



Role-Based Program for New Hire

Overview

Designed to teach the audit basics common to first-year staff, such as professional expectations, understanding the engagement process, field work best practices, industry terminology, and documentation and software skills. Case studies revolve around low-risk audit areas, such as cash, fixed assets and accounts payables in addition to performing a mock inventory observation. Participants will learn to use Wolters Kluwer software tools and functions that complement their newly acquired skills with course content from topics included in CCH® ProSystem *fx*® Engagement Training I (A&A) and CCH® ProSystem *fx*® Knowledge Coach.

Program Description

This 4-day program is designed for new hires fresh out of college to experienced staff, this program will prepare your auditors in the following areas common to first year staff:

- Professional expectations for the public accounting industry and for an entry-level staff.
- Understanding the engagement process, from the necessity of planning and best practices of field work, to efficiently wrapping up an engagement.
- Industry terminology and workpaper preparation and documentation skills.
- Case studies revolving around low-risk audit areas, including, but not limited to, cash, fixed assets and accounts payables.
- Discussions on audit methodology and the new risk assessments requirements.
- Industry leading new user training and tips for CCH ProSystem *fx* Engagement, the basics of Adobe Acrobat® and Microsoft Excel® (with accounting related examples), an introduction to CCH® ProSystem *fx*® ActiveData (data extraction).

Who should attend?

- New Staff / Experienced Staff (0-12 months)

Program Information

- Program Level: Basic
- Prerequisites: None Advanced
- Preparation: None

Recommended CPE

- CPE certificate(s) included

For the 4-day program, you can receive:

- Auditing - 24 hours
- Accounting - 8 hours

Register Now!

Click [here](#) for Regional Locations

[Contact Us >](#)



Role-Based Program for Experienced Staff

Overview

This course covers more advanced and complex material, including such topics as accounts receivable, inventory and debt. Learn how to refine your skills as an auditor by utilizing analytics, as well as looking at more complex ways to use data extraction tools. Plus, experience how work is performed using Wolters Kluwer's audit software products CCH ProSystem *fx* Engagement, CCH ProSystem *fx* Knowledge Coach and CCH ProSystem *fx* ActiveData.

Program Details

Now that your staff members have successfully launched their careers in public accounting, they should be able to effectively complete low-risk sections on their own and understand how everything fits together in the audit and within the firm. This 2-day program moves them into the next phase of their career by auditing more complex areas of a company and understanding more difficult scenarios. Additional topics include:

- Expectations of a developing staff, including taking initiative and asking questions.
- Case studies revolving around increased risk audit areas, including, but not limited to accounts receivable, inventory and debt.
- Obtain and document your understanding and evaluating of the client's business and internal controls.
- Refining your skills as an auditor by utilizing analytics, specifically ratios analytics.
- Introduction to utilizing a data extraction tool, such as CCH ProSystem *fx* ActiveData, to increase your audit efficiency and streamline your sampling and testing procedures.
- Advanced CCH ProSystem *fx* Engagement functionality training, including advanced linking for ratios and classifications, and working with consolidated trial balances.

Who should attend?

- Experienced Staff/New Senior (6-24 months)

Program Information

- Program Level: Basic
- Prerequisites: School of Audit New Hire Training or equivalent experience
- Advanced Preparation: None

Recommended CPE

- CPE certificate(s) included

For the 2-day program, you can receive:

- Auditing - 14 hours
- Accounting - 2 hours

Register Now!

Click [here](#) for Regional Locations

[Contact Us >](#)



Role-Based Program for Senior

Overview

Designed for seniors with in-charge responsibilities, our in-depth topics include keys to success for the roles of engagement field leader, on-the-job trainer, mentor, task manager, and efficient and effective auditor. This course covers how to plan an audit, perform risk assessment and design audit procedures that respond to risks, as well as reviewing, drafting financial reporting, and collaboration tools. All work is performed using Wolters Kluwer's audit software products CCH ProSystem *fx* Engagement, CCH ProSystem *fx* Knowledge Coach and CCH ProSystem *fx* ActiveData.

Program Details

Congratulations to your staff on their promotion to senior! A senior or in-charge can mean different things from firm to firm. This 2-day ensures your seniors have what they need to successfully fulfill this role and eventually move into an area of greater responsibility. Investing in your seniors, the core of any audit firm's workforce, is critical to gaining (and maintaining) a competitive edge in this challenging market.

