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Approving Reviewer Schedule after Adding Team Members (Firm)

Average **5.0**

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Once the reviewer / team captain has assigned a schedule and selected a team, scheduling checks are initiated to verify qualifications based on engagements. If there are any conflicts or additional team members have been added, the scheduling case is returned to the firm for corrections and final approval.

For video instructions, see [Approving Reviewer Schedule after Adding Team \(Firm\) - Video](#).

To approve reviewer scheduling and independence, perform the following steps:

1. Under **Action Items**, click the scheduling (SCH) **Case ID**.

Case ID	Review Number	Firm Number	Firm Name	Task Description	Status	Received Date	Comments
SCH-323610				Acknowledge Scheduling Information	Pending-Submit To AE	11/30/2017	

Case ID	Review Number	Firm Number	Firm Name	Task Description	Status	Assigned To	Review Type
SCH-323610				Acknowledge Scheduling Information	Pending-Submit To AE		System Review

2. Review **Independence Attestation** and **Review Team**.

3. Select **Yes** to the question **Do you agree to have your review performed by the review team?**

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Scheduling

Schedule Additional Info Approve Resolve Show all steps

To Do Additional Information

Independence Attestation

Instructions

- Click on the Additional Information tab to view captains independence and any additional team members that were added.
- By agreeing to the review team you are attesting to your firm's independence.

Member Number	Member Name	Member Type	Email	Firm Number	Firm Name
	Bill	Team Captain			
	Mike	Team Member			
	Tom	Team Member			
	Sally	Team Member			
	Mary	Team Member			
	Jack	Team Member			
	Nancy	Team Member			

The reviewed firm and reviewing firm are responsible for determining independence and should consult peer review guidance, especially the [Peer Review Standards Interpretations](#) regarding Independence, Integrity and Objectivity for more detailed guidance and examples.

Do you agree to have your review performed by the review team?

By doing so, you acknowledge there are no relationships or transactions between the reviewed firm, the reviewing firm and the review team members (including team/review captain) (parties) that may give rise to a conflict of interest or the appearance of independence being impaired.

Next

4. Click **Next**.

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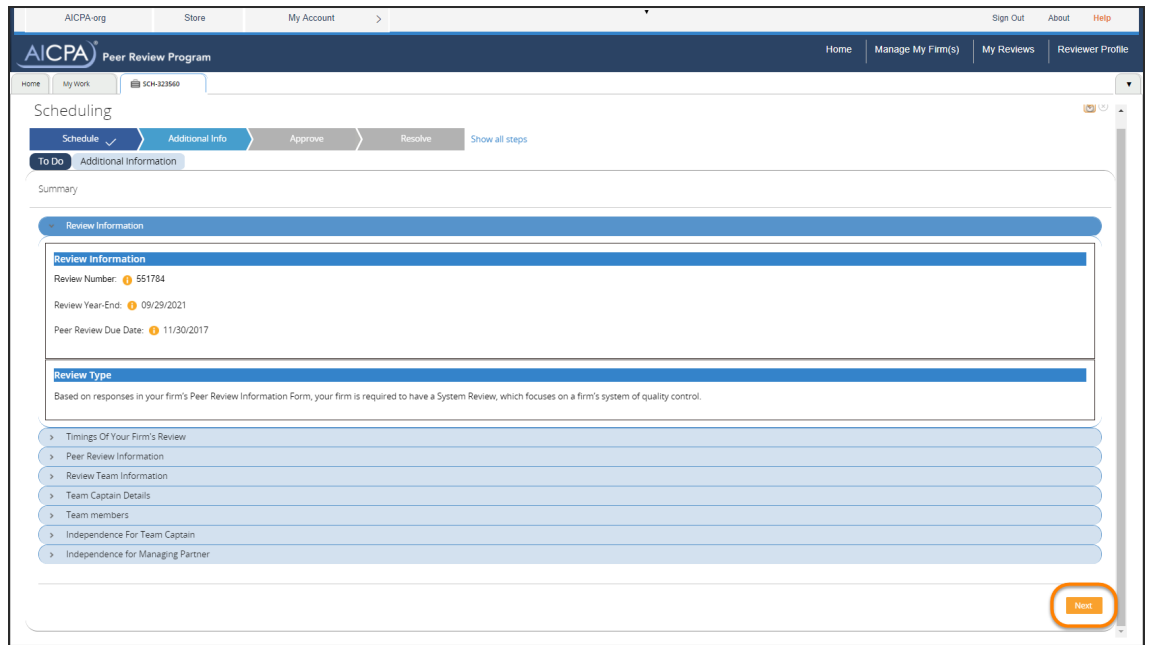
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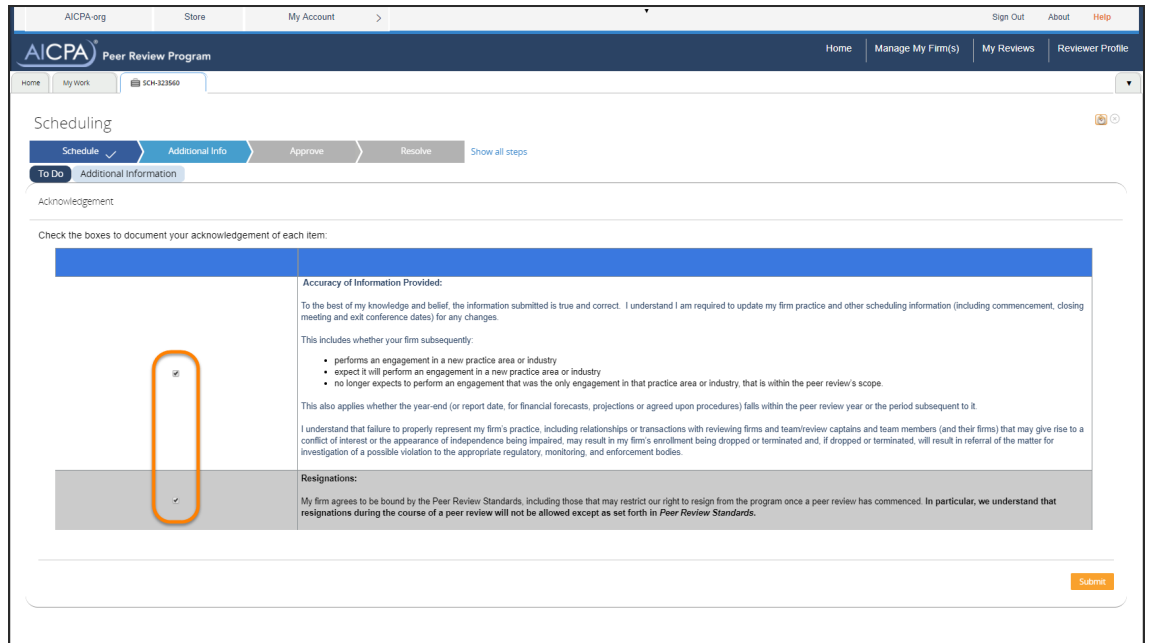
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Next

