



LEVEL ONE

New Hire Training



MODULE INFORMATION

Program Duration	Variable
Prerequisite	0-1 Year Professional Exp.
Level of Instruction	Basic
Delivery Method	Group Live Group Internet Blended Learning
CPE Credits	24 hours
Auditing (Aud) – 21 Communications & Marketing (Comm) – 2 Personal Development (PD) – 1	
Advanced Preparation	None

LEARNING OBJECTIVES

- Describe the general audit process including the gathering of information, uses of risk assessments, performance of procedures, and the reporting process.
- Perform and document common basic audit procedures such as vouching, tracing, confirming, inspecting, and observing.
- Take instruction and complete common tasks and audit procedures in areas often assigned to newer associates such as cash, accounts payable, inventory, and accounts receivable.

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LEVEL ONE SUMMARY

New Hire Training is designed for individuals with limited practical experience on audits. The program provides critical skill training for new associates related to performing and documenting audit procedures. The program addresses the skills by examining and practicing audit procedures in the common audit areas assigned to newer associates. Utilization of the accounting records from a real small business creates a realistic simulation in the classroom. The program also provides training on certain key foundational skills necessary to be successful in the profession.

MODULE SUMMARY

Audit Knowledge and Skills	10 hours
<ul style="list-style-type: none"> • Role of the New Hire (AUD 1) • 2021 Audit Issues (AUD 1) • Audit Procedures (Aud 2) • Audit Process (Aud 2) • Risk Assessment Procedures & Walkthroughs (Aud 2) • Preparing Audit Documentation (Aud 2) 	
Auditing Simulation	11 hours
<ul style="list-style-type: none"> • Accounts Payable (Aud 2) • Accounts Receivable (Aud 2) • Cash (Aud 3) • Inventory (Aud 2) • Property, Plant & Equipment (Aud 2) 	
Foundational Skills	3 hours
<ul style="list-style-type: none"> • Listening Skills (Comm 2) • Professionalism (PD 1) 	



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MODULE INFORMATION

Program Duration **Variable**

Prerequisite **6-18 Mos. Professional Exp.**

Level of Instruction **Basic**

Delivery Method **Group Live
Group Internet
Blended Learning**

CPE Credits **24 hours**

Auditing (Aud) – 22
Communications & Marketing (Comm) – 1
Business Ethics (BE) – 1

Advanced Preparation **None**

LEARNING OBJECTIVES

- Apply basic risk assessment procedures, including updating and validating cycle level control documentation and entity understanding.
- Effectively perform basic audit procedures such as analytical procedures, sampling and fraud procedures, and address specific areas such as valuation of receivables, accounting for leases, and revenue.
- Gather and share information with the client and audit team, and demonstrate appropriate and ethical decision making.

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LEVEL TWO

Staff Training

LEVEL TWO SUMMARY

Staff Training is designed for staff accountants with one busy season of experience. This program includes significant content targeted for tasks and procedures performed by the more experienced staff person on the engagement. Topics include updating internal control documentation, performing walkthroughs, sampling techniques, valuation testing for accounts receivable and data analytics. In addition, the program provides skill training on select key foundational skills necessary for success in the public accounting profession.

MODULE SUMMARY

Audit Knowledge and Skills **19 hours**

- Role of Audit Staff (AUD 1)
- 2021 Audit Issues (AUD 1)
- Risk Based Auditing (Aud 1)
- Substantive Analytical Procedures (Aud 2)
- Audit Process (Aud 2)
- Fraud (Aud 2)
- Understanding and Documenting Internal Controls (Aud 2)
- Understanding the Entity (Aud 2)
- Substantive Sampling (Aud 2)
- Introduction to Data Analytics in the Audit (Aud 3)
- Beyond the Basics (Aud 1)

**Accounting and Auditing
of Financial Statement Areas** **2 hours**

- Accounts Receivable (Aud 2)

Foundational Skills **3 hours**

- Performing Effective Inquiries (Comm 1/Aud 1)
- Business Ethics (BE 1)



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LEVEL THREE

New In-Charge Training



MODULE INFORMATION

Program Duration	Variable
Prerequisite	2+ Yrs. Professional Exp.
Level of Instruction	Intermediate
Delivery Method	Group Live Group Internet Blended Learning
CPE Credits	24 hours
Auditing (Aud) – 18 Personal Development (PD) – 4 Management Services (MS) – 2	
Advanced Preparation	None

LEARNING OBJECTIVES

- Supervise, complete, or contribute to all required risk assessment procedures.
- Evaluate the design effectiveness of a client’s activity level controls.
- Design, perform, and supervise the performance of key audit procedures, tests of controls and analytical procedures, including appropriate use of data extraction software.
- Manage audit fieldwork, including organizing the project and supervising team members.

