



User Guide for the EBPAQC Member Discussion Forum

Enter the Forum

URL <http://ebpaqc.aicpa.org/ifEBP>

The EBPAQC has prepared this guide to help you use the Center Forum. Contact the Center at epaqc@aicpa.org if you have any questions about using the Forum.

The Employee Benefit Plan Audit Quality Center (EBPAQC) Member Discussion Forum provides you with an opportunity to network, exchange information, share best practices, and discuss issues with other member firms, like your own, that have demonstrated a commitment to audit quality. The following Forums exist for members:

- **Audit**
- **FAS 157 Implementation**
- **403(b) Plan Audits**
- **Tax and Compliance**
- **Multiemployer Plan**
- **Form 5500**
- **Form 11-K**

The Forum is easy to use and can provide you with a wealth of information and ideas, keep you abreast of current practice issues and improve your knowledge of employee benefit plans.

You can also provide other firm employees with access to the EBPAQC Forum and other premium content on the EBPAQC Web site. There is no limit to the number of individuals in your firm to whom you grant access—it's completely up to you to decide which employees to include. Instructions for inviting other employees to participate in the Forum are provided in this document.

The material posted within the Forum represents the viewpoints and opinions of its participants and not necessarily those of the AICPA. In addition, the AICPA cannot and does not guarantee the validity or the accuracy of the information posted on the Forum.

How do I become a Forum user?

To become a Forum participant, you simply need to activate your firm's UNIQUE ACTIVATION LINK that you received, via email, when your firm joined the Center. This will allow you to access all of the premium content on the Center's website, including the Forum. If you do not have your firm's UNIQUE ACTIVATION LINK, please email the Center at epaqc@aicpa.org and it will be emailed to you.

You will then be prompted to log in using your AICPA.org or CPA2Biz.com username and password, or if you do not have one, create a new username and password. If you have forgotten your AICPA.org or CPA2Biz.com username or password, click on the "Forgot Your Password link" on the Log in screen. Remember to save your username and password in an easily accessible place so that you can locate it each time you access the site.

You are ready to begin to use the Forum by clicking on the "Enter the Forum" button on the website. Should you need assistance with the log in process or using the Web site, please contact the AICPA Service Center at 800-708-8775 or service@aicpa.org.

How do I invite others in my firm to use the Forum?

To provide other employees with access to the Forum, provide them with your firm's UNIQUE ACTIVATION LINK that you received, via email, when your firm joined the Center and have them click on the link and follow the instructions on the screen. They will need to enter their own username and password, and then they will have access to all of the premium content.

How do I create and edit my user profile?

You may want to include personal information in your member profile to facilitate discussion groups with members of similar interest, geographical area, etc. This information is maintained in the control panel under contact/personal information. Information you may want to include in your profile are: email address, business webpage address, business location, occupation, personal interests and a brief biography. To get to this panel, click on "control panel" on the toolbar at the top of the page and select "contact/personal information".



Suggestions for using the Forum

Following are some suggestions to help you and others make the most of your Forum:

- Before posting your question, search the Forum. Your question or comment may have already been discussed, answered or resolved.
- Create a concise subject that adequately summarizes your topic. For example: "Applying SAS 99 in a defined contribution plan audit".
- Increase the likelihood of starting a discussion by providing details in your comment or question, and by choosing a relevant category, release and platform for your topic.
- Be patient. All the participants of this Forum are using the Forum and participating in discussions on their own time.
- Help others. The Forum is a community, and works best when people share information.
- Give feedback. If someone helps you by answering your question, try to add a follow-up response letting them know whether or not it worked.
- Welcome newcomers. Make them feel welcome in the forum community.

How do I find a topic on the Forum?

Once in the Forum, you will be on the home page, which will list the 7 forum areas: Audit, FAS 157 Implementation, 403(b) Plan Audits, Tax and Compliance, Multiemployer Plan, Form 5500 Reporting and Form 11-k. Select the forum area in which your question pertains to. You can search the topics under this forum to see if your subject has started a discussion group as yet or you can start a new topic.

	Forums	Topics	Replies	Last Post
	Audit Forum (add/view new postings)  Discussion of employee benefit plan audit issues  Archived postings (read only) - 163 topics	190	223	Yesterday @ 7:13 PM In: Wystar - Riggs/PNC by Member Name

Using the Search Function

Find discussion topics of specific interest to you by using the Forum search function. Click on "Search" at the top of the Forum webpage.

it Forum (add/view new postings)				Search This Forum	Forum Options
Topic	Started By	Replies	Views	Last Post	

The Advance Search allows you to search discussion titles and message text, sort by subject, forum name, posting date, author, number of replies and number of views. Go to a specific Forum home page, and then click on "Search this Forum".

