



Tax & Accounting

# CCH® ProSystem fx® Engagement

Accounting & Audit

**Recommended by more customers than any other solution on the market, CCH ProSystem fx Engagement puts the power of paperless engagements in your hands. Obtain instant access to paperless audit and tax client binders; promptly prepare financial statements and trial balance reports; and manage all workpapers and lead sheets with no concern of conflicting copies.**

#### **Efficient Collaboration Has Never Been Easier**

CCH ProSystem fx Engagement facilitates teamwork with well-designed tools and processes.

- Allow multiple staff members to work on an engagement at once by checking out only the workpapers you need.
- Be confident you're looking at the most current version of every document by synchronizing work from any location.
- Email an entire binder with one click, or collaborate with customers using CCH Access™ Portal.
- Enjoy compatibility with Microsoft® Office programs.
- Import and integrate trial balance data from virtually any accounting system, including Intuit® QuickBooks®.
- Experience seamless integration with a comprehensive library of footnotes accessible directly from your financial statement.

### Protect Data with Flexible Security Features

Be confident that you're in compliance with regulations by using security features that allow you to:

- Ensure file integrity by securely managing every document from inside the program.
- Avoid unintentional or unauthorized changes by setting access rights for all of your staff groups.
- Obtain secure online sign-offs by preparer and reviewer and lock documents after final review.
- Manage binder and workpaper completion dates to ensure compliance with 45- or 60-day requirements.

### Automate Time Consuming Tasks

Save time and money by simplifying your workflow.

- Automate first-year engagements with customized binder templates.
- Roll forward an entire engagement with a single mouse click.
- Simplify tax return preparation by linking financial data between CCH® ProSystem fx® Tax products and CCH ProSystem fx Engagement, so trial balance updates are reflected automatically in the tax program.

### The Latest Innovations in Paperless Integration

A digital office allows your firm the convenience of instant accessibility to workpapers.

- Store and access engagement binders in a shared file room with a familiar interface.
- Scan documents directly into the correct engagement binder.
- Create PDF files from any application, and seamlessly store them in paperless binders.
- Send files back and forth between CCH® ProSystem fx® Document and share CCH ProSystem fx Engagement workpaper files with customers using CCH Access Portal.

*“CCH ProSystem fx Engagement carries forward workpaper schedules and populates them with the new year’s information, saving time and giving us a much more powerful analytical tool that we can use to support our clients.”*

— Mike Boger,  
Partner,

Breslow Starling Frost Warner Boger Hiatt, PLLC

### Useful Functionality at Every Step

CCH ProSystem fx Engagement helps you deliver more, work more efficiently and stand up to a higher level of accountability. Experience clear advantages, including:

- **Setup** — Add entire teams to binders, and establish individualized security levels through the flexible administration module's simple one-time staff setup.
- **Compile and Organize Data** — Workpapers stored in an intuitive binder system that leverages Microsoft® Word and Excel®, you can effortlessly import, export, email and store PDF files from any application.
- **Collaborate and Review** — Share and synchronize binders from any location, and electronically manage the sign-off process, while simultaneously ensuring that only one person can make changes at a time.
- **Create Reports** — Trial balance data can be linked to other applications so you can easily provide additional services like tax preparation with CCH ProSystem fx Tax, in addition to the multiple financial statements capability.
- **Finalize Binders** — Maximize server space and lock down calculations when you finalize and archive with just a few clicks.
- **Archive Binders** — CCH ProSystem fx Document archives binders with assigned retention periods and indexing, destroying documents once the retention period is reached to ensure proper regulations compliance.
- **Roll Forward** — Automatically populate financial statements and workpapers with current dates, account balances, and variances by rolling data forward from year to year, while still continuing to track the previously assigned staff in the new year.

### A Complete End-to-End Workflow

Wolters Kluwer's integrated suite is designed to work in your everyday, accounting and audit workflow, providing all of the functionality needed to run efficiently and effectively.

- Accounting and audit research
- Workpaper management and trial balance
- Audit preparation and execution
- CPE
- Data analysis
- Adobe® tools
- Knowledge management
- Portals
- Document management

Visit [CCHGroup.com/AA](http://CCHGroup.com/AA), or contact your Wolters Kluwer Account Representative, to learn more about how we can help you provide an even better experience for your clients.

### Required Annual CPE

CCH® Learning & Development Academy — School of Audit offers a proprietary approach that integrates areas including technical tax and accounting knowledge, software training and professional skills into a real-life, hands-on computer experience. Raise the bar on your firm's credentials by trusting an industry leader for all your learning and CPE accredited professional development needs.

*“One of the best rewards of CCH ProSystem fx Engagement is showing it to clients. Clients love the paperless process. We present the system as an electronic filing cabinet and when they see we are sitting in their office with copies of seven years worth of their corporate and personal returns, along with the workpapers on how we made decisions from previous years, they are amazed. That is pretty priceless in its own regard.”*

— James M. Rodola, CPA, CGMA, CITP,  
Principal,  
Viele, Solimano, Swagler & Chapman CPA PC

*“For us, it is just an unbelievable efficiency and productivity enhancement. The software creates all of the forms that we need and provides the detail we need. It saves us time because we don’t manually have to key information.”*

— Laura Sprouse,  
Partner, Firm Administrator,  
Brown Edwards & Co., LLP

