

CCH® Engagement

CPA Engagement Templates

Download and Technical Information

This document provides important information relating to the CPA Engagement Templates. Please review this document carefully prior to installation. Should you have any questions, please contact our Support Centre at 1-800-268-4522 or register to our Support Platform at <https://support.cch.com/oss/canada> and [submit a support ticket](#).

Version Support

Note that the CPA PEG Engagement Templates are only supported on the latest version of the *CCH® Engagement* software program. For more information, please contact our Support Centre at 1-800-268-4522 or register to our Support Platform at <https://support.cch.com/oss/canada> and [submit a support ticket](#).

Downloading from the Internet

To download the new version, proceed as follows:

1. Access the [Download Centre](#).
2. Type your username and password in the **Login** section and click **Log in**.
3. In the **Dashboard** page, click the **Files Centre** button in the **Download** section.
4. In the **CCH Accountants' Suite** section, click **CCH Engagement Templates**.

You will then be able to download the new version of the *CPA Engagement Templates* and the related documentation. We recommend that you save the files to a temporary location on your workstation. Please take note of your activation key, which is displayed in the **Master Activation Key** section, as you will need it during the installation.

If you need assistance to retrieve your username and password, contact Customer Service at 1-800-268-4522 or register to our Support Platform at <https://support.cch.com/oss/canada> and [submit a support ticket](#).

Important:

If a previous version is already installed, the setup program will automatically update your program and install it in the following default directory: C:\Pfx Engagement\WM.

If no previous version is already installed, your program will be installed in the following default directory: C:\Program Files (x86)\Pfx Engagement\WM.

The setup program will install the template files into the following subfolders of the selected destination: \Binder templates and \Workpaper templates.

If you install the templates to a different location, such as a network folder, please make sure it matches the location defined for the binder and workpaper templates in your *CCH Engagement* configuration (**Tools/Options/Templates**).

The setup program will add an icon named **CPA PEG 2023 Engagement Templates** to the Control Panel/Add or Remove Programs. You can use this option to remove the templates at a later date, if necessary. However, this procedure will not remove converted templates.

Note: If you already have a prior version of the templates installed, running this setup will not replace these templates, but will simply add a new set of templates to your program.

If this is not your first installation of the templates, we also suggest that you refer to the section entitled **Define the roll forward settings for the updated CPA workpapers.**

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Using the Binder and Workpaper Templates

To create a new binder based on a CPA binder template, proceed as follows:

1. Right-click a client in your file room, then select **New Binder Wizard**.
2. In the **Select Source for the Binder** dialog box, select **Create binder from template** to select a source for the binder.
3. Click the **CPA Binders** tab to select the desired binder template.

To create a new workpaper based on a CPA workpaper template, proceed as follows:

1. Right-click a tab within an existing binder, then select **New Workpaper from Template**.
2. Click the tab that best represents the workpapers you want to work with (e.g. **CPA PEG 2023 Workpapers** tab), then select a file from the list and click **OK**.

Note: You can type the document number in the list to quickly scroll to the desired document.

Define the roll forward settings for the updated CPA workpapers

Please refer to the list of changes for the list of all documents that were updated in the **CPA PEG 2023**.

Option A - Set Roll Forward Options in Workpaper Properties

1. Right-click the checklist or letter to be replaced and select **Properties** from the menu.
2. On the **Roll Forward** tab (figure 1-1) select the **Replace in the roll forward with this file** radio button.
3. Click the **Browse** button and browse to the CPA PEG 2023 Workpapers folder which contains the updated checklists and letters.

Note: To verify the location of the CPA PEG 2023 Workpapers folder, select **Options** on the **Tools** menu from the *CCH Engagement* File Room and click the **Templates** tab. The CPA PEG 2023 Workpapers folder is contained within the Workpaper Templates path as depicted in figure 1-2.

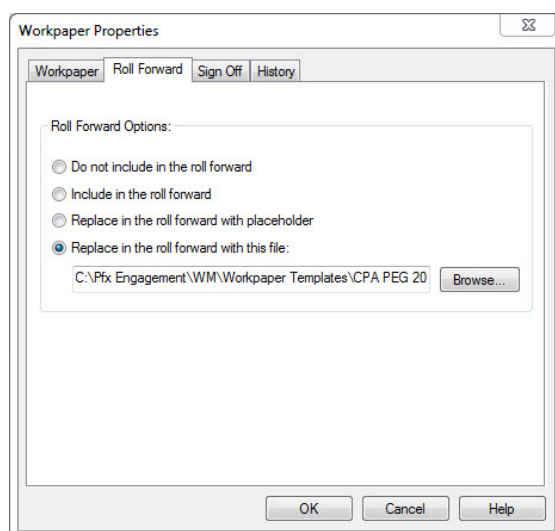


Figure 1-1

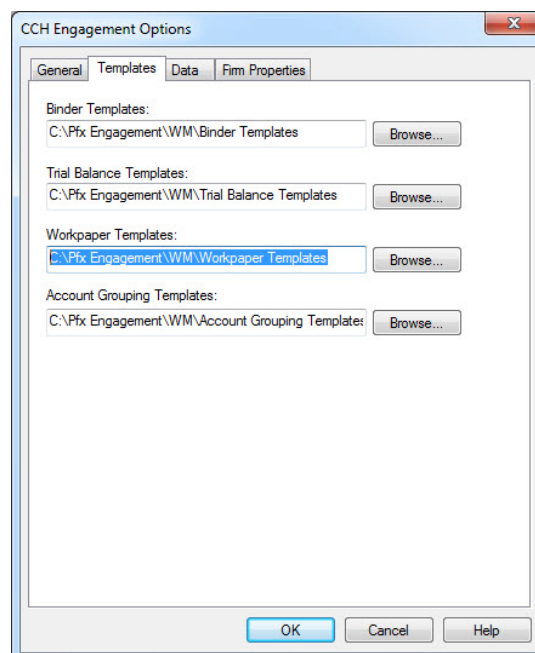


Figure 1-2

4. Select the updated checklist or letter in the CPA PEG 2023 Workpapers folder and click the **Open** button followed by the **OK** button. Upon rolling forward the binder, the checklist or letter will automatically be replaced.
5. Repeat steps 1 to 4 for all the checklists or letters that need to be replaced.

