

Getting Started in PRIMA

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Introduction

The Peer Review Integrated Management Application (PRIMA) is the primary tool used by firms, reviewers, and the entities administering peer review to complete the peer review process. PRIMA is accessible to all AICPA and CPA.com customers whose records are linked to a public accounting firm in our records.

If your firm has undergone a peer review before with the same administering entity (AE) (typically a state society), your firm is probably set up in PRIMA already.

Note: AICPA Members and AICPA.org or aicpastore.com customers will use their existing username and password to access PRIMA. If you received a PRIMA notification to log in, there is nothing else you need to do to get access. If you need to recover your password, please follow the instructions below.

- **If you were sent a username**, please access the site with that username. If you do not know your password to that account, please see Resetting Your AICPA.org/CPA.com Password below.
- **If you were sent an AICPA customer number**, please register using Creating an AICPA.org/CPA.com account and be sure to use that customer number as mentioned in step 3 of those instructions.

Accessing PRIMA

1. Go to prima.aicpa.org. If you are not logged in to AICPA.org or CPA.com, you will be prompted to log in with your AICPA.org/CPA.com credentials.
2. If you do not already have an online account, you will choose “Register using your AICPA member number” if you are an AICPA Member or customer number if you are a previous customer (e.g., if you’ve registered for a conference or have purchased materials, including CPE, from the AICPA) to setup a new account.
 - If your firm has undergone a peer review with the same administering entity, you probably have a user account in PRIMA.
 - If you are unsure what email address is associated with your account, please [click here](#) to enter in different email addresses that the system will check to see if are associated with an account.

Resetting Your AICPA.org/CPA.com Password

To retrieve your password on the AICPA website:

1. Go to <https://login.aicpa.org/>
2. Click Forgot Password on the sign-in screen
3. Enter the email address associated with your AICPA account
4. Click the Submit button

Your reset password will be emailed to you.

To change your password on the AICPA website, please Sign In to your account following the steps below:

1. Go to <https://www.aicpa.org/>
2. Click on My Account at the top of the page
3. Click on Change Password under Settings

If you need additional assistance, please contact Member Service at service@aicpa.org or 888.777.7077 M–F 9am–6 pm ET.

Updating Your Account Profile

Associating Yourself with a Public Accounting Firm

You will not be able to access PRIMA if you are not associated with a public accounting firm in our records.

To add a relationship to a public accounting firm online:

1. [Sign in](#) to AICPA.org
2. Click on **My Account**
3. Click on **Employer Information**
4. Click on **Add Employer**
5. Enter your employer name. (You may also enter city, state, and postal code information to narrow your search).
6. Click on **Search**

If an organization matches your search:

1. Select the radio button next to the best match
2. Click on **Choose this organization**
3. Select your position from the drop-down
4. Select Public Accounting from the drop-down
5. Select your email address from the drop-down or click on **Add** to the right of the Email drop-down
6. If you are adding an email address, enter the address and click on **Save**
7. Select your phone number from the drop-down or click on **Add** to the right of the Phone drop-down
8. If you are adding a phone number, enter the phone number and click on **Save**
9. Click on **Add Position**

If no organization matches your search, do not click on None of These Match My Organization. You will not be able to create a new public accounting firm online. Please see [Creating a Public Accounting Firm](#).

Updating Your Position

You will not be able to enroll your firm in peer review if there is not at least one customer record associated with your firm that is identified as a partner/owner of your firm.

To update your position online:

1. [Sign in](#) to AICPA.org
2. Click on **My Account**
3. Click on **Employer Information**
4. Click on **Edit**
5. Select the appropriate position from the drop-down
6. Click on **Save**

Business Category

You will not be able to access PRIMA or enroll your firm in peer review if it is not correctly identified as a public accounting firm in our records. If your existing firm record has an incorrect business category (e.g., business and industry, consulting firm, etc.), please call 888.777.7077 to speak to a member of our Member Services team to request your firm record be updated to public accounting.

