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Opting in or out of Sharing Peer Review Information

Share

Average 0.0

Beginning mid-December 2019, firms enrolled in the AICPA Peer Review Program or state society peer review program (Program) have had the opportunity to make a selection to share certain enrollment information and/or objective peer review information with state boards of accountancy (SBOAs) while scheduling their peer review.

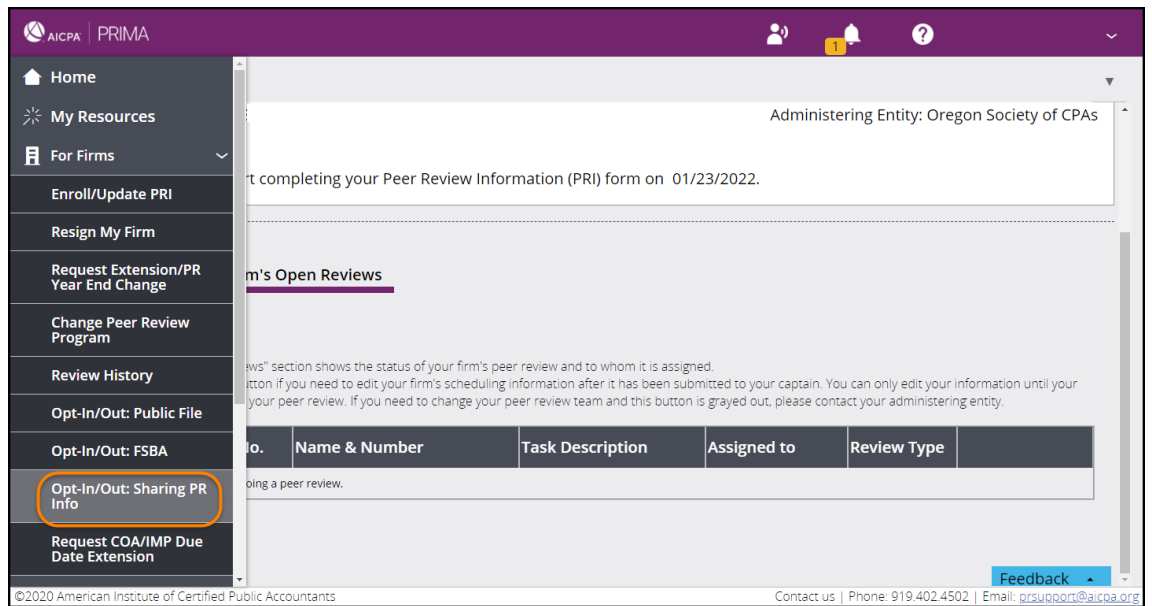
The **Opt-in/Out: Sharing PR Info.** program enables firms to change the selection made when enrolling in the Program or scheduling their peer review and it also enables firms that scheduled their reviews prior to mid December 2019 to make objective peer review information available to SBOAs.

To make a selection to share enrollment information and/or objective peer review information or to change your selection, perform the following steps:

