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Requesting Extension for Implementation Plan (Firm)

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To request an extension on an implementation plan through the implementation plan case in PRIMA, perform the following steps.

1. Under **Action Items**, click the implementation plan (IMP) **Case ID**.

The screenshot shows the PRIMA system interface. The top navigation bar includes the AICPA logo, the text 'PRIMA', and icons for notifications, help, and user profile. The main content area is titled 'Home' and shows a progress bar for the review process: 'Peer Review Information (PRI) Form' > 'Scheduling (SCH) Form' > 'Review In Progress' > 'Administrative Review' > 'Technical Review' > 'Committee Review' > 'Corrective Actions/Implementation Plans'. Below this, the 'Action Items' section is active, showing 'My Firm's Open Reviews'. A table lists the action items, with the first item highlighted by an orange box. The table has columns for Case ID, Review No., Name & Number, Task Description, Received Date, and My Role.

Case ID	Review No.	Name & Number	Task Description	Received Date	My Role
IMP-			Complete Implementation Plan	07/23/2020	Firm

2. View the **Instructions** and **Review Details**.

Home **IMP-**

Show all steps

To Do **Additional Information**

Perform Followup

Complete Implementation Plan

Instructions

- For the Action to Take, please select Complete, Request Waiver, or Request Replacement from the drop-down below. Waivers and Replacements are rare and will only be approved for appropriate scenarios under guidance. Please see Chapter 6, Section 3300 Report Acceptance Body (RAB) Handbook of the AICPA Peer Review Program Manual for further information on when they are appropriate.
- If you select an Action to Take and it is not approved, your administering entity will request that you make revisions within PRIMA.
- After you select the Action to Take, please upload your supporting documents.
- If revisions are requested, review the revision notes at the top of the screen and make changes as needed. If you have any questions, call your administering entity.

Review Details

Review Number	Review Type Engagement Review	Team Type FOF
Firm Name	State MD	Firm Number
RAB Code MDRAB	Meeting Date 07/23/2020	Review Status Resolved-Review-Complete

Implementation Plan Details

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3. View the **Implementation Plan Details**.

Home **IMP-**

RAB Code Meeting Date Review Status
07/23/2020 Resolved-Review-Complete

Implementation Plan Details

IMP Code 072	IMP Code Description Submit Evidence of Proper Firm Licensure	Original Date Action Should Be Completed 12/31/2020
-----------------	--	--

IMP Letter Description
Submit evidence of proper firm licensure to the Committee by December 31, 2020.

Action To Be Taken **▼** --Select--

Comments

Request Extension

Help **Submit**

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4. Click **Request Extension**.

Home IMP-

KRB Code Meeting Date 07/23/2020 Review Status Resolved-Review-Complete

Implementation Plan Details

IMP Code 072 IMP Code Description Submit Evidence of Proper Firm Licensure Original Date Action Should Be Completed 12/31/2020

IMP Letter Description
Submit evidence of proper firm licensure to the Committee by December 31, 2020.

Action To Be Taken --Select--

Comments

Request Extension

Help Submit

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5. A pop-up confirmation message will be displayed, asking you to confirm the extension request. Click **Continue** to move forward.

Home IMP-

Implementation Plan Details

IMP Code 072 IMP Code Description Submit Evidence of Proper Firm Licensure Original Date Action Should Be Completed 12/31/2020

IMP Letter Description
Submit evidence of proper firm licensure to the Committee by December 31, 2020.

Action To Be Taken --Select--

Comments

Request Extension

Upload Waive/Replace Documentation

Document Type	Document name	Description	Upload	Delete
Waive/Replace Documentation	test 1 .pdf	Waive/Replace Documentation		

Request Extension Pop up

You will now be taken to a different screen to request the extension of this COA/IMP. Click continue to go to the next screen. Click cancel to go back.

Continue **Cancel**

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6. You will be taken to a new screen to process your Firm Self Service request for the extension.

Under the **Pending COA/IMP Due Date Extension Request** section, you can view your firm information and the associated implementation plan details.

Home **IMP-** **FSS-**

Show all steps

To Do **Additional Information**

COA/IMP Extension

Pending COA/IMP Due Date Extension Request

Firm Number	Firm Name	Address1	Address2	City	State	Zip
				Baltimore	MD	

Case ID: IMP- Follow Up Code: 072 Follow Up Description: Submit Evidence of Proper Firm Licensure

Due Date: 12/31/2020

Requested New COA/IMP Due Date:

Please provide a written explanation of your firm's need for an extension for the selected corrective action or implementation plan.

Remainder: 356 characters

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- Under the **Requested New COA/IMP Due Date** section, enter in or use the calendar icon to select the requested due date.

Home **IMP-** **FSS-**

Due Date: 12/31/2020

Requested New COA/IMP Due Date:

firm's need for an extension for the selected corrective action or implementation plan.

Document No	Document Type	Document name	Description	Upload	Delete
No content available					

[+Add document](#)

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- Provide a **written explanation** in the comments box for the requested due date.

Requested New LOA/IMP Use Date

Please provide a written explanation of your firm's need for an extension for the selected corrective action or implementation plan.

Remaining: 256 characters

Firm Documents

Document No	Document Type	Document name	Description	Upload	Delete
1	Support for COA/IMP Extension	test 1 .pdf	Support for COA/IMP Extension		

+ Add document

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- Click the **Plus (+)** icon under **Firm Documents** to upload any applicable documentation for your request. This step is optional.