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LEVEL THREE SUMMARY

New In-Charge Training is designed for individuals transitioning to the role of Senior or In-Charge on the audit engagement team. This program includes significant content on the audit process, data analytics, project management, supervision, and file review to prepare the participant for in-field leadership responsibilities. The program includes significant technical content related to evaluating activity level controls, assessing and responding to risk and performing tests of controls. This program will challenge participants to put the audit process together and step into a more advanced role on the audit team.

MODULE SUMMARY

Audit Knowledge and Skills 16.5 hours

- Role of the In-Charge (AUD 1)
- 2021 Audit Issues (AUD 1)
- Developing Expectations for Analytical Procedures (Aud 2)
- Reviewing Audit Documentation (Aud 2.5)
- Audit Process & Understanding the Entity (Aud 1.5)
- Evaluating Activity Level Controls (Aud 2)
- Risk Assessment (Aud 1.5)
- Responding to Risk (Aud 1)
- Control Testing (Aud 1.5)
- Remote Auditing Procedures (Aud 2)

Foundational Skills 7.5 hours

- Project Management (MS 2)
- Supervision Styles & Providing Feedback (Aud 2)
- Time Management & Organization (PD 2)
- Teaching & Delegating (PD 2)



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LEVEL FOUR

Experienced In-Charge Training



LEVEL FOUR SUMMARY

Experienced In-Charge Training is designed for individuals with experience as the in-field leader. The program is designed to advance the skills and effectiveness of participants. The program addresses more advanced audit process steps, such as evaluating management, and setting and responding to financial statement level risks, including those created from a lack of entity level controls. The program challenges participants to create custom responses to the risks on their engagements. The program provides a variety of training related to technical accounting and auditing topics. In addition, the program provides robust research based content related to supervising for effective and efficient performance.

MODULE INFORMATION

Program Duration	Variable
Prerequisite	3+ Yrs. Professional Exp.
Level of Instruction	Intermediate
Delivery Method	Group Live Group Internet Blended Learning
CPE Credits	24 hours
Accounting (Acct) – 2 Auditing (Aud) – 17 Communications & Marketing (Comm) – 4 Personal Development (PD) – 1	
Advanced Preparation	None

MODULE SUMMARY

Audit Knowledge and Skills 15 hours

- Role of the Senior (AUD 1)
- 2021 Audit Issues (AUD 1)
- Estimates (Aud 2)
- General Technology Controls (Aud 2)
- Changes to Audit Reporting (Aud 2)
- Case Study in Risk Assessment (Aud 4)
- Planning for Efficient, Quality Audits (Aud 2)

Accounting and Auditing of Financial Statement Areas 2 hours

- ASC 606: Revenue Recognition Issues (Acct 2)

Foundational Skills 7 hours

- Supervising & Motivating Team Members (Aud 2)
- Communicating Within and Across Teams (Comm 2)
- Creating Business Presentations (Comm 2)
- Mentoring for the Future (PD 1)

LEARNING OBJECTIVES

- Evaluate the design effectiveness of a client’s entity level and technology controls.
- Design custom audit programs to respond to assessed risks.
- Address challenging accounting and auditing issues in areas such as revenue recognition, accounting estimates.
- Assess self and other individuals’ motivation and personal style for leading and communicating.
- Practice delivering a business presentation.

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LEVEL FIVE

Supervisor Training



MODULE INFORMATION

Program Duration	Variable
Prerequisite	4+ Yrs. Professional Exp.
Level of Instruction	Intermediate
Delivery Method	Group Live Group Internet Blended Learning
CPE Credits	16 hours
Accounting (Acct) – 2	
Auditing (Aud) – 10	
Personal Development (PD) – 4	
Advanced Preparation	None

LEARNING OBJECTIVES

- Design efficient and effective audit programs to respond to identified risks.
- Address challenging auditing issues in areas such as fair value, interim procedures, and internal control testing.
- Increase effectiveness of interactions with clients and the team through consideration of conflict management and supervisory approaches.
- Describe and apply key concepts in ASC Topic 842.

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LEVEL FIVE SUMMARY

Supervisor Training is designed to advance the skills of experienced in-field auditors and begins the development of management level skills. This two-day program provides training in audit technical areas, as well as foundational skills essential for leading teams. The blend of skills and technical topics makes this a valuable program for continued growth in the profession.

