

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

NOTES

Jul. 24, 2019



Wolters Kluwer

Put simply, the [CCH ProSystem fx Engagement Organizer](#) simplifies the process of requesting, receiving and tracking documents and notes between the firm and its clients. Released in November 2018, Engagement Organizer is a new solution that works within CCH ProSystem fx Engagement, which is a key component of the Wolters Kluwer Integrated Audit Approach and is recognized by firms for its:

- Ease of use
- Integrated program/checklists
- Seamless integration with CCH ProSystem fx Suite and CCH Axcess Tax

With the addition of Engagement Organizer, firms can exponentially increase the collaboration and service experience offered to their clients. Historically, firms spent hours continuously requesting documents from clients and organizing them sporadically once received, all while tracking what's still needed from the client for

the audit. The Engagement Organizer provides accounting firms with a “client-

Hello. It looks like you’re using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Additionally, clients of the firm can now easily:

- Upload documents into a secure portal by the date required by the auditor
- Access templates and documents from the auditor that require completion
- Participate in a dialog with their auditor for questions and notes

CCH ProSystem *fx* Engagement Organizer is the only integrated cloud-based request list available in the market that helps facilitate audits through seamless collaboration between firms and their clients

Learn more: <http://news.cchgroup.com/tag/engagement-organizer/>

Demo: <https://support.cch.com/kb/solution.aspx/000064366>

=====

[See all of the winners, finalists and nominees in the 2019 Tax & Accounting Innovation Awards.](#)

Accounting • Auditing

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved