Welcome to Peer Review

Below are some helpful hints to help you get through the peer review process. If your firm no longer does work that requires a peer review, please contact the GSCPA Peer Review Coordinator, Laura Harrison at 404-504-2958 or https://www.unitedimension. to resign your firm from the program.

- 1. <u>CPE class</u> Upcoming Peer Review: Is Your Firm Ready?
 - a. June 18, 2019 The GSCPA has an in-person class (which I will be attending) <u>Click this</u> <u>Link to Register</u>
 - b. On demand The AICPA has a self-study version of this class (in case you can't make it to Atlanta in June) <u>Click Here For Information</u>
- 2. <u>PRIMA is the AICPA's peer review website</u> everything concerning your peer review will go through this website. Please check for emails from PRIMA starting six months before your peer review due date. The PRIMA website is located at: <u>https://prima.aicpa.org</u> Use the same user name and password you use for the AICPA website *if you need help with your password contact AICPA Member Services at 888-777-7077.*
 - a. **PRIMA Notifications** When you have items to complete in PRIMA, you will receive an email notification from prima@aicpa.org, instructing you to log into PRIMA. For descriptions of the "Home" tab navigation, see <u>Navigating Firm Home Screen In PRIMA</u>
 - b. **Action Items** On the home page, also known as your dashboard, you will find the "Action Items" section. Items that you need to complete will be listed under "Action Items."
 - c. **PRIMA Help Articles** The AICPA Peer Review Program has developed a knowledge base for PRIMA users that contains help articles with PRIMA user instructions and information. These articles include screenshots as well as short demonstration videos. The help site can be accessed from the orange "Help" link in the top right corner of the PRIMA home page.

3. Filling out your firm's Peer Review Information (PRI)

Once prompted in PRIMA to complete the Peer Review Information form, perform the following steps:

Under Action Items, click the Peer Review Information (PRI) Case ID.

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Review Introduction and click Next.

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Introduction												
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Accurate responses to qu	estions on this form reg	garding the nature of your firm's pr	actice are imperative to the	administration	ion and perform	nance of your firm	's peer review. Fa	ailure to property repr	esent your firm's p	ractice may result in yo	our firm's enro	llment in
to classify any engageme	nts, consider consulting	g AICPA Professional Standards o	r your peer reviewer.	ne matter for i	nivesugation c	or a possible viola	non to the approp	nate regulatory, mon	toring, and emotor	ement boules. Il you al	e uncentain at	Dout now
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Review Firm Information. Update details, if needed.

Note: If the Managing Partner or Peer Review Contact is not visible and you are the managing partner, please send an email to prsupport@aicpa.org with your name and email address to update the information in PRIMA.

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Review **Engagement Levels of Service To Determine Review Type**. Update your responses as necessary.

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our responses	to the following questions will determine whether your firm will have an engagement review or system revi	ew, or confirm that your firm does not perform any A&A	engagements.		
las your firm pe	erformed engagements under the following standards with periods ending (whether issued or not) during	the year .🚹			
Please note: For	financial forecasts, projections and agreed upon procedures, please select 'Performed/Expect to Perform' for the	e relevant level of service if you have performed an engage	nent with a report da	te during the year.	
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Review **PCAOB Reports** selections. Update your responses as necessary.

If your firm is not registered with the PCAOB, answer "No" to all questions. If your firm is registered with the PCAOB, using the categories on the Form 2 submitted to the PCAOB, indicate which services were provided with period ends during your peer review year.

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Review Independence Standards. Update your responses as necessary.

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Review Must-Select & Must-Cover Engagements. Update your responses as necessary.

Note: If none are applicable to your firm, select None of the Must-Select or Must-Cover Practice Areas/Industries Apply.

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For Engagement Reviews, indicate if your firm is a provider of **Quality Control Materials**.

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For System Reviews only, review the **Other Practice Areas & Industries** and select those applicable to the engagements that require your firm to have a System Review.

Note: If none are applicable to your firm, select None of the other Practice Areas/Industries apply.

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	150	Colleges and Universities						
	155	Common Interest Realty Associations						
	165	Construction Contractors					1	
	195	Franchisors						
	260	Not-for-Profit Organizations (including voluntary health & welfare organizations)					1	
	268	Personal Financial Statements						
	314	Service Organizations (SOC 3 Reports)					1	
	330	Telephone Companies						
	335	Utilities					1	
=	460	Entities subject to Regulation Crowdfunding						
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For System Reviews only, selections from the previous step are listed under **Concentrations of Other Practice Areas & Industries**. Follow the instructions to indicate the applicable concentrations, then indicate if your firm is a provider of **Quality Control Materials**.

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To submit the form and open the scheduling case so that you can select a reviewer, click **Submit & Continue to Scheduling Form**. To submit the PRI and complete scheduling later, click **Submit & Complete Scheduling Form Later**. A scheduling case will be added to the **Action Items** list on the **Home** tab.



4. <u>Scheduling</u>

- a. If you need to find someone to do your peer review you can go to this link to sear https://peerreview.aicpa.org/reviewer_Search.html
- b. Once you have the list of qualified reviewers (generated from the link above) you must reach out to the reviewers and have one of them agree to do your peer review **BEFORE** scheduling them in PRIMA. Reaching out to several reviewers on the list is encouraged – they all have different schedules and prices.
- c. Once you have picked a peer reviewer and your peer reviewer has agreed to do your review you need to go into PRIMA and schedule them. <u>DO NOT LET THE REVIEWER</u> <u>BEGIN WORK ON YOUR PEER REVIEW UNTIL THEY ARE SCHEDULE & APPORVED</u> <u>WITHIN PRIMA!</u> Here are the instructions on how to schedule the reviewer in PRIMA:

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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.

5. Most importantly if you need any help during your peer review please feel free to reach out to us at 404-504-2998 or peerreview@gscpa.org