Option B - Set Roll Forward Option during Roll Forward

1. The roll forward options of the PEG checklists and letters can also be determined when rolling forward a *CCH Engagement* binder (right-click the binder from the File Room and select **Roll Forward Binder**).
2. When completing the roll forward, select the checklist or letter to be updated by clicking them and clicking the **Modify** button. (Figure 1-4)

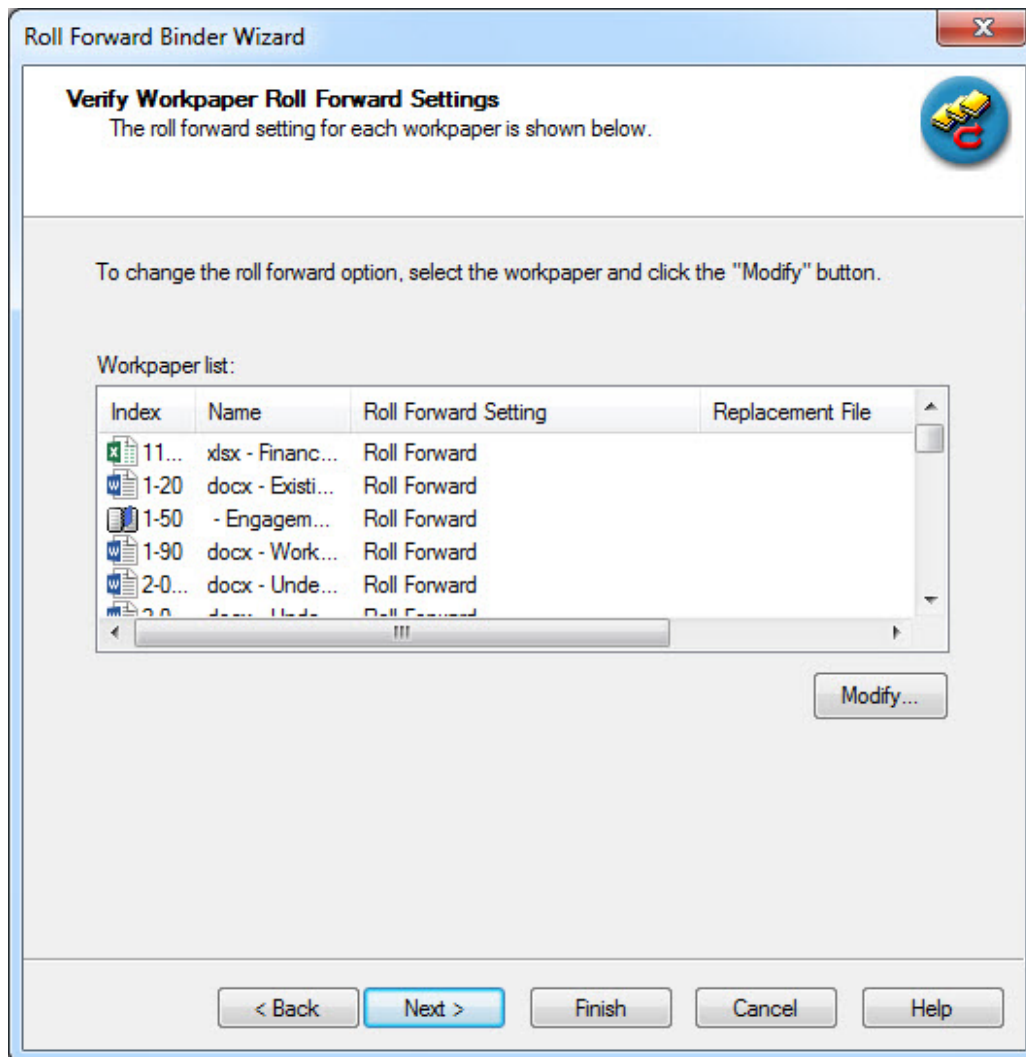


Figure 1-4

3. On the **Roll Forward** tab (figure 1-1) select the **Replace in the roll forward with this file** radio button.
4. Click the **Browse** button and browse to the CPA PEG 2023 Workpapers folder which contains the updated checklists and letters.

Note: To verify the location of the CPA PEG 2023 Workpapers folder, select **Options** on the **Tools** menu from the *CCH Engagement* File Room and click the **Templates** tab. The CPA PEG 2023 Workpapers folder is contained within the Workpaper Templates path as depicted in figure 1-2.

5. Select the updated checklist or letter in the CPA PEG 2023 Workpapers folder and click the **Open** button followed by the **OK** button. Upon rolling forward the binder, the checklist(s) or letter(s) will automatically be replaced.
6. Repeat steps 2 to 5 for all the checklists or letters that need to be replaced.
7. Once the Roll Forward settings are defined for all checklists or letters click **Next**. Upon rolling forward the binder, the checklist(s) or letter(s) will automatically be replaced.