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Collaborate, OnPoint AnalyticsAI, and OnPoint EBP – to aid growth-minded firms in improving efficiency, building trust and delivering insights to ...

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The American Institute of CPAs and its subsidiary, CPA.com, are going to expand their OnPoint family of products built on the CaseWare Cloud platform. Three standalone solutions will be added to the OnPoint A&A Suite – OnPoint Collaborate, OnPoint AnalyticsAI, and OnPoint EBP – to aid growth-minded firms in improving efficiency, building trust and delivering insights to clients.

Driven by artificial intelligence and data analytics, the OnPoint A&A Suite offers CPA firms secure, streamlined collaboration with clients, automated data acquisition, transaction testing of general and sub-ledger activity, and standardized, out-of-the-box engagement templates. AICPA guidance and methodology are embedded throughout the suite's solutions, providing a seamless experience for users.

“AI data-driven analytics are transforming the value that CPA firms can deliver to clients,” said Erik Asgeirsson, president and CEO of CPA.com. “We are seeing the reinvention of all major practice areas, from assurance to tax planning to client

accounting services. The expanded OnPoint Suite will give CPAs new tools to

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- **OnPoint Collaborate** – A robust firm and client collaboration solution for document gathering, which eliminates the need for less-secure email communications when exchanging information. OnPoint Collaborate simplifies the “provided by client” (PBC) document collection process and provides ready-made PBC templates and a secure, centralized location to store client files and manage document requests. This capability already generates queries for client documents within OnPoint PCR, making it a powerful tool for connecting CPAs to their clients. OnPoint Collaborate also integrates with CaseWare Working Papers.
- **OnPoint AnalyticsAI** – A customizable tool that uses data analytics to determine risk in transactions reviewed within an engagement. OnPoint AnalyticsAI automates data acquisition and uses artificial intelligence to better identify anomalies and risk across entire data sets, driving powerful insights for auditors. Multiple tests can be run on transactions automatically, and the type of tests can be configured based on the type of review.

The OnPoint A&A Suite will also soon include OnPoint EBP, a module for employee benefit plan audits performed under ERISA Section 103(a)(3)(C). As with OnPoint PCR, key features will include tailored inquiries and document requests, intelligent templates, status tracking in real-time and embedded AICPA guidance and methodology. OnPoint EBP will also include diagnostics and standardized testing templates to help firms improve quality with less effort.

“Our partnership with AICPA and [CPA.com](https://www.cpa.com) is allowing our organizations to deliver solutions that answer the demands of firms large and small,” said Ross Hampton, CaseWare’s head of marketing and sales. “The CPA profession is experiencing unprecedented change, and the CaseWare Cloud platform that powers the OnPoint suite is driving this transformation through innovative offerings that meet the demands of the profession.”

The OnPoint A&A Suite is part of a broader effort to evolve auditing for the

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