Advanced Forum Search

Keywords:	Filter by username or ID: (Optional)
<input style="width: 95%;" type="text"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Using...</p> <p><input checked="" type="radio"/> ANY of the terms entered above</p> <p><input type="radio"/> ALL of the terms entered above</p> </div>	<input type="checkbox"/> Exact name match From member group... <input type="checkbox"/> Include banned members <input type="text" value="All Groups"/>
<input checked="" type="checkbox"/> Keep search options visible to help refine search	
<input type="button" value="ONSC"/> <input type="button" value="SEARCH"/>	

How do I sort topics to view?

You have the option of sorting in 5 different categories: (1) topic start date; (2) last post date; (3) topic title; (4) number of replies; and (5) number of views. You can select the method that you would like to sort by at the bottom of the topic page. You can simply choose the method to sort, ascending or descending order, and you can specify range of dates of postings to sort.



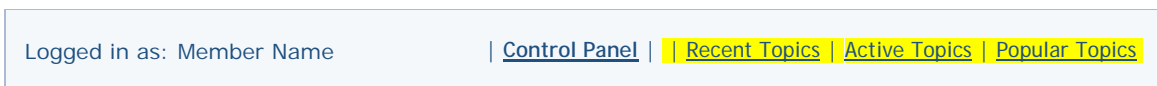
The screenshot shows a forum interface for "Form 5500 Reporting Forum (add/view new postings)". It includes a table with columns for Topic, Started By, Replies, Views, and Last Post. The current topic is "Audit Requirement when falls below 80" with 1 reply and 9 views, last posted on 3/1/2006 9:09 AM. Below the table, there are sorting options: "Sorted by" set to "last post date", "in" set to "descending order", and "from" set to "the beginning". There is also a "Forum Jump..." dropdown and a "FOR TOPIC" button.

How do I find popular topics?

You can view topics by the following criteria:

- Recent topics – will only show topics or replies posted since your last visit, last 12 hours, last 24 hours or last 48 hours.
- Active topics – will only show topics posted in the last two weeks which members have replied to.
- Popular topics – will only show topics posted in the last two weeks and members have viewed.

You can view these options by simply clicking on the preferred option on the top toolbar of either the forum or topic page.



The screenshot shows a forum toolbar with the following elements: "Logged in as: Member Name", "Control Panel", "Recent Topics", "Active Topics", and "Popular Topics". The "Recent Topics", "Active Topics", and "Popular Topics" links are highlighted in yellow.

How do I start a new topic?

Select forum options (right hand corner) and then select post new topic. You will need to enter a subject line (topic) and then type your inquiry in the message box. You will probably want to check the box subscribe to this topic, underneath message, so that you will receive email notification when a posting is made to this topic.



The screenshot shows a forum topic page for "Audit Forum (add/view new postings)". It includes a "FOR TOPIC" button and a "Forum Options" menu. The "Forum Options" menu is highlighted in blue.

[Post New Topic](#)

[Subscribe To Forum](#)

Post New Topic

Subject:

Message Icon:

Message: *

Subscribe to this topic. Email me when members post a reply to this topic!

Add attachments to this post!

Post New Topic Spell Check Preview »

How do I add attachments to postings?

You can add up to three attachments per posting by checking off the add attachments box below the message box.

How do I respond, subscribe, or email an existing topic?

While in the topic, you can select topic options, and then "post reply to topic". You will then be given a message box to type your response in. You can also "subscribe" to this topic by checking the box at the bottom. To email a topic to another person, select "email this topic" under topic options. However, only registered members with valid user ids and password can view the Forum webpage.

Topic Options
Post Reply To Topic
Subscribe To Topic
Email This Topic
Printable Version

How do I receive email notifications of postings to a specific forum or topic?

Select this option by going to either the Forum homepage or select a topic and select "Forum options" or "topic options" and click on subscribe to forum/topic. This will automatically subscribe you. The email notifications will be sent to the email assigned to your username and password. You can see which Forums/topics you are subscribed to by selecting control panel, Forum/topic subscriptions. This will list what forums/topics you are subscribed to. You can also "unsubscribe" to these emails through this page as well.

How do I receive email notifications of postings by a specific member?

Click on a member's name either on the topic page or select a member from the member list. The member's profile will pop up and under personal information; you can subscribe to all topics posted by this member or participate in by this member. You can also email a member from the forum by either selecting the email option under the member's posting or response or through the member's profile page.

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