



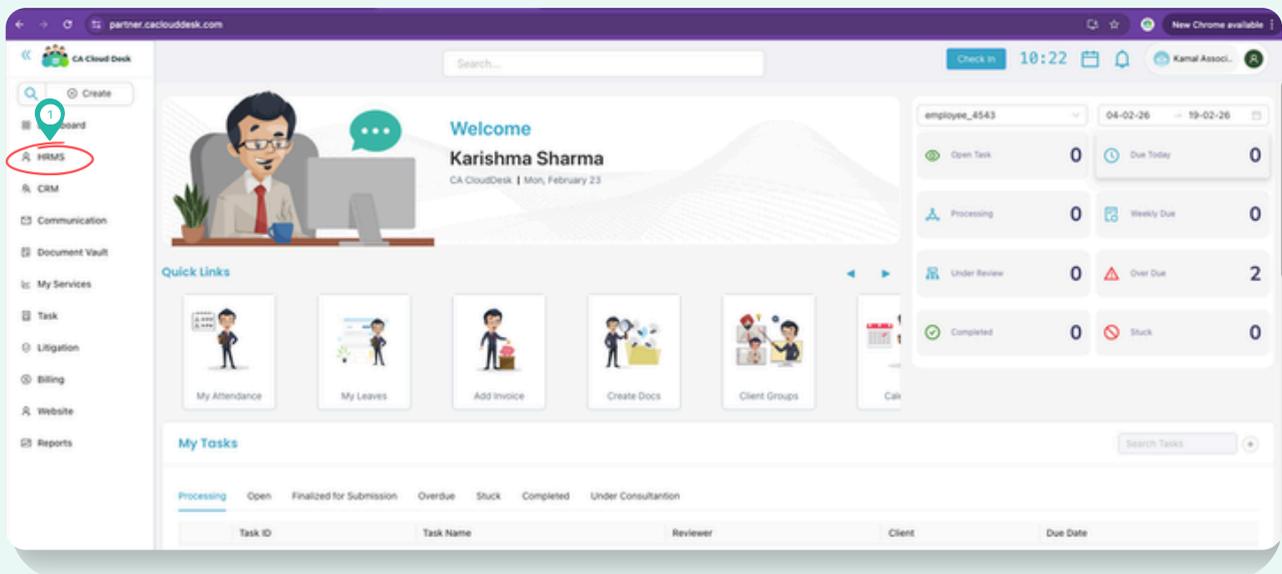
# Peer Review

## CA CloudDesk



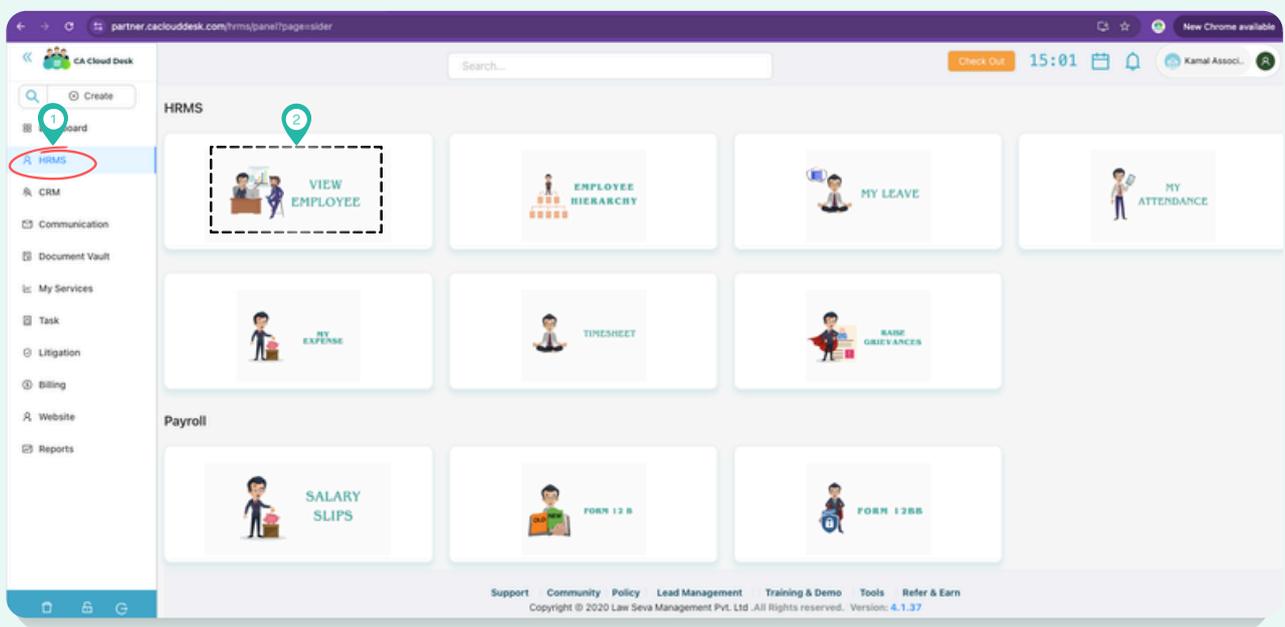
## Step 1: Login

1. Login to CA Cloud Desk Partnerdesk and open **HRMS** from the left panel.
2. On the HRMS screen, click **View Employee**.
3. Open the **Freelancers tab** (or Employee tab, depending on what you are adding), then click the **+ icon** to add.