MODULE SUMMARY

Audit Knowledge and Skills 8 hours

- Role of the Supervisor (AUD 1)
- 2021 Audit Issues (AUD 1)
- Designing Risk-Based Audit Procedures (Aud 2)
- Interim Procedures, Including Internal Control Testing (Aud 2)
- Auditing Fair Value & Using the Work of a Specialist (Aud 1)
- Digital Strategy for Audit Leadership (Aud 2)

Accounting of Financial Statement Areas.....2 hours

- Case Study in Accounting for Leases (Acct 2)

Foundational Skills.....6 hours

- Providing Written & Verbal Feedback (Aud 2)
- Conflict Management (PD 2)
- Creative Problem Solving (PD 1)



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LEVEL SIX

Manager Training



LEVEL SIX SUMMARY

Manager Training is designed for individuals who have recently transitioned or are preparing to transition to a managerial role. This two-day program contains technical auditing topics, with a focus on communicating findings and issues with the client, reviewing recent inspection report findings and data analytics. The program also contains content related to key foundational skills necessary to function as a manager within the public accounting profession.

MODULE SUMMARY

Audit Knowledge and Skills.....6.5 hours

- Role of the Manager (AUD 1)
- 2021 Audit Issues (AUD 1)
- Learning from Inspection Reports (Aud 2)
- Impact of Technology in Accounting and Auditing (Aud 2)

Evaluating & Communicating Results.....2 hours

- Results of Substantive Audit Procedures (Aud 1)
- Uncorrected Misstatements & Control Deficiencies (Aud 1)

Foundational Skills.....7.5 hours

- Time Management and Organization (PD 2)
- Leadership and Management (PD 2)
- Project Management (MS 2)
- Business Development (PD 2)

MODULE INFORMATION

Program Duration	Variable
Prerequisite	5+ Yrs. Professional Exp.
Level of Instruction	Intermediate
Delivery Method	Group Live Group Internet Blended Learning
CPE Credits	16 hours
Auditing (Aud) – 8.5 Personal Development (PD) – 6 Management Services (MS) – 1.5	
Advanced Preparation	None

LEARNING OBJECTIVES

- Perform managerial roles on audit engagements, including identifying quality issues, job specific project management, and managing multiple over-lapping projects.
- Analyze and report to the client all required information, including addressing financial misstatements and control deficiencies.

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MODULE INFORMATION

Prerequisite **1+ Yrs. Management Experience**

Level of Instruction **Intermediate**

Delivery Method **Group Internet
Group Live**

CPE Credits **20 hours**

Communication (Comm) – 10
Personal Development (PD) – 10

Advanced Preparation

Bring a presentation for delivery during the program

LEARNING OBJECTIVES

- List and apply best practices for making successful presentations in the business setting.
- Describe strategic activities to grow a professional network, including key people within your firm, and existing and potential clients.
- Analyze and practice best approaches to tackle difficult conversations with clients and team members.
- Demonstrate leadership skills by identifying and recognizing your own biases, listing strategies to motivate the individuals on your engagement teams, and prioritizing the professional development of staff.

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Experienced Manager Program

EXPERIENCED MANAGER PROGRAM (EMP) SUMMARY

The EMP is designed for individuals who have 2+ years of experience in the manager role in client service. This 2.5 day program will explore the skills necessary for seasoned managers to develop into future leaders of the organization. The EMP provides a deep dive on the topics relating to leading teams, crucial conversations, business development, and a heavy emphasis on business presentation skills. Participants will have an opportunity to explore and build upon their strengths, and to identify strategies to work through challenges.

MODULE SUMMARY

Introduction and Goal Setting..... (PD 1)

- Identify challenges facing experienced managers
- List goals for implementing strategies discussed in the program

Successful Communication..... (Comm 4)

- Analyze three components of successful communication; intentional communication, active listening skills and the role of non-verbal communication
- Analyze differences between electronic and in-person communications and how to become more effective at both
- Practice opportunities to implement the components of successful communication

Virtual Presentation Skills.....(Comm 6)

- List essential skills for exceptional virtual presenters
- Identify best-practices for setting up your virtual presentation studio
- List common tools for creating engagement and collaboration in your virtual presentations
- Practice delivering business presentations in a variety of settings

Building an Intentional Network(PD 2)

- Delve into steps to take to begin conversations that lead to winning new business
- Explore network building strategies in a remote work environment

Leading Virtual Teams..... (PD 5)

- Analyze the characteristics of successful virtual teams
- Assess self-awareness around topics of diversity and review strategies to build trust
- Analyze internal and external motivational factors and explore the impact of a team leader on the motivation of individual team members
- Explore obstacles that hinder successfully motivating and developing others
- Examine strategies to better develop engagement team members

Managing Energy & Stress (PD 2)

- Identifying impacts on your own energy as well as energy of your team members
- Brainstorm strategies for managing mindset, energy and activities to improve performance and satisfaction
- Support team members through stressful times



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