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Entering Review Scheduling Information in PRIMA (Firm)

Average **0.0**

Share

After completing the Peer Review Information (PRI) form, you will have the option to continue with the scheduling form or enter scheduling at a later time. If you chose to continue with scheduling, the scheduling case will automatically open. If you decide to wait or the case must be approved by your administrator, the scheduling case will eventually be added to your Action Items as described in step 1 below.

For video instructions, see [Entering Review Scheduling Information in PRIMA \(Firm\) - Video](#).

To complete the scheduling case, perform the following steps:

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

The screenshot displays the AICPA PRIMA web application interface. The top navigation bar includes 'Home', 'For Firms', 'My Reviews', and 'For Peer Reviewers'. The main content area is titled 'Action Items' and contains a table with the following data:

Case ID	Review Number	Firm Number	Firm Name	Task Description	Status	Received Date	Comments
SCH-330018				Enter Scheduling Information	Open-SCH-Info-Req	04/30/2018	

Below the table, there are sections for 'My Firm's Open Reviews' and 'Instructions'. The 'Instructions' section includes the following text:

- Items ready for you to work on will be located under the Action Items.
- Click on the link in the Case ID column to open case and complete task.
- Click on paper clip icon, located in the Comments column, to see revisions that have been requested.

2. Review **Introduction** and click **Next**.

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AICPA Home For Firms My Reviews For Peer Reviewers

Scheduling Open-SCH-Info-Req

Firm Name: Firm Number:
Review Number:

1 2 3 4 5 6
Introduction Review Information Sharing Peer Review Info Team Type Select Captain Summary

Introduction

You have previously responded to questions in the Peer Review Information (PRI) about your firm's practice so that the AICPA Peer Review Program can identify your peer review needs and quality control risks. The following information is necessary to schedule your firm's peer review. Approval of this information and your peer review team must be obtained prior to commencement of the review. Your firm is required to respond to all questions as a condition of cooperation with the AICPA Peer Review Program.

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3. Review the review information and click **Next**.

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Scheduling Open-SCH-Info-Req

Firm Name: Firm Number:
Review Number:

1 2 3 4 5 6
Introduction **Review Information** Sharing Peer Review Info Team Type Select Captain Summary

Review Information

Review Number: 557272
Peer Review Due Date: 07/31/2018

Review Type

Based on responses in your firm's Peer Review Information Form, your firm is required to have a System Review, which focuses on a firm's system of quality control.

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4. Review the **Facilitated State Board Access (FSBA)** information, and select if you want to opt out.

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1 Introduction 2 Review Information 3 Sharing Peer Review Info 4 Team Type 5 Select Captain 6 Summary

Facilitated State Board Access (FSBA)

The AICPA has implemented a process called Peer Review Facilitated State Board Access (FSBA), which facilitates the voluntary disclosure of peer review results via a secure, state board/licensing body (hereinafter referred to as BOA) web site. The goal of this process is to create a nationally uniform system through which CPA firms can satisfy BOA peer review information submission requirements and increase transparency. For more information, click here.

We are engaged in an ongoing collaborative effort with the AICPA and state CPA societies for this to be the primary process by which all BOAs obtain peer review results. Over time, this process will help to make the submission of firm's peer review information easier. **This process may not have replaced the current peer review information submission requirements of the BOA(s) by which your firm is licensed, so be sure to follow your BOA's information submission requirements until further notified.**

In accordance with AICPA Facilitated State Board Access requirements, I voluntarily agree that my firm's peer review results, including the acceptance letter, peer review report, letter of response, letter(s) signed by the reviewed firm accepting the peer review documents with the understanding that the firm agrees to take certain required actions, and letter notifying the reviewed firm that certain required actions have been completed, if applicable, will be made available to the state board of accountancy in the state in which my firm's main office is located, which is the Mississippi State Board of Public Accountancy. I AGREE TO MAKE MY FIRM'S PEER REVIEW RESULTS AVAILABLE TO THE STATE BOARD UNLESS I CHECK THE BOX BELOW TO OPT OUT

Do you want to Opt Out of FSBA?

Your firm's peer review results will be made available to the Mississippi State Board of Public Accountancy. Authorized representatives at the Board of Accountancy will have access to peer review documents once your firm's review is accepted. If you have any questions, please contact your administering entity. You may change your opt out selection at any time by logging into PRIMA and updating your FSBA selection.

Additional States

You may expand access to additional BOAs that are not prohibited from accessing FSBA. To do so, make your selections below:

Select All States

<input type="checkbox"/> Alabama	<input type="checkbox"/> Arkansas	<input type="checkbox"/> Arizona
<input type="checkbox"/> California	<input type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Delaware	<input type="checkbox"/> Georgia
<input type="checkbox"/> Guam	<input type="checkbox"/> Hawaii	<input type="checkbox"/> Iowa

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5. If applicable, under **Additional States**, select states to expand access to additional BOAs.

