

Effective Workpaper Techniques: Building a Better Workpaper (EWTB)

Course Overview

The challenge: create dynamic workpapers that reflect a high level of clarity, competence and compliance that also showcase your individuality and excellence. Build an understanding of the purpose for creating workpapers and the fundamental elements you need to prepare, document and maximize the potential of each workpaper. You'll also harness the advantages of software technologies to power your workpapers for years to come in a paperless environment.

Objectives

- Determine software technologies to make your workpapers more effective and efficient.
- Recognize concepts that result in effective workpapers.
- Identify basic standardization techniques for better organization.
- Determine necessary skills and knowledge to determine appropriate workpaper content in accordance with professional standards.
- Recognize the legal implications of workpapers.
- Identify how to improve your documentation for peer reviews and PCAOB reviews.

Major Topics

- Effectiveness and efficiency
- Leveraging Excel to create a more powerful, efficient and fluid workpaper
- Constructing an effective workpaper through form, function, appearance and content
- Elements to make a workpaper stand-alone
- Paperless concepts
- Differences between workpapers for industry, audit and tax accountants
- Who gets a copy of my workpapers? Are clients entitled?
- Legal consequences associated with workpaper content
- Documentation in accordance with attestation standards
- Documentation for a peer review or PCAOB review

Field of Interest Code: Auditing

CPE Hours: 8.00 | AA: 8.00

Level: Basic

Designed for:

Experienced and emerging CPAs and professionals who would like to refresh, refine or develop their workpaper and documentation skills through the use of software technologies in a paperless environment to comply with professional standards.

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