



[Home](#) > [Entering Engagement Summary on Engagement Reviews \(Firms\)](#)

Entering Engagement Summary on Engagement Reviews (Firms)

Average 0.0

Share

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 application interface. At the top, there is a purple header with the AICPA logo and 'PRIMA' text. On the right side of the header, there are icons for notifications (with a '1' badge), a bell, and a help icon. A left sidebar contains navigation icons for Home, a search icon, a list icon, a document icon, and a refresh icon.

The main content area is titled 'Home' and displays a progress bar for a review process. The progress bar consists of several steps: 'Peer Review Information (PRI) Form', 'Scheduling (SCH) Form', 'Review In Progress' (highlighted in green), 'Administrative Review', 'Technical Review', and 'Committee Review'. Below the progress bar, there are two tabs: 'Action Items' (selected) and 'My Firm's Open Reviews'. The 'Action Items' tab shows a table with one item. The table has columns for 'Case ID', 'Review No.', 'Name & Number', 'Task Description', 'Received Date', and 'My Role'. The 'Case ID' cell for the first row is highlighted with an orange circle and contains the text 'RVW-'. The 'Task Description' is 'Review in Progress', 'Received Date' is '09/02/2020', and 'My Role' is 'Firm'. A 'See All' link is located to the right of the table. At the bottom right of the table area, there is a 'Feedback' button. The footer contains copyright information for the American Institute of Certified Public Accountants and contact information: 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org'.

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

The screenshot shows the AICPA PRIMA application interface. At the top, there is a purple header with the AICPA logo and 'PRIMA' text. On the right side of the header, there are icons for a notification (with a '1' badge), a bell, and a question mark. Below the header is a navigation bar with 'Home' and 'RVW-' tabs. A sidebar on the left contains navigation icons. The main content area has a 'Show all steps' link and two tabs: 'To Do' (selected) and 'Additional Information'. Under 'To Do', there are sections for 'Review process To PRC' and 'Review in Progress'. A table displays review details:

Firm Name	Review Due Date	ReviewNumber
Team Type	Review Status	
FOF	Pending - Working Papers	

Below the table, there are tabs for 'Firm/Team Summary', 'Review Summary' (highlighted with an orange circle), and 'Matters'. A 'Print Review Summary' button is located to the right. A section titled 'Instructions for Firm in Review Summary' contains a list of instructions:

- Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.
- The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.
- Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.
- Each monthly compilation or preparation engagement counts as one engagement (in the Population column).

The footer contains copyright information for 2020 American Institute of Certified Public Accountants and contact details: Phone: 919.402.4502 | Email: prsupport@aicpa.org.

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

Home RVW-

Instructions for Firm in Review Summary ?

- Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.
- The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.
- Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.
- Each monthly compilation or preparation engagement counts as one engagement (in the Population column).

Partner Name

Code	Level Of Service	Industry	Population
45	Compilations of financial statements that omit substantially all disclosures	Other healthcare entities	1

+ Add Level Of Service

+ Add Partner

Save Send to Captain

©2020 American Institute of Certified Public Accountants Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org

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 PRIMA application interface. At the top, there is a purple header with the AICPA logo and the text 'PRIMA'. On the right side of the header, there are icons for user profile, notifications, and help. Below the header, the main content area is titled 'Home' and 'RVW-'. It contains a section titled 'Instructions for Firm in Review Summary' with three bullet points: 'Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.', 'The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.', and 'Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form. Each monthly compilation or preparation engagement counts as one engagement (in the Population column)'. Below the instructions is a form with a 'Partner Name' input field and a table. The table has columns for 'Code', 'Level Of Service', 'Industry', and 'Population'. One row is visible with '45' in the Code column, 'Compilations of financial statements that omit substantially all disclosures' in the Level Of Service column, 'Other healthcare entities' in the Industry column, and '1' in the Population column. Below the table, there are two buttons: '+ Add Level Of Service' (circled in orange) and '+ Add Partner'. At the bottom of the form, there are 'Save' and 'Send to Captain' buttons. The footer contains copyright information for the American Institute of Certified Public Accountants and contact information: 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org'.

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

The screenshot shows the PRIMA application interface. At the top, there is a purple header with the AICPA PRIMA logo and navigation icons. Below the header, the breadcrumb navigation shows 'Home' and 'RVW-'. The main content area is titled 'Instructions for Firm in Review Summary' and contains a list of instructions:

- Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.
- The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.
- Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.
- Each monthly compilation or preparation engagement counts as one engagement (in the Population column).

Below the instructions is a form for entering partner details. It includes a 'Partner Name' input field and a table with the following columns: Code, Level Of Service, Industry, Population, and three empty columns. The table contains one row with the following data:

Code	Level Of Service	Industry	Population			
45	Compilations of financial statements that omit substantially all disclosures	Other healthcare entities	1			

Below the table are two buttons: '+ Add Level Of Service' and '+ Add Partner'. The '+ Add Partner' button is highlighted with an orange circle. At the bottom of the form are two buttons: 'Save' and 'Send to Captain'. The footer of the page contains copyright information for the American Institute of Certified Public Accountants and contact information.

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

The screenshot shows the PRIMA application interface. At the top, there is a purple header with the AICPA logo and the text 'PRIMA'. On the right side of the header, there are icons for user profile, notifications, and help. Below the header, the main content area is titled 'Home' and 'RVW-'. It contains a section titled 'Instructions for Firm in Review Summary' with three bullet points: 'Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.', 'The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.', and 'Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.' Below the instructions is a form with a 'Partner Name' field and a table. The table has columns for 'Code', 'Level Of Service', 'Industry', and 'Population'. One row is filled with '45', 'Compilations of financial statements that omit substantially all disclosures', 'Other healthcare entities', and '1'. Below the table are buttons for '+ Add Level Of Service' and '+ Add Partner'. At the bottom of the form area are 'Save' and 'Send to Captain' buttons. The footer contains copyright information for the American Institute of Certified Public Accountants and contact details.

Instructions for Firm in Review Summary

- Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.
- The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.
- Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.
- Each monthly compilation or preparation engagement counts as one engagement (in the Population column).

Code	Level Of Service	Industry	Population				
45	Compilations of financial statements that omit substantially all disclosures	Other healthcare entities	1				

+ Add Level Of Service
+ Add Partner

Save Send to Captain

©2020 American Institute of Certified Public Accountants Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org

Related Articles:

[Submitting Working Papers in PRIMA](#)

©2020 American Institute of Certified Public Accountants. All rights reserved.