4. Fill the Add Employee form (Employee Details → Permissions → Additional Details → Bank Details → Emergency Contacts → Upload Documents) and click **Submit**.



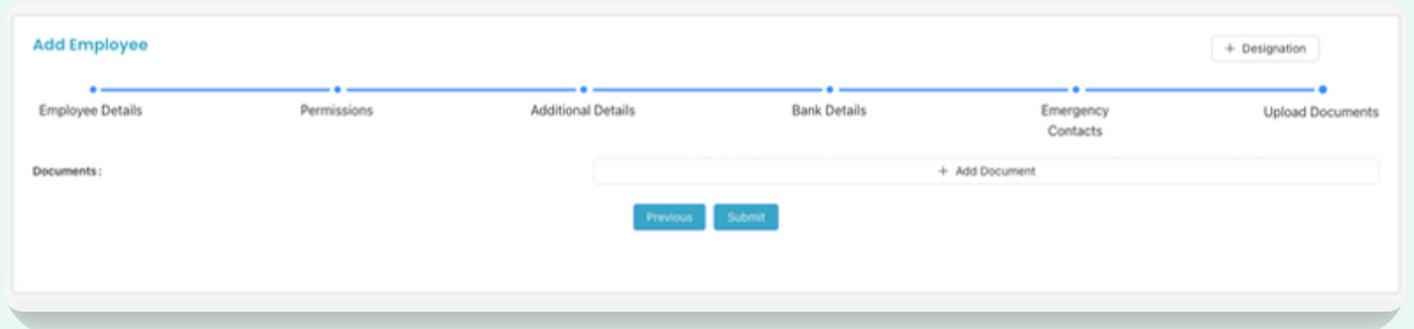
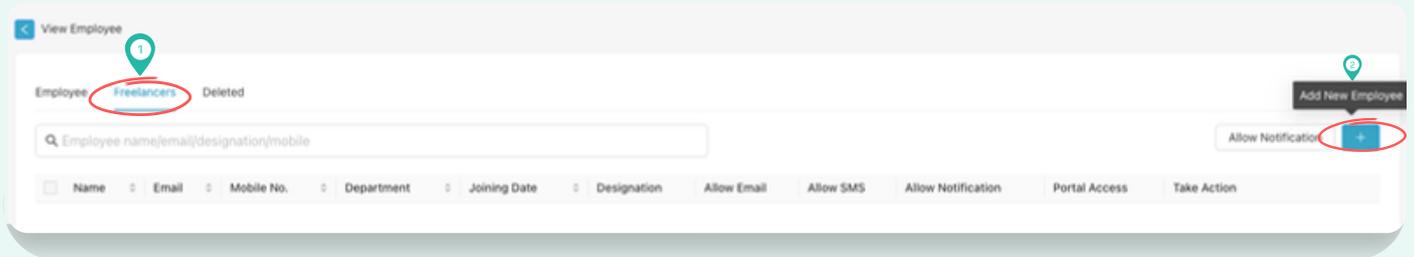
The screenshot shows the CA CloudDesk dashboard. The left sidebar contains a menu with 'HRMS' circled in red. The main area displays a welcome message for Karishma Sharma and a 'My Tasks' section with a table of tasks.

