

# WHAT'S NEW

## Checkpoint Engage™ PCR (Preparation Compilation and Review)

This document provides new and updated items that were included in each release of Checkpoint Engage™ PCR (Each product requires a separate license.)

Checkpoint Engage™ product support email: [checkpointengage.support@thomsonreuters.com](mailto:checkpointengage.support@thomsonreuters.com)

Documentation available on our Checkpoint Engage™ Customer Help Center:

<http://support.checkpoint.thomsonreuters.com>

AdvanceFlow™ product support email: [afsupport@tr.com](mailto:afsupport@tr.com)

GoFileRoom product support email: [gfrsupport@tr.com](mailto:gfrsupport@tr.com)

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# 2019 Release Information

## October 2019

### Checkpoint Engage General Application

#### New Audit Program Completion View Multi-Window

For new engagements, you can now view multiple audit programs (AP) simultaneously. Simply open the Audit Program and select "Completion View" button on the Design View and your workpaper will open in a pop-out window. Engagements created prior to this release will not have access to multi-view functionality.

#### New Design Workpaper

To help you quickly access audit programs and procedures checklists in Design View directly, a new "Design Workpaper" has been added to several Risk and PCR titles. For Risk engagements, the Design Workpaper is called "AP-0.1: Audit Program Design." For PCR engagements, the Design Workpaper is called "CX-0.1: Procedure Design." For new engagements and eligible titles, this new workpaper appears in the binder tree before the first Audit Program or Procedures Checklist.

This initial release provides the new Design Workpaper for the following Risk/PCR titles:

Title	CPT Acronym	Checkpoint Engage Product
FSP 2019	OPSDQ	Checkpoint Engage for SSARS Preparation Engagements
CON 2019	OPCNQ	Checkpoint Engage for Construction Contractors
ASB 2019	OPBSQ	Checkpoint Engage for Audits of Nonpublic Companies
ASB 2018	OPBSQ	Checkpoint Engage for Audits of Nonpublic Companies
PCA 2018	OPASQ	Checkpoint Engage for PCAOB Audits
OFS 2018	OPCTQ	Checkpoint Engage for Cash, Tax, and Other Bases of Accounting

We continue to build the Design Workpaper into additional titles and will eventual be included in the full portfolio of titles.

If you create new engagement for a title that does not have the new Design Workpaper, you can still open multiple APs at the same time. However, selecting the "Design View" button on the AP will launch in the same window, rather than in a new window.

When you roll-forward or import an engagement that has been updated for the new Design Workpaper, the application will automatically include the Design Workpaper in your engagement binder.

The "Default View" setting has been removed from the Audit Program. Audit programs will open in Completion View by default.

## Risk Assessment Module

### CX-7.1 - Combined Risk Assessment Summary Form

We have added a Combined Risk Assessment Summary form to provide a convenient way to assess risk for all audit areas on one form. As you set up the audit, you'll receive the option to use the CX-7.1-Combined Risk Assessment Summary Form for the engagement.

Multuser rules to consider when using Combined Risk Assessment Summary form:

- When you're editing the Combined Risk Summary Assessment Form, other users will not be able to edit the following: all audit programs, Identified risk pane, CX-10.1.2 of the Internal Control module.
- When you're editing any audit area related audit program, other users will not be able to edit the Combined Risk Assessment Form and the Identified Risk pane.
- When you're editing CX-10.1.2 of the internal control module, additional users will not be able to edit the Combined Summary Form, audit area programs or risks in the Identified Risk pane.
- When you're editing the Combined Risk Summary Form, other users will not be able to edit CX-10.1 of the internal control module.

You have the option to toggle back-and-forth between the Combined Risk Assessment Summary Form and individual Audit Area Risk Assessment Summary forms using the 'Edit Engagement' wizard. When Engagement Setup is changed to select a different type of risk assessment summary form (i.e., you switch from individual to combined form or vice versa):

- All previously entered responses will transfer from one form type to the other. However, when switching from individual risk assessment summary forms to the combined risk assessment summary form, any comments entered at the bottom of the individual forms will be combined and displayed in the comment box at the bottom of the combined form. Conversely, when switching from the combined form to individual forms, the comments from the combined form will only be listed on first CX-7.n individual form.
- Any risk assessment summary forms marked as finalized will become unfinalized.
- If you change from individual risk assessment summary forms to the combined form, any workpaper reference links to the individual forms that you've inserted in audit programs and/or text boxes will change to reference the combined form. Conversely, if you change from the

combined form to individual forms, existing workpaper reference links to the combined form will remain but will convert to plain text and not be actionable links.

