



# Amelio Offers Holistic Process-Management Platform for Specialized Audit Needs

AN INDUSTRY WHITEPAPER FROM HKMP TECHNOLOGIES



Finding a practical solution for difficult audit areas can be frustrating for firms shopping from the limited selection of off-the-shelf products. Boilerplate audit methodology products that incorporate AICPA standards are often too general; it's easy to miss questions or ask too many, resulting in a loss of both efficiency and compliance. And workflow/task-tracking products don't allow you to capture audit data within the program, so you're left with the cumbersome task of managing two systems.

Amelio by HKMP Technologies is a process-management platform that incorporates the features of both audit methodology and workflow products with the added benefit of flexibility. While Amelio is an automated solution, it is both highly customizable and logic-driven — the user determines both the questions and the rules.

## YOUR RULES, YOUR WAY

Amelio offers a toolset to let clients easily build logic-driven checklists and forms by setting up questions that can take the shape of drop-downs, checklists, comment fields and more. Depending on how the auditor answers a given question during the auditing process, relevant questions appear in the checklist or on the form while irrelevant ones disappear. Plus, questions can be added on the fly. As these questions are added, they're captured by Amelio and integrated into the checklist or form. The ability to customize the process, while still using a paperless, technology-driven platform, led Schultheis & Panettieri, LLP (SNP) to choose Amelio for its highly specialized auditing needs.

SNP is one of only a handful of firms in the United States that offers auditing services for multiemployer benefit plans. Because of the niche nature of this service, SNP found that off-the-shelf audit methodology solutions and workflow/task-tracking products were too general. So SNP was forced to create manual checklists and forms, a laborious task that took numerous employee hours and reams of paper to complete.

Since switching to Amelio, SNP has been able to conduct more comprehensive audits tailored to

the clients it serves. In addition, Amelio has enabled the firm to determine how much control and flexibility to give its staff members throughout the audit process. SNP has found that having a logic-driven platform in place has allowed the company to become both more efficient and more compliant on the back end, saving time and, ultimately, money.

## BAKED-IN WORKFLOW

Amelio's customizable audit methodology is only half of its appeal for auditors seeking an all-in-one process-management tool. Amelio's integrated, task-based workflow features help make it a comprehensive solution for any firm looking to streamline its audit process. And although Amelio was developed specifically for accounting firms with specializations, it can be used for any logic-driven, workflow process. In fact, while SNP initially chose Amelio for its auditing function, the firm has adapted it for its engagement letter process as well. The result is that more employees are getting involved with the workflow and, after decades of using a manual auditing system, the firm's partners are becoming more familiar and comfortable with a technology-driven platform like Amelio.

Mayer Hoffman McCann P.C. (MHM), which offers a wide range of accounting and business management services, also chose Amelio as the platform for its audit process, then discovered that it was the ideal solution for the firm's client engagement and acceptance process. MHM users now utilize workflow features, such as role-based task assignments, notifications, and due dates and milestones for each project not only for client acceptance, but also to approve changes to client accounts. Those changes feed into several integrated processes, including the company's time and billing software and customer relationship management software.

2014 marks MHM's third busy season using Amelio. Currently, 800 auditors are using Amelio, and the firm is nearing 1,500 users for client acceptance. MHM saw a 7 percent savings in efficiency the first year and an 8 percent savings the second year, which it attributes to the combined use of Amelio and its own audit methodology.

## ONE-STOP SOLUTION

For firms looking to cut down audit time, increase control and maximize flexibility while remaining compliant, Amelio is the only all-in-one solution. Furthermore, it's more affordable and approachable than other industry leading products because there's no need to bring in developers to build forms; the person authoring the forms and checklists can create the logic directly within Amelio.

## AMELIO'S SUITE OF ROBUST FEATURES AND ADVANTAGES INCLUDES:

**Logic-driven process:** Determine your own questions, tasks and logic, so there's less time wasted and less worrying about compliance.

**Powerful controls:** Manage which employees can modify various parts of the program or steps in the audit process.

**Role-based task assignments:** Assign tasks to an individual or a group so no item is overlooked or duplicated.

**Notifications:** Stay on time and on track by keeping important tasks top of mind.

**Due Dates:** Manage project milestones and meet deadlines by never missing a due date.

**Open Application Programming Interface (API):** Seamlessly integrate Amelio with other applications, including engagement management, practice management, CRM and your own proprietary systems.

**Reporting Capabilities:** Identify trends and anomalies by generating reports that can include any answer, sign-off or engagement.

**Security and Efficiency:** Lock down checklists and forms in PDF format after the audit is complete and roll them over from year to year.

**Cloud or On-Premise Options:** Get instant access whether at the office or in the field.

**Engagement Upgrade:** Upgrade your engagement to the latest version of the template without losing your work. Insert new questions into completed or partially completed forms without losing valuable audit time.

**Collaboration With External Users:** Reduce your auditors' workload by sending sections of an engagement to the client ahead of time so they can complete them online.

If you're struggling to cut down audit time while customizing for your niche clientele, let us show you what Amelio can do for you.

To learn more, watch a video at [ameliosoftware.com](https://ameliosoftware.com)

Contact Randi Spatz at (212) 533-2727 or [randispatz@hkmp.com](mailto:randispatz@hkmp.com) to discuss how Amelio can meet your company's unique auditing needs.

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