



## Efficient, high quality employee benefit plan audits

### OnPoint EBP

When auditing employee benefit plans (EBPs), firms often struggle with inefficient processes and engagement quality. Traditional practice aids can lead to a fair amount of redundant data entry, other inefficiencies, and poor documentation requiring extra work to ensure the audit complies with professional and regulatory requirements.

Designed to resolve these challenges, OnPoint EBP, part of the OnPoint A&A Suite powered by CaseWare Cloud, offers an end-to-end solution for performing employee benefit plan audits pursuant to ERISA Section 103(a)(3)(C). This comprehensive solution streamlines the process, from planning to delivery of the auditor's report by providing dynamic engagement tools, links to authoritative guidance, and practical implementation guidance within one product.

OnPoint EBP offers a unique approach to EBP audits, through integration of a comprehensive plan profile feature that functions as a scoping tool to help identify appropriate areas of focus and nuances specific to the plan under audit. The plan profile:

- Helps the auditor gain an understanding of the plan
- Facilitates risk assessment
- Automates drafting of financial statements and note disclosures

Additional features to drive high quality EBP audits include:

- Integrated AICPA methodology and guidance that intelligently builds out the engagement as work progresses
- Integrated diagnostics to indicate when a response warrants additional consideration or when someone chooses a non-standard path
- A guided approach to risk assessment focused on common risks in ERISA Section 103(a)(3)(C) audits



Call 855.855.5CPA or learn more at [CPA.com/OnPointEBP](https://CPA.com/OnPointEBP)





## Improving realization through a dynamic solution

With OnPoint EBP, your firm will experience numerous benefits including:



### **Collaborate in real-time:**

Ensure your team and clients stay connected from anywhere with effective, real-time collaboration in the cloud.



### **Heighten visibility to data:**

Gain a better understanding of year-over-year financial information with preliminary and final analytics.



### **Gain efficiency:**

Enter common data a single time to populate multiple areas in the engagement file, and be alerted to non-standard responses.



### **Improve client communications:**

Personalize and centralize client communications and requests through an integrated cloud approach.



### **Save time:**

Leverage standardized testing templates to expedite testing for every engagement.

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