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Additional States

You may expand access to additional BOAs that are not prohibited from accessing FSBA. To do so, make your selections below:

Select All States

<input type="checkbox"/> Alabama	<input type="checkbox"/> Arkansas	<input type="checkbox"/> Arizona
<input type="checkbox"/> California	<input type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Delaware	<input type="checkbox"/> Georgia
<input type="checkbox"/> Guam	<input type="checkbox"/> Hawaii	<input type="checkbox"/> Iowa
<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois	<input type="checkbox"/> Kansas
<input type="checkbox"/> Kentucky	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maryland
<input type="checkbox"/> Maine	<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota
<input type="checkbox"/> Montana	<input type="checkbox"/> North Carolina	<input type="checkbox"/> North Dakota
<input type="checkbox"/> Nebraska	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> New Jersey
<input type="checkbox"/> New Mexico	<input type="checkbox"/> Nevada	<input type="checkbox"/> New York
<input type="checkbox"/> Ohio	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Oregon
<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina
<input type="checkbox"/> South Dakota	<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas
<input type="checkbox"/> Utah	<input type="checkbox"/> Virginia	<input type="checkbox"/> Virgin Islands
<input type="checkbox"/> Vermont	<input type="checkbox"/> Washington	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Wyoming		

Public File

Consent: I agree that the results of the review, or other information related to the acceptance or completion of the review, suitable to the public, shall be made available to the public.

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6. Review the **Public File** information, and select if you want your firm's results to be included.

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- New York
- Oregon
- South Carolina
- Texas
- Virgin Islands
- West Virginia

Public File

Paragraph 146 of the *Peer Review Standards* states that neither the administering entity nor the AICPA shall make the results of the review, or other information related to the acceptance or completion of the review, available to the public, except as authorized or permitted by the firm under certain circumstances. ⓘ

Firms that are currently members of the PCPS, EBPAQC, or GAQC already have their peer review results included on the AICPA's Public File website.

Although your firm is not a member of those groups, your firm has the option to voluntarily disclose to the public its peer review results on the AICPA Public File ⓘ website, along with its –

- Peer review report
- Peer review acceptance letter
- Letter of response (if applicable)
- Signed acceptance letter agreeing to corrective actions (if applicable)
- Notification of completed corrective actions (if applicable)

Do you want to include your firm's peer review results and documents on the AICPA Public File?

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7. Click **Next**.

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Public File

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- Peer review report
- Peer review acceptance letter
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- Signed acceptance letter agreeing to corrective actions (if applicable)
- Notification of completed corrective actions (if applicable)

Do you want to include your firm's peer review results and documents on the AICPA Public File?

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8. Review **Type Of Review Team** and click **Next**.

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Home For Firms My Reviews For Peer Reviewers

Scheduling Open-SCH-Info-Req

Firm Name: Firm Number:
Review Number:

1 2 3 4 5 6
Introduction Review Information Sharing Peer Review Info Team Type Select Captain Summary

Type Of Review Team:

Firm On Firm
Your firm will have a Firm on Firm Review

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9. Search for the reviewer / team captain by entering **Member Number, Member Name, Firm Number, or Firm Name** and click **Search**.

For tips on searching for a reviewer, see [Finding Team / Review Captain in PRIMA](#).

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Home For Firms My Reviews For Peer Reviewers

Please select the Captain by searching below. Only reviewers who have met the initial qualifications to be a peer reviewer will display.

The Captain will select the additional team members.

Search Reviewer By

Member Number First Name Last Name Firm Number Firm Name

Search

Enter at least one search criterion for results

Can't find your reviewer?

- Search by only 1 criteria
- Search by only the member number and do not include a zero at the beginning

Captain
Member Number:
Member Name:
Email Address:
Firm Name:
Firm Number:

Firm Independence
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.

By submitting this form to the team captain, you agree to have your review performed by the team/review captain and acknowledge there are no relationships or transactions between the reviewed firm and the reviewing firm (including

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10. Select the reviewer / captain.

Please select the Captain by searching below. Only reviewers who have met the initial qualifications to be a peer reviewer will display. !

The Captain will select the additional team members.

Search Reviewer By !

Member Number First Name Last Name Firm Number Firm Name

Bob

Search

Can't find your reviewer? !

- Search by only 1 criteria
- Search by only the member number and do not include a zero at the beginning

Member Number	Member Name	Firm Number	Firm Name
	Bob Roberts		

Captain

Member Number:

Member Name: Bob Roberts

Email Address:

Firm Name:

Firm Number:

Firm Independence

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.

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11. Review **Firm Independence** and click **Next**.

Search

Can't find your reviewer? !

- Search by only 1 criteria
- Search by only the member number and do not include a zero at the beginning

Member Number	Member Name	Firm Number	Firm Name
	Bob Roberts		

Captain

Member Number:

Member Name: Bob Roberts

Email Address:

Firm Name:

Firm Number:

Firm Independence

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.

By submitting this form to the team captain, you agree to have your review performed by the team/review captain and acknowledge there are no relationships or transactions between the reviewed firm and the reviewing firm (including team/review captain) (parties) that may give rise to a conflict of interest or the appearance of independence being impaired.

If the team/review captain adds additional team members you will receive a notification to reaffirm your firm's independence.

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12. Click **Submit to Captain**.

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AICPA Home For Firms My Reviews For Peer Reviewers

Scheduling Open-SCH-Information-Requested

Firm Name: Firm Number:

Review Number:

1 2 3 4 5 6

Introduction Review Information Sharing Peer Review Info Team Type Select Captain Summary

Review Information

Review Information

Review Number: 557272

Peer Review Due Date: 07/31/2018

Review Type

Based on responses in your firm's Peer Review Information Form, your firm is required to have a System Review, which focuses on a firm's system of quality control.

> Peer Review Information

> Review Team Information

> Team Captain Details

Help Save << Back Submit to Captain

The team captain will be notified to agree to perform the review. They will enter review dates. They will enter additional team members, if applicable.

If there are scheduling errors or added team members, the scheduling form will be returned to the firm for corrections and/or to confirm team independence.

For more information on confirming independence, see [Approving Reviewer Schedule and Independence Response \(Firm\)](#).

You can check the status of your review at any time on the **Home** page under **My Firm's Open Reviews**.

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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