Task ID	Task Name	Reviewer	Client	Due Date



The screenshot shows the HRMS dashboard. The 'VIEW EMPLOYEE' button is highlighted with a dashed box and a red circle. The left sidebar also has 'HRMS' circled in red.

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## Step 2: Open Peer Review

1. From the **left panel**, click **Document Vault**.
2. On the Document Vault screen, click the **Peer Review** card.



## Step 3: Peer Review List (Screen)

When Peer Review opens, you'll see an engagement list in a table. You can filter by Client & Employee, and use the **+ icon** to add a **new peer review entry**.

Add Peer Review 

Peer Review

Client: [Dropdown] Select Employee: [Dropdown] [Icons]

#	Client Name	Financial Year	UDIN No.	PAN	File NO.	Name of Branch/HO of PU	Team InCharge	Services	Turnover > 250 Cr	Networth > 100 Cr	IND AS Balance Sheet	Weather Engagement Quality Review Done	Paid up/ Partner's/ Proprietor's Capital	Borrowings from Banks/ NBFCs (incl. Short Term & Long Term)	Fees	Net Profit
1	RAVI KUMAR ENTERPRISES	FY 25-26	23ab877&	na	123	Mumbai	--	AD Code	--	50L-1Cr	--	No	--	--	--	--

## A.) Add Peer Review Details

- Click the **+** icon on the **Peer Review** list page.
- Fill the **peer review details** .
- Click **Next** to move to the **document upload step**.

Add Client Add UDIN View Peer Review

Peer Review Upload Documents

**UDIN No.**  
UDIN No [Dropdown]

**Financial Year \***  
FY 25-26 [Dropdown]

**Name of Branch/HO of PU \***  
Mumbai [Dropdown]

**Professional Employee**  
Professional Employee [Text]

**Name of the Client \***  
Name of the Client [Dropdown]

**Services \***  
Services [Text]

**Name of the Signing Partner \***  
Name of the Signing Partner [Dropdown]

**Team \***  
Select Team [Dropdown]

**Team Incharge**  
Name of the Team Incharge [Text]

**PAN No.**  
PAN No. [Text]

**File No.**  
File No. [Text]

**Turnover**  
Turnover [Text]

**Networth**  
Networth [Text]

**Paid up/ Partner's/ Proprietor's Capital**  
Paid up/ Partner's/ Proprietor's Capital [Text]

**Borrowings from Banks/ NBFCs (incl. Short Term & Long Term)**  
Borrowings from Banks/ NBFCs (incl. Short Term & Long Term) [Text]

