

CCH Axxess™ Knowledge Coach and CCH® ProSystem fx® Knowledge Coach

Welcome to 2025 Knowledge-Based Examinations of Service Organizations for Knowledge Coach

This bulletin provides important information about the 2025 release of Knowledge Based Examinations of Service Organizations. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Information about the Title

This title is designed to help the practitioner efficiently and effectively conduct examination engagements of service organizations in accordance with applicable standards issued by the American Institute of Certified Public Accountants (AICPA). The knowledge-based methodology for service organization engagements is a risk-based methodology for conducting examination engagements of service organizations. It emphasizes using knowledge of the entity, subject matter, and criteria to make the risk assessments and recommendations in connection with an engagement. The more accurately a practitioner assesses risks of material misstatement or deviation, the more assurance the practitioner has that the procedures performed in response to the risk assessments will detect material misstatements or deviations.

Examination of Service Organizations are often unique and complex, and require specialized accounting, and attestation knowledge. Conducting Examination of Service Organizations requires the exercise of the practitioner's professional judgment. This edition includes specific up-to-date guidance for Examination of Service Organizations and is published for the purpose of communicating, to users of the toolset, updates and enhancements included in the current version.

This document is published for the purpose of communicating the updates and enhancements included in the current version to users of the toolset. This document is not, and should not, be used as an audit program to update the audit documentation of an engagement started in a previous version of this product.

The 2025 title includes CCH® Accounting Research® material links to specific guidance, providing instant access to detailed analysis related to the steps and processes discussed in the workpapers.

New in this Release

2025 Edition of Knowledge-Based Examinations of Service Organizations

This edition features numerous enhancements, including:

- New workpapers to assist in implementation of SSAE-23 and SQMS-1 through SQMS-3
- Enhancing instructions and procedures throughout the toolset to improve workflow

- CCH® ProSystem fx® Engagement 2023 Compatibility

This title can be installed on Engagement v2023 by first installing the Engagement v2023.2.3 Update. The latest update can be downloaded via CCH Software Delivery Manager. This update allows you to use the 2025 content without installing Engagement v2024 until your firm plans to update.

CCH Axxess Knowledge Coach Instructions and Information

No installation is necessary. Once released, the title will be available for use after login. See the help topic [Updating Industry Content to the Latest Version](#) for instructions about applying the updated title.

CCH ProSystem fx Knowledge Coach Instructions and Information

Updating Your Title

If you are updating from a previous version of this title, review **Help > Knowledge Coach Help Topics**, then select "Updating to the Latest Version of a Workpaper" from the Table of Contents.

Best Practices

- Save changes to workpapers before closing the workpaper or the binder to ensure data is correctly updated.
- If Microsoft® Word crashes when using Knowledge Coach, before closing the binder, use the **Save Knowledge Coach Answers** option in the binder view under the Tools menu. This saves all data within tables.
- You can view other Knowledge Coach best practices on our [Website](#).

License Requirements

This title requires the Knowledge-Based SOC Engagement license. Users who do not have a license for this title cannot use Knowledge Coach functionality in workpapers.

- For information on updating your licensing, see [How do I add or update CCH ProSystem fx Engagement Licenses?](#) on our Support Website.
- For more information on assigning licenses, see [How do I assign Engagement licenses?](#) on our Support Website.

Download and Installation Instructions

See [How do I add a new CCH ProSystem fx Knowledge Coach title to CCH ProSystem fx Engagement?](#) for instructions on installing a new Knowledge Coach title.

Notes:

- You must install the 2024 Financial Statement Base title before installing this title.
- This title can be installed on Engagement v2023 by installing the v2023.2.2 or later update available on Software Delivery Manager.
- On some occasions the content package file (.KCP) will download with the extension changed to .ZIP. If this occurs, change the extension of the downloaded file to KCP, using all capital letters.

We also have a utility to help you install and release your titles. See [How do I use the CCH ProSystem fx Knowledge Coach Title Install Utility?](#) for more information.