Please provide a written explanation of your firm's need for an extension for the selected corrective action or implementation plan.

Remaining: 256 characters

Firm Documents

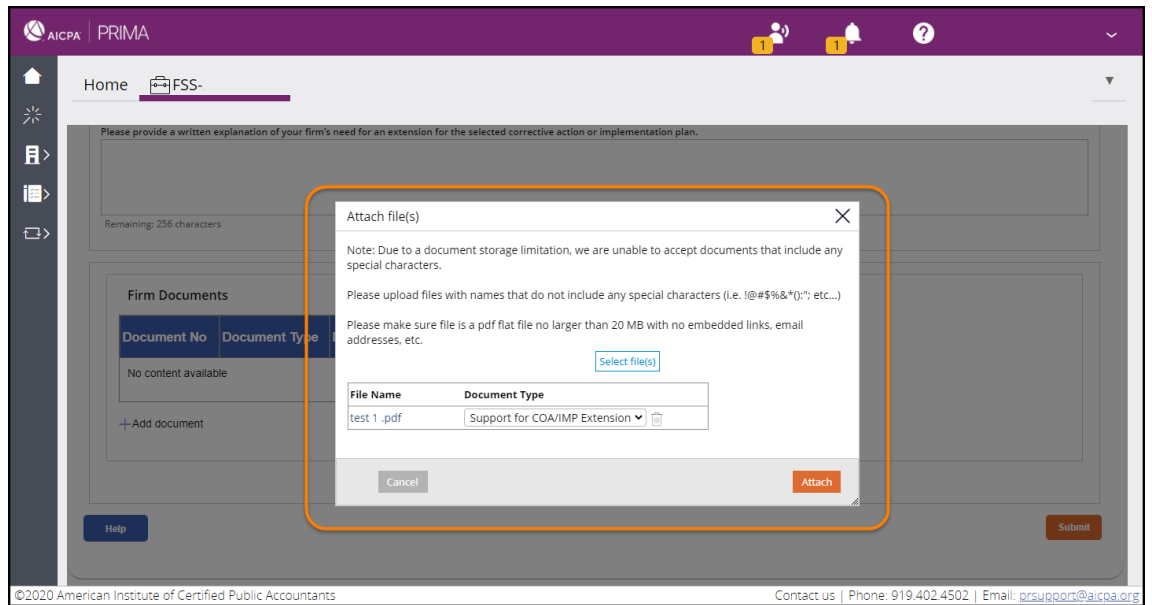
Document No	Document Type	Document name	Description	Upload	Delete
No content available					

+ Add document

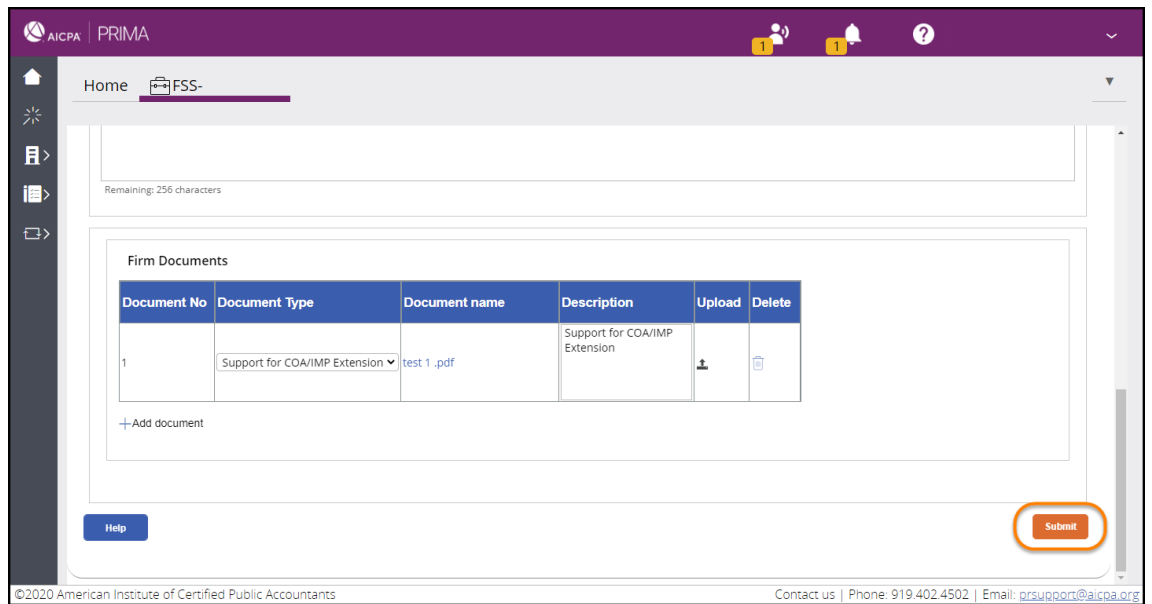
Help Submit

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- Upload your file by clicking **Select File** and then click **Attach**. See the [Uploading Documents in PRIMA](#) article for detailed instructions on how to upload documents.



11. Once complete, click **Submit** to send the request to your administering entity.



Next Steps:

- Your extension request will go to your administering entity for approval. It may also need to go to a Report Acceptance Body (RAB) for approval.
- Your request may be approved as requested or it may be altered (a shorter or longer extension granted).
- You will be notified by an Important Information email from PRIMA when a letter is issued to your Letters area of PRIMA.
- Any approved changes in due date will flow through to your implementation plan case.