Our in-depth topics include:

- Keys to success for an engagement field leader, on-the-job trainer, mentor, task manager, and efficient & effective auditor.
- How to plan an audit, including assessing risk and designing substantive procedures in response to assessed risks.
- Identify opportunities where data extraction using CCH ProSystem *fx* ActiveData and non-statistical sampling can shave time off a job without reducing risk.
- Effective reviewing and financial statement drafting techniques, including collaboration tools and advanced linking, utilizing CCH ProSystem *fx* Engagement.
- Reviewing workpapers and financial statements as part of concluding the audit.

Who should attend?

- New Seniors/Experienced Seniors (18-36 months)

Program Information

- Program Level: Intermediate
- Prerequisites: School of Audit New Hire and Experienced Staff training or equivalent experience
- Advanced Preparation: None

Recommended CPE

- CPE certificate(s) included

For the 2-day program, you can receive:

- Auditing - 14 hours
- Accounting - 2 hours

Register Now!

Click [here](#) for Regional Locations

[Contact Us >](#)



Role-Based Program for Experienced Senior

Overview

Designed for seniors who already have in-charge responsibilities, the purpose of this course is to prepare your staff for researching, understanding, documenting and developing techniques to present the results of your accounting research for some of the most complex audit areas. All work is performed using Wolters Kluwer's audit software products CCH ProSystem *fx* Engagement, CCH ProSystem *fx* Knowledge Coach and CCH® Accounting Research Manager®.

Program Details

A senior or in-charge can mean different things from firm to firm. This two-day course ensures your experienced seniors have what they need to successfully fulfill their expanded role with the firm. Investing in your seniors, the core of any audit firm's workforce, is critical to gaining (and maintaining) a competitive edge in this challenging market. Our in-depth topics include:

- Understand expectations of an experienced senior.
- Learn how to conduct accounting research using CCH Accounting Research Manager and write an effective technical memo.
- Understand the basics of auditing areas that are considered more complex, including stock-based compensation, derivatives and fair value measurements and disclosures.
- Understand and evaluate passed adjusting journal entries.
- Develop professional presentation skills.

Who should attend?

- Experienced Seniors (24-36 months)

Program Information

- Program Level: Intermediate
- Prerequisites: School of Audit New Hire, School of Audit Experienced Staff and School of Audit Senior training or equivalent experience
- Advanced Preparation: None

Recommended CPE

- CPE certificate(s) included

For the 2-day program, you can receive:

- Auditing - 13 hours
- Professional Development – 3 hours

Register Now!

[Contact Us >](#)



Specialty Program for Knowledge-Based Audit

Overview

The risk assessment standards place greater importance on understanding the business and its controls, and on auditing effectively. This program dives into the risk assessment standards and how your firm can change and adapt to meet these requirements utilizing the Knowledge-Based Audit (KBA) approach. This session uses KBA documents via Wolters Kluwer's CCH Accounting Research Manager and CCH ProSystem *fx* Knowledge Coach.

Program Description

With the constant change facing the audit industry, your staff members are only as good as their leaders in auditing efficiently and effectively. The additions of the risk assessment standards have placed greater importance in understanding the business, its controls, and in auditing effectively. The old days of full substantive audits and referring to prior year's workpapers are in the past. This 2-day program dives into the risk assessment standards and how your firm can change and adapt to meet these requirements utilizing the Knowledge-Based Audit (KBA) approach. This session is beneficial for those using the KBA documents via CCH Accounting Research Manager and CCH ProSystem *fx* Knowledge Coach. Areas covered include:

- Understanding the basics of the KBA methodology and CCH ProSystem *fx* Knowledge Coach.
- Components of the KBA, including the Communication Hub, and how the various programs and checklist flow in the methodology.
- Understanding the entity and its environment, including assessing risk and materiality utilizing the KBA.
- Best practices for implementation of the KBA approach.
- Considerations for audits of small businesses. Testing the operating effectiveness of internal controls.
- Tips for substantive testing from Wolters Kluwer's Audit Procedures.

Who should attend?

- Experienced Staff, up to Partners (6+ months)

Recommended CPE

- CPE certificate(s) included

For the 2-day program, you can receive:

- Auditing - 16 hours

Register Now!

Click [here](#) for Regional Locations
[Contact Us >](#)