855.5CPA



OnPoint PCR

A smarter way to
do preparation,
compilation, and review
engagements



AICPA®



CASEWARE®



CPA.com™

Enhancing the efficiency, quality and value of assurance and preparation services

Working on preparation, compilation, and review (PCR) engagements can be inefficient and time intensive. Today, many firms are manually building out files, struggling with the details around planning engagements, and sifting through guidance, workpapers and procedures trying to determine what is applicable for each client situation.

Designed to resolve these challenges, OnPoint PCR combines AICPA methodology and guidance with CaseWare's dynamic cloud platform, to

optimize preparation, compilation, and review engagements. OnPoint PCR enables your firm to enhance engagement quality while being more productive. The solution eliminates manual processes and unnecessary steps, by offering:

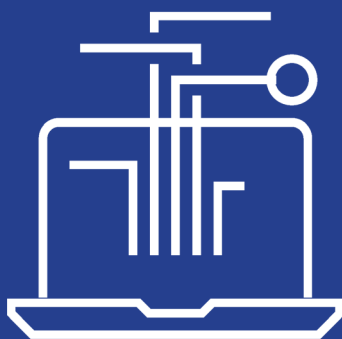
- **Intelligent methodology to build out engagements as you work**
- **A centralized platform for client and staff communications**
- **Automated letter and report generation**

Simplify your workflow with:



Guided engagements

The smart, interactive process helps eliminate unnecessary steps and facilitates compliance with professional standards



Integrated data

Simplifies data management and the import of client data, reducing redundant data entry



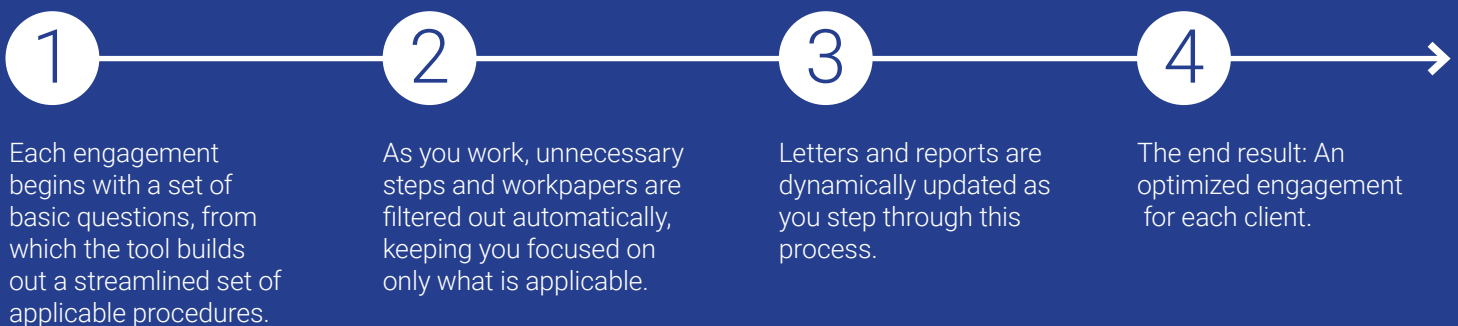
Robust cloud platform

Real-time updates to data and built-in collaboration tools that streamline communications across teams and with clients

Leveraging the core competencies of AICPA, CaseWare, and CPA.com, OnPoint PCR offers a single, integrated solution for preparation, compilation and review services.



Here's how it works:



The solution centralizes the many components of preparation, compilation and review work through a single platform:

- Engagement management
- Engagement methodology
- AICPA guidance
- PBC document management
- Trial balance tools
- Creation of reports and letters

Experience the benefits of a modern approach to engagements

Designed to address common pain points experienced by CPA firms, OnPoint PCR offers numerous benefits, including:



Confidence in Compliance: Helps ensure that your firm is providing accurate information and documentation in order to comply with professional standards.



Comprehensive Engagement Management: Integrates engagement letter creation, disclosure checklists and report generation into a single, efficient solution, eliminating the need to manage them separately.



Improved Collaboration: Provides multi-user access to engagements and gives you the ability to collaborate in real-time with your clients and colleagues, all from within the system. It also allows you to send, receive, and track all communications securely, eliminating the need to use third-party software or email.

"I have been using super-long checklists for years, and it is a lot of work to pare down those guides into what's applicable for each engagement. That's why the minute I saw the OnPoint PCR solution, I knew it would be a game-changer for me."

Contact us today

Optimize your preparation, compilation, and review engagements with OnPoint PCR.

Visit [CPA.com/OnPoint](https://cpa.com/OnPoint) or call 1.855.855.5CPA to learn more.

Jennifer J. Mansfield, CPA

