

CaseWare RCT



Financials | Review | Compilation | Tax | Guided Workflows
Engagement Letters | PBC | Client Portal | File Storage

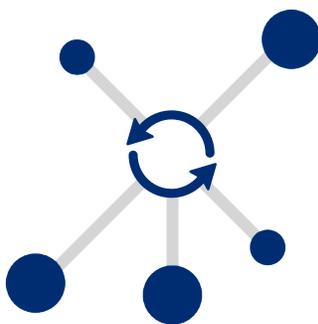
Connecting Data, Workflows, and Results.

The pure cloud solution for Review, Compilation, and Tax intelligently combines these engagements into one workflow. With this, data flows through to financial statements and tax returns alike. The result? Engagements are completed faster with automated processes, real-time collaboration, and value-added insights.



Streamlined Workflow

With checklists specifically designed to tailor each engagement type to your clients' specific needs, ReviewCompTax authors standard content on the fly, ensuring that your team can proceed with the steps relevant to your engagement.



Real-Time Collaboration

With a centralized client portal, communications are securely sent, received, and tracked. This streamlines processes and empowers you to work simultaneously with colleagues on multiple devices, from anywhere.



Acquire Data Insights

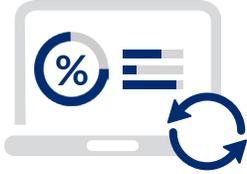
Visually compare data, find anomalies, and discover trends and patterns with integrated, predefined data analytics. Analysis charts display information, allow for value-added testing, and are linked to data throughout the engagement.



CASEWARE®

Key Features

Transparent Engagement Management



Track the entire scope, timeline, and execution of your engagements in real-time using a shared dashboard.

Integrated Client Query System



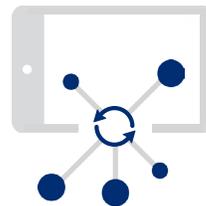
Complete requests within the client portal to create a more secure, efficient communication process. Documents and responses are then carried through to the engagement file.

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.

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.

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.

Guaranteed Compliance



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

*A current PEG subscription from CPA Canada is required

Seamless Data Imports



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

Secure Audit Trail



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

To learn more about the benefits and features of CaseWare ReviewCompTax, or to book a demo, visit caseware.com/ca/reviewcomptax