## Checkpoint Engage PCR Module

- **Checkpoint Engage PCR** – our Preparation, Compilation, and Review module has been updated for use with the following additional titles:

Title	CPT Acronym	Checkpoint Engage Product	PCR Engagement Type and Subtype	Supported CE Modules
FSP 2019	OPSDQ	Checkpoint Engage for SSARS Preparation Engagements	Financial Statement Preparation	PCR

## September 2019

### Checkpoint Engage PCR – Commercial Release

- With Checkpoint Engage PCR you can create preparation, compilation and review engagements and templates by selecting one of the engagement types\subtypes using the Create Engagement wizard.
- PCR engagement types will appear in the Create Engagement wizard dropdown based upon your user license.
  - Compilation
    - Financial Statement
    - Specified Element, Account or item of a Financial Statement
    - Prescribed Form
  - Review
    - SSARS
    - SAS
    - PCAOB
  - Financial Statement Preparation
- Once engagement type/subtype selection is made you will then select the PCR-enabled title you've subscribed to.

### PCR titles made available with this release:

Title	CPT Acronym	Checkpoint Engage Product	PCR Engagement Type and Subtype	Supported CE Modules
AET 2018	OPETQ	Checkpoint Engage for Accounting and Reporting for Estates and Trusts	Compilation <ul style="list-style-type: none"> <li>• Financial Statement</li> </ul> Financial Statement Preparation	PCR

PHY 2018	OPPOQ	Checkpoint Engage for Physicians and Other Health Care Professionals	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul>	PCR Disclosure
RST 2018	OPSTQ	Checkpoint Engage for Restaurants and Bars	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> </ul>	PCR Disclosure
FSP 2018	OPSDQ	Checkpoint Engage for SSARS Preparation Engagements	Financial Statement Preparation	PCR

### PCR title re-released to address bugs:

Title	CPT Acronym	Checkpoint Engage Product	PCR Bugs Fixed
NPO 2019	OPNPQ	Checkpoint Engage for Audits of Nonprofit Organizations	<ol style="list-style-type: none"> <li>A filter question was tagged incorrectly, so the incorrect procedures were being added/removed for the question response. This tag was corrected.</li> <li>Footnotes were missing from NPO-CR-2 form. This missing content is now present on the form.</li> </ol>

## August 2019

### Checkpoint Engage PCR – Pre-commercial Release

#### PCR titles available with release:

Title	CPT Acronym	Checkpoint Engage Product	Engagement Type and Subtype
OFS 2018	OPCTQ	Checkpoint Engage for Cash, Tax, and Other Bases of Accounting	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> <li>Specified Element, Account or Item of a Financial Statement</li> <li>Prescribed Form</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> </ul>
EBP 2018	OPEBQ	Checkpoint Engage for Audits of Employee Benefit Plans	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul>
EBP 2019	OPEBQ	Checkpoint Engage for Audits of Employee Benefit Plans	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul>
DLR 2018	OPDLQ	Checkpoint Engage for Dealerships	Compilation

			<ul style="list-style-type: none"> <li>Financial Statement</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> </ul>
HOA 2018	OPHAQ	Checkpoint Engage for Homeowners' Associations	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> <li>SAS</li> </ul>

## July 2019

### Checkpoint Engage PCR – Pre-commercial Release

- Initial pre-commercial release allows you to create preparation, compilation and review engagements and templates by selecting one of the engagement types\subtypes using the Create Engagement wizard.

#### PCR titles available with release:

Title	CPT Acronym	Checkpoint Engage Product	Engagement Type and Subtype
CAR 2018	OPCRQ	Checkpoint Engage – Compilation and Review Engagements	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> <li>Specified Element, Account or Item of a Financial Statement</li> <li>Prescribed Form</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> </ul>
ASB2018	OPBSQ	Checkpoint Engage – Audit of Nonpublic Companies	Review <ul style="list-style-type: none"> <li>SAS</li> </ul>
ASB 2019	OPBSQ	Checkpoint Engage – Audit of Nonpublic Companies	Review <ul style="list-style-type: none"> <li>SAS</li> </ul>
PCA 2018	OPASQ	Checkpoint Engage – PCAOB Audits	Review <ul style="list-style-type: none"> <li>PCAOB</li> </ul>
NPO 2018	OPNOQ	Checkpoint Engage for Audits of Nonprofit Organizations	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul> Review <ul style="list-style-type: none"> <li>SSARS</li> </ul>
NPO 2019	OPNOQ	Checkpoint Engage for Audits of Nonprofit Organizations	Compilation <ul style="list-style-type: none"> <li>Financial Statement</li> </ul>

			Review <ul style="list-style-type: none"> <li>• SSARS</li> </ul>
CON 2018	OPCNQ	Checkpoint Engage for Construction Contractors	Compilation <ul style="list-style-type: none"> <li>• Financial Statement</li> </ul> Review <ul style="list-style-type: none"> <li>• SSARS</li> </ul>