About CaseWare ReviewCompTax

Introducing CaseWare ReviewCompTax, a pure cloud solution that intelligently combines Review, Compilation, and Tax engagements into one workflow. With this, data flows through to financial statements and tax returns alike.

The solution has been securely built for assurance, business services, financial statement preparation, and tax so engagements are completed faster with automated workflows, real-time collaboration, and value-added insights.
Many accounting firms have documented processes in place. Nonetheless, these processes are often scattered as a result of **multiple systems**, a lack of a central monitoring process, and **inefficient** and **disconnected** project management methodology.

**STREAMLINED WORKFLOWS**

Automate manual processes to efficiently complete and manage engagements. Here’s how:

- Combine Review, Compilation, and Tax engagements into one workflow
- Reduce overwork with tailored content and continuous data flow
- Track the entire scope, timeline, and execution of your engagements in real-time
- Flag issues and ensure responsibilities are met on schedule with shared dashboards
Streamline communication processes and collaborate in a secure location to:

- Eliminate the need for multiple email threads
- Securely send, receive, and track communications in one location
- Work simultaneously with colleagues on multiple devices, from anywhere

Disjointed communication is a major source of inefficiency. It leads to disorganization, the need for multiple email threads, and delayed engagement processes due to clogged communication channels.

REAL-TIME COLLABORATION

CaseWare ReviewCompTax eliminates multiple communication channels and delayed approvals.
Accountants have access to **unprecedented volumes of information**. When accessing and using this, however, there is often too much data available to know how to effectively conduct analysis and make interpretations.

**GREATER DATA INSIGHTS**

Within the engagement, CaseWare ReviewCompTax allows you to interpret data and conduct analysis. Now, you’re empowered to:

- Leverage integrated, predefined data analytics for effective analysis and interpretation
- Visually compare data, find anomalies, and discover trends and patterns
- Generate insights with analysis charts that are linked to data throughout the engagement
Improved Collaboration
Work concurrently with clients and colleagues on documents within the engagement file. Using a laptop or tablet, this can be achieved from anywhere.

Seamless Imports
Supports files from CaseWare Working Papers and Microsoft Excel, as well as 50+ desktop and online accounting packages.

Data Continuity
Information used in multiple places throughout the engagement will only need to be entered once and will flow-through the entire engagement in real-time.

Guaranteed Compliance
Using CPA Canada PEG forms*, procedures and documentation are compliant with Canadian standards.

Integrated Client Query System
Complete requests within the query system to create a secure, streamlined process where documents and responses are carried through to the engagement file.

Intelligent Content
Using client data and responses to pre-set questions, online content is tailored to provide only what is relevant for the engagement at hand.

Improved Collaboration
Work concurrently with clients and colleagues on documents within the engagement file. Using a laptop or tablet, this can be achieved from anywhere.

Secure Audit Trail
Requests and engagement information is recorded, tracked, and stored in a user-friendly environment.

Key Features

*A current PEG subscription from CPA Canada is required