



Enhancing the efficiency,
quality and value of
preparation, compilation and
review services

OnPoint PCR

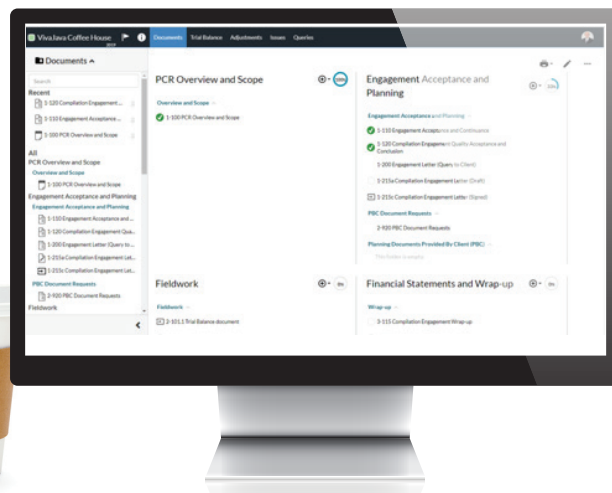
Working on preparation, compilation, and review (PCR) engagements can often be inefficient and time intensive. Today, many firms are manually building out files, struggling with the details around planning engagements, and sifting through guidance, workpapers and procedures trying to determine what is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

Designed to resolve these challenges, OnPoint PCR, part of the OnPoint A&A Suite powered by CaseWare Cloud, offers a truly unique approach to completing PCR engagements. Instead of starting with a substantive set of procedures and checklists that must be pared down for a particular client's situation, OnPoint PCR starts simple, then builds out the engagement file based on the information provided. This innovative use of logic-based methodology helps firms truly optimize engagements, so they are doing exactly what is needed - no more and no less.

Optimize engagement processing using
intelligent checklists.

OnPoint PCR enables firms to enhance engagement quality while being more productive, by offering powerful features including:

- Intelligent checklists which tailor the engagement as it's worked on
- Linked methodology & guidance
- Automatic drafting of reports and letters
- Powerful trial balance import and mapping tools
- PBC document and request management integrated directly into the engagement file
- Disclosure checklist optimization



Call 855.855.5CPA or learn more at CPA.com/OnPointPCR





Achieve high quality results with less effort

Designed to eliminate manual processes and unnecessary steps, OnPoint PCR provides numerous benefits to optimize your services, including:



Comply with Confidence:

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



Simplify Your Workflow with a Clean, Simple Setup:

Instead of having to pare down extensive checklists, start with an easy client acceptance document that will tailor the engagement as you provide the details.



Gain Efficiency with a Single, Consistent Interface:

The solution centralizes the many components of preparation, compilation and review work through a single platform, including: engagement management, linked methodology, PBC document management, and trial balance tools.



Save Time with Automated Report and Letter Drafting:

As you complete work in an engagement, the logic built into OnPoint PCR will update the language on letters and reports to help align deliverables with quality standards.



Safeguard information with a Secure, Robust Platform:

Leveraging CaseWare Cloud, you have an ecosystem designed for A&A services and built to meet security standards in a digital world.

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