To view the business category of your organization:

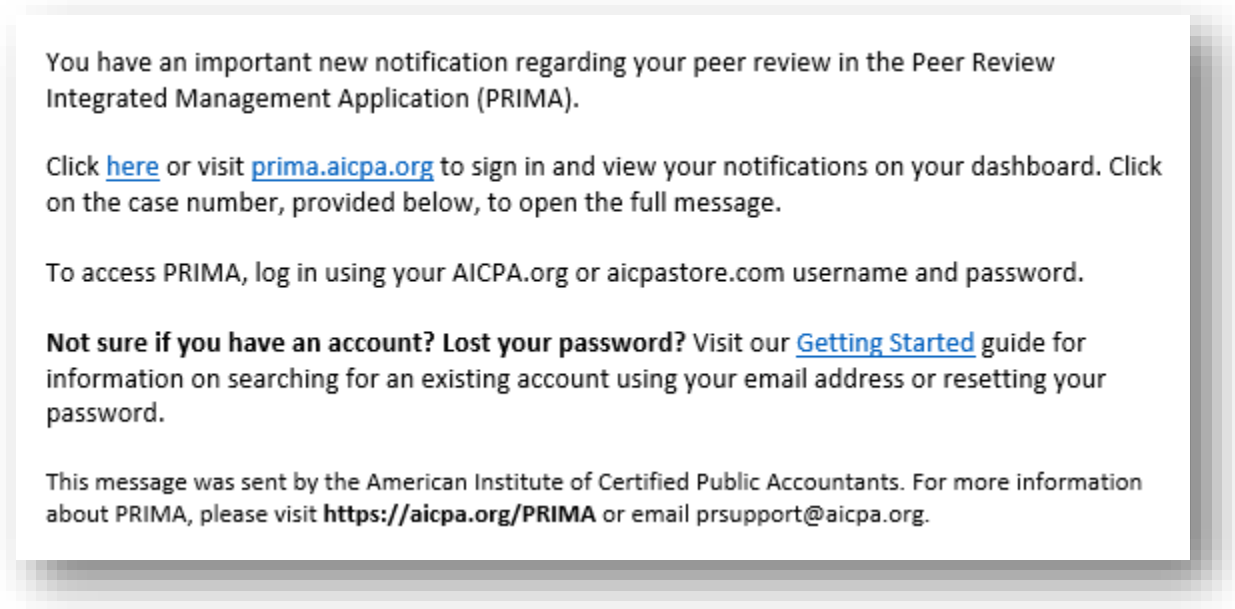
1. [Sign in](#) to AICPA.org
2. Click on **My Account**
3. Click on **Employer Information**
4. Click on **Edit**

The business category of your organization is below the field indicating your Position at that organization.

Communications from PRIMA

Please add prima@aicpa.org to your contact list or safe sender list to ensure you receive peer review related communications.

Email notifications will look like the sample below.



PRIMA Home Page

Your PRIMA home page includes:

Announcements

The Announcements section is at the top of the page and will include important information from the AICPA such as PRIMA changes, upcoming training dates, prima maintenance schedule and more.

Action Items

Actions requiring your entry or response, including your peer review information (PRI), scheduling, corrective action, implementation plan and review cases. For reviewers, this will also display review-related cases that require your entry or response.

Please note: This link will not appear if no action is required on your part.

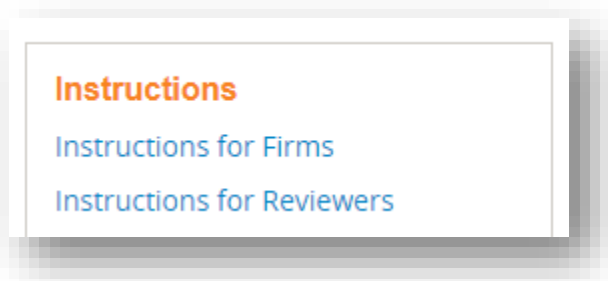
Letters and Important Information

Letters or important peer review communications sent to you and/or your firm.

Peer Review Knowledge Base

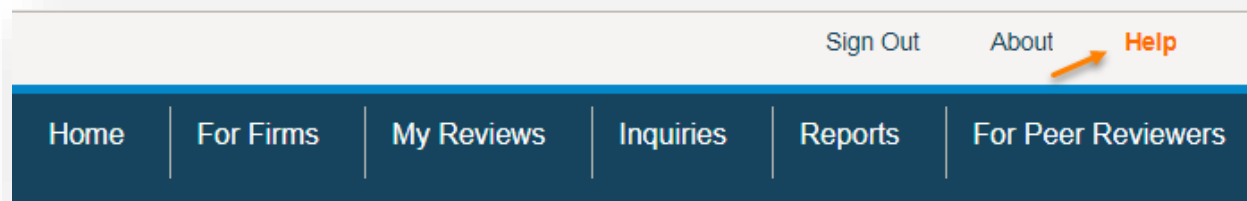
The AICPA Peer Review Program has developed a knowledge base for peer review users. The Knowledge Base contains many helpful articles to assist you in PRIMA. There are two articles titled “Instructions for Peer Reviewers Using PRIMA” and “Instructions for Firms Using PRIMA” that walk each user through the peer review process, linking to articles with screenshots, instructions and short training videos. These two articles can be accessed from the “Instructions” box located at the top of your home page.

