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Entering Engagement Summary on Engagement Reviews (Firms)

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Once the firm and the reviewer / team captain have approved the review schedule, the scheduling case is returned to the Administering Entity for final approval and initiation of the review process. Upon AE approval, for a system review, a case is sent to the reviewer / team captain for engagement details. For an engagement review, the review case is sent to the firm for engagement summary details. The firm may also submit the incomplete form to allow the reviewer / team captain to enter the engagement details.

For video instructions, see [Entering Engagement Summary on Engagement Reviews \(Firm\) - Video](#).

To enter engagement summary statistics and details, perform the following steps:

1. Under **Action Items**, click the review (RVW) **Case ID**.

The screenshot shows the AICPA PRIMA web application interface. The top navigation bar includes 'AICPA.org', 'Store', 'My Account', 'Sign Out', 'About', and 'Help'. The main content area is titled 'Home' and contains instructions for accessing the Knowledge Base. Below the instructions is a table titled 'Action Items' with columns: Case ID, Review Number, Firm Number, Firm Name, Task Description, Status, Received Date, and Comments. The first row in the table has 'RVW-324672' in the Case ID column, which is circled in orange. Below the table is a section titled 'My Firm's Open Reviews' with a sub-section 'Instructions' and another table with columns: Case ID, Review Number, Firm Number, Firm Name, Task Description, Status, Assigned To, Review Type, and Comments. The first row in this table also has 'RVW-324672' in the Case ID column. The right sidebar contains 'Instructions for Reviewers', 'View Letters' (16 items), 'Important Information' (6 items), and 'Contact Us' information for PRIMA.

2. Click the **Review Summary** tab.

The screenshot shows the AICPA review process interface. The 'Review Summary' tab is highlighted with an orange circle. The interface includes a navigation bar with 'Home', 'For Firms', 'My Reviews', and 'For Peer Reviewers'. Below the navigation bar, there are tabs for 'To Do' and 'Additional Information'. The main content area displays a 'Review process To PRC' section with 'Revise Working Papers' as a task. A summary box shows 'Firm Name', 'Team Type' (FOF), 'Review Due Date' (08/31/2018), 'Review Status' (Pending - Working Papers), and 'ReviewNumber'. Below this, there are tabs for 'Firm/Team Summary', 'Review Summary', and 'Matters'. The 'Review Summary' tab is active, showing a table for 'Managing Partner' with columns for 'Email', 'Phone', 'Peer Review Contact', and 'Email'. Below this is a 'Peer Review Information' section with fields for 'PRI-471324', 'Scheduling', 'SCH-330018', and 'Review'. A 'Review Team Members' table is also present with columns for 'Member Number', 'Member Name', 'Reviewer Type', 'Email Address', and 'Phone number'. The table shows one member with the role of 'Team Captain'. At the bottom, there are 'Save' and 'Send to Captain' buttons.

3. For each engagement, select **Industry** and enter **Population** hours.

The screenshot shows the 'Engagement Summary Form and Statistics' section of the AICPA review process interface. The 'Review Summary' tab is still selected. The interface includes a navigation bar with 'Home', 'For Firms', 'My Reviews', and 'For Peer Reviewers'. Below the navigation bar, there are tabs for 'Firm/Team Summary' and 'Matters'. The main content area displays a 'Print Review Summary' button and a section titled 'Instructions for Firm in Review Summary'. Below this, there is a section titled 'ENGAGEMENT SUMMARY FORM AND STATISTICS'. This section includes a 'Partner Name' field and a table with columns for 'Code', 'Level Of Service', 'Industry', and 'Population'. The table has three rows, each representing a different level of service. The first row has '1 380' as the code and 'Employee Retirement Income Security Act (ERISA) Defined Contribution Plans (excluding 403(b) plans)' as the level of service. The second row has '2 400' as the code and 'Employee Retirement Income Security Act (ERISA) Health and Welfare' as the level of service. The third row has '3 403' as the code and 'Employee Retirement Income Security Act (ERISA) Employee Stock Ownership Plans (ESOP)' as the level of service. Each row has a dropdown menu for 'Industry' and a text input field for 'Population' with a value of '0'. There are also delete icons for each row.

4. To add an additional level of service to an engagement, click the **Add Level Of Service** plus (+) icon.

Note: Only services specified on the PRI will be available for selection.

Note: Adding a level of service that is blank will result in an error. If added by mistake, delete the empty level of service.

The screenshot shows the AICPA engagement management interface. At the top, there is a navigation bar with 'AICPA.org', 'Store', 'My Account', and 'Sign Out About Help'. Below this is a purple header with the AICPA logo and navigation links: 'Home', 'For Firms', 'My Reviews', and 'For Peer Reviews'. The main content area is titled 'Home' and contains a list of engagement types:

Engagement Type	Action	Count
5 Performance Audits	Select	0
6 50 Preparation Engagements with Disclosures	Select	0
7 45 Compilations of financial statements that omit substantially all disclosures	Select	0

Below the list, there are two radio buttons: 'Add Level Of Service' (selected) and 'Add Partner'. At the bottom, there is a 'Total - All Engagements' section with 'Population Total 0'. A 'Save' button is on the left, and a 'Send to Captain' button is on the right.

5. To add an additional engagement partner, click the **Add Partner** plus (+) icon.

This screenshot is identical to the one above, but the 'Add Partner' radio button is highlighted with a red circle, indicating it is the next step in the process.

6. Once all engagement details are completed, click **Send to Captain**.

The screenshot displays the AICPA PRIMA interface. At the top, there is a navigation bar with 'AICPA.org', 'Store', 'My Account', 'Sign Out', 'About', and 'Help'. Below this is a purple header with the AICPA logo and navigation links for 'Home', 'For Firms', 'My Reviews', and 'For Peer Reviews'. The main content area features a table with three rows of engagement categories, each with a 'Select' dropdown and a '0' value field. Below the table are two radio buttons: 'Add Level Of Service' and 'Add Partner'. A summary box at the bottom left shows 'Total - All Engagements' with a 'Population Total' of 0. At the bottom right, there is a blue 'Save' button and an orange 'Send to Captain' button, which is highlighted with a red circle.

5	Performance Audits	Select	0
6 50	Preparation Engagements with Disclosures	Select	0
7 45	Compilations of financial statements that omit substantially all disclosures	Select	0

Add Level Of Service
 Add Partner

Total - All Engagements
Population Total: 0

Related Articles:

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