**Fees**  
Fees [Text]

**Net Profit**  
Net Profit [Text]

**Balance Sheet**  IND AS  AS

**Weather Engagement Quality Review Done**  Yes  No

**Remarks**  
Remarks [Text]

**Next**

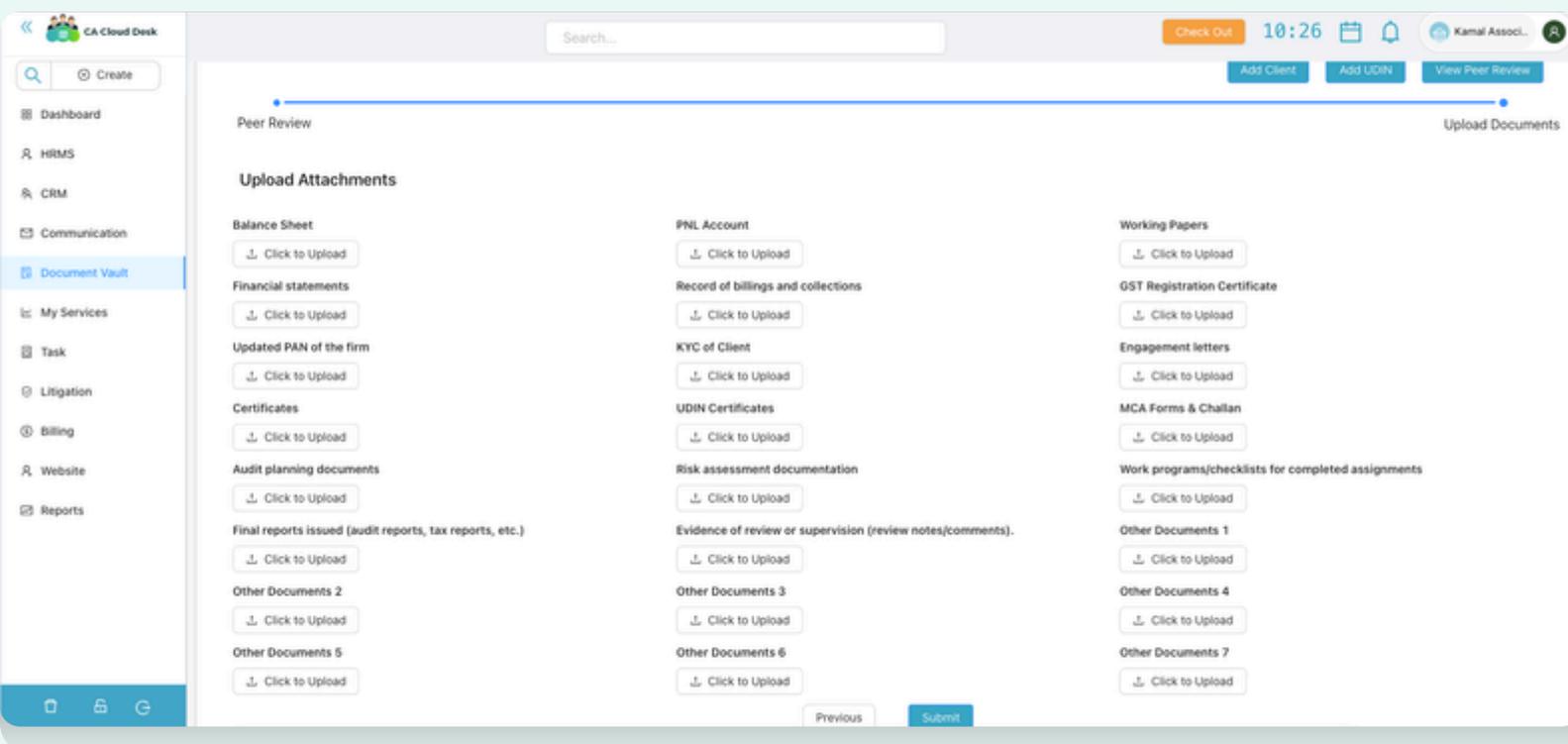
**Fields to fill (as shown in the form):**

- UDIN No.
- Financial Year
- Name of Branch/HO of PU
- Professional Employee
- Name of the Client
- Services
- Name of the Signing Partner
- Team
- Team Incharge
- PAN No.
- File No.
- Turnover
- Networth
- Paid up/ Partner's/ Proprietor's Capital
- Borrowings from Banks/ NBFCs (incl. Short Term & Long Term)
- Fees
- Net Profit
- Balance Sheet: IND AS / AS
- Whether Engagement Quality Review Done: Yes / No
- Remarks

## B.) Upload Required Documents

After you **click Next**, the Peer Review module shows a checklist-style upload page.

Upload the required documents and then **click Submit**.



The screenshot shows the 'Peer Review' module in CA CloudDesk. The page is titled 'Peer Review' and 'Upload Documents'. It features a search bar at the top, a navigation menu on the left, and a main content area with a grid of document categories. Each category has a 'Click to Upload' button. The categories include: Balance Sheet, Financial statements, Updated PAN of the firm, Certificates, Audit planning documents, Final reports issued (audit reports, tax reports, etc.), Other Documents 2, Other Documents 5, PNL Account, Record of billings and collections, KYC of Client, UDIN Certificates, Risk assessment documentation, Evidence of review or supervision (review notes/comments), Other Documents 3, Other Documents 6, Working Papers, GST Registration Certificate, Engagement letters, MCA Forms & Challan, Work programs/checklists for completed assignments, Other Documents 1, Other Documents 4, and Other Documents 7. At the bottom, there are 'Previous' and 'Submit' buttons.

## Outcome & Best Practices

After you click Submit:

- The peer review entry appears in the View Peer Review list.
- You can use filters (Client / Employee) to quickly find the engagement later.
- All uploaded attachments remain linked to that engagement for audit/peer review reference.