You can also search for them in the Knowledge Base by typing “instructions” with quotation marks in the search field and pressing Enter on your keyboard. Scroll through the results until you find instructions for firms and reviewers. We will continue to add and update articles to address frequently asked questions or for any programming changes.



To access the Knowledge Base:

1. Sign in to PRIMA at prima.aicpa.org.
2. Click the orange **Help** link in the upper right-hand corner.



Managing Partner and Peer Review Contacts

One or two individuals are associated with a firm in PRIMA, the Managing Partner and Peer Review Contact. These individuals need to be partners at the firm as they make acknowledgements on behalf of the firm. The Managing Partner and Peer Review Contact receive email notifications and letters via PRIMA and perform actions on behalf of the firm. If you need to change your position at your firm, refer to Updating Your Position above.

The Managing Partner can change the Managing Partner or the Peer Review Contact through going to For Firms and then updating enrollment. Once an update is initiated, it will appear under Action Items, until it is submitted. Only one case may be open at a time.

The Peer Review Contact can change these individuals when completing the Peer Review Information (PRI) Request prior to the scheduling of the peer review.

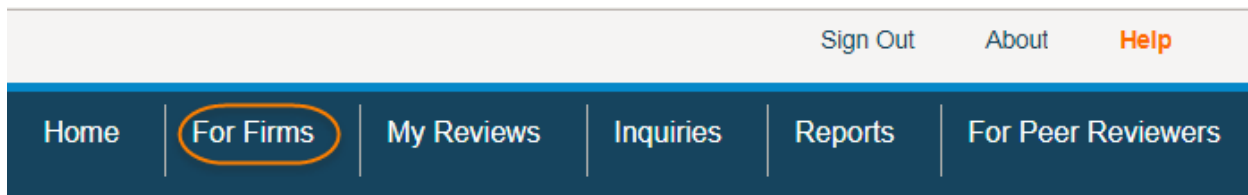
Please note: Users cannot currently update the Managing Partner or Peer Review Contact once your Peer Review Information form (PRI case) has been submitted. If you need to change Managing Partner or Peer Review Contact but are unable to make this change in PRIMA, please email prsupport@aicpa.org and provide the name, email address and AICPA member/customer number (if available).

Enrollment in AICPA Peer Review Program

Three types of firms have their peer reviews administered within PRIMA:

- Firms with AICPA members enrolled in the AICPA Peer Review Program
- Firms with no AICPA members enrolled in the AICPA Peer Review Program
- Firms with no AICPA members enrolled in a state CPA society peer review program

The functionality for all three types of firms is the same within PRIMA. Firms with no AICPA members may enroll in the AICPA Peer Review Program within PRIMA by clicking For Firms and then selecting “Change Peer Review Program.”



Who do I contact for help?

The AICPA Peer Review Program provides PRIMA support. Contact us at 919.402.4502 or prsupport@aicpa.org. For assistance with your AICPA.org/CPA.com account, contact AICPA Member Service at service@aicpa.org or 888.777.7077. Staff are available from 8am – 6pm ET.

Login error messages

Some users experience an issue and receive the following message when attempting to log in to PRIMA:

“Unable to process the SAML WebSSO request: User does not exist in PRIMA. Please contact system administrator.”

Unfortunately, Peer Review staff cannot resolve this issue by phone as this requires a fix by our IT support team. **When logging in, if you experience this error or any other issue**, email prsupport@aicpa.org and provide your name, username (i.e., primary email address) and a screenshot of the issue, if available. This will open a support case that Peer Review staff can submit to our IT support team to address this issue.

Browser Compatibility

PRIMA supports Apple’s [Safari](#), Google’s [Chrome](#), Microsoft’s [Internet Explorer](#) 11+ and Mozilla’s [Firefox](#) web browsers.

PRIMA Frequently Asked Questions

[PRIMA FAQs for Enrolled Firms and Peer Reviewers](#)