5. Click **Next**.



6. For **Acknowledgement** sections, select check boxes.



7. Click **Submit**.

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Scheduling

Schedule ✓ Additional Info Approve Resolve Show all steps

To Do Additional Information

Acknowledgement

Check the boxes to document your acknowledgement of each item:

<input type="checkbox"/>	<p>Accuracy of Information Provided:</p> <p>To the best of my knowledge and belief, the information submitted is true and correct. I understand I am required to update my firm practice and other scheduling information (including commencement, closing meeting and exit conference dates) for any changes.</p> <p>This includes whether your firm subsequently:</p> <ul style="list-style-type: none"> performs an engagement in a new practice area or industry expect it will perform an engagement in a new practice area or industry no longer expects to perform an engagement that was the only engagement in that practice area or industry, that is within the peer review's scope. <p>This also applies whether the year-end (or report date, for financial forecasts, projections or agreed upon procedures) falls within the peer review year or the period subsequent to it.</p> <p>I understand that failure to properly represent my firm's practice, including relationships or transactions with reviewing firms and team/review captains and team members (and their firms) that may give rise to a conflict of interest or the appearance of independence being impaired, may result in my firm's enrollment being dropped or terminated and, if dropped or terminated, will result in referral of the matter for investigation of a possible violation to the appropriate regulatory, monitoring, and enforcement bodies.</p>
<input checked="" type="checkbox"/>	<p>Resignations:</p> <p>My firm agrees to be bound by the Peer Review Standards, including those that may restrict our right to resign from the program once a peer review has commenced. In particular, we understand that resignations during the course of a peer review will not be allowed except as set forth in <i>Peer Review Standards</i>.</p>

Submit

Scheduling checks will be initiated and could take up to 5 minutes to process. If there are any scheduling errors, the peer review contact will receive an email. For more information on resolving scheduling errors, see [Resolving Scheduling Errors in PRIMA \(Firm\)](#) and [Resolving Scheduling Errors \(Firm\) - Video](#). If there are no scheduling check errors, the form will be submitted to the Administering Entity for approval. The firm and reviewer will receive an email when the scheduling is approved.

After AE approval and the reviewer begins the review, the reviewer will create any potential MFCs and FFCs and upload working papers. Any required follow-up for the firm will generate an assignment under **Action Items**.

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