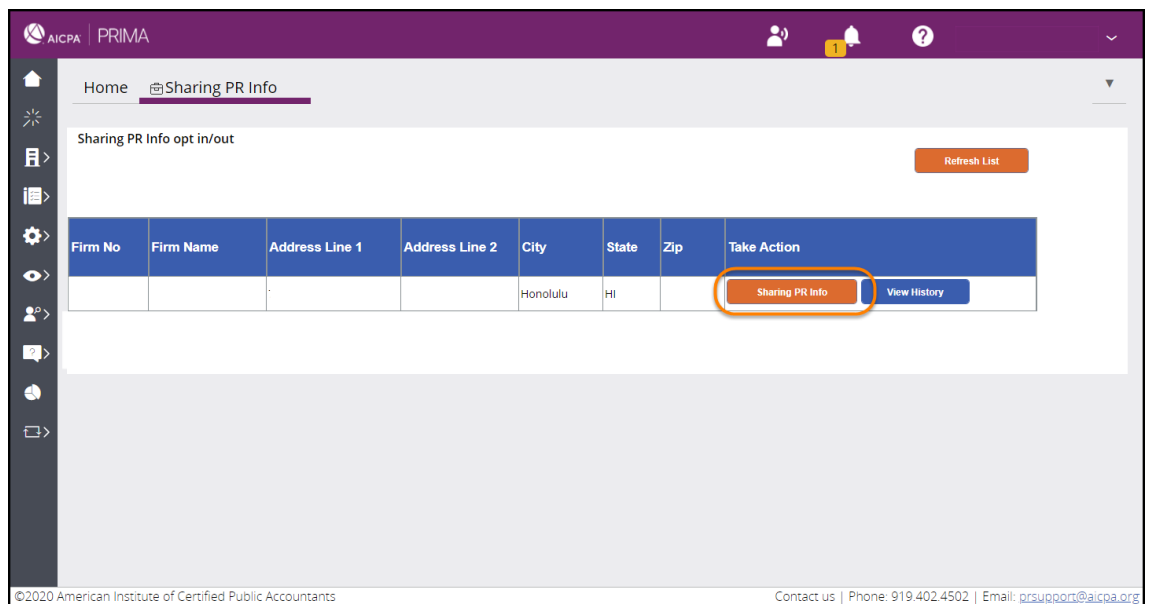
1. Click **For Firms**.

The screenshot shows the AICPA PRIMA web application interface. On the left, a dark sidebar contains a navigation menu with the following items: Home, My Resources, For Firms (highlighted with an orange circle), My Work, Miscellaneous Utilities, Review Utilities, Reviewer Utilities, Inquiries, Reports, and For Peer Reviewers. The main content area has a purple header with the AICPA PRIMA logo and user icons. Below the header, it displays 'Administering Entity: Oregon Society of CPAs' and a notification about completing the Peer Review Information (PRI) form on 01/23/2022. The main content area is titled 'Firm's Open Reviews' and contains a table with columns: No., Name & Number, Task Description, Assigned to, and Review Type. The footer includes copyright information for 2020 American Institute of Certified Public Accountants and contact details for the Oregon Society of CPAs.

2. Click **Opt-in/Out: Sharing PR Info**.



3. Locate the appropriate firm and click **Sharing PR Info**.



4. To change your firm's previous selection or to make a selection to share certain enrollment information or objective peer review information, click **Change**.

The screen below explains the enrollment and/or objective peer review information that will be made available to state boards of accountancy if you choose to share information with SBOAs.

The screenshot shows the AICPA PRIMA 'New' page. The top navigation bar includes 'Home', 'Sharing PR Info', and 'New'. The main content area contains two sections: 'Share Enrollment Information' and 'Share Additional Peer Review Information'. Both sections have a 'Current Status' field set to 'Opt-in' and a 'Change' button highlighted with an orange box. The footer includes copyright information for 2021 American Institute of Certified Public Accountants and contact details.

After clicking **Change** on the above buttons, in this example, the current status is updated to **Opt-in**. To change to **Opt-out**, click the **Change** buttons again.

This screenshot shows the same AICPA PRIMA 'New' page after the status change. The 'Current Status' for both 'Share Enrollment Information' and 'Share Additional Peer Review Information' is now 'Opt-in', which is highlighted with an orange box. The 'Change' buttons remain visible. A 'Submit' button is now visible at the bottom right of the form area. The footer information is consistent with the previous screenshot.

If you do not want your firm's enrollment information or objective peer review information to be available to SBOAs, click the Change button beneath the Current Status of each option and the Current Status will read Opt-Out.

If the Change button is disabled, take your mouse and hover your cursor over the Change button and a pop up message will appear explaining the reason the change can not be made at this time. The Change button can be disabled for two reasons:

- 1) your firm's scheduling case is open,
- 2) your firm did not participate in FSBA or the SBOA where your firm's home office is located is not permitted access to peer review results.

If you have an open scheduling case and the scheduling case is in your action items, you can update your sharing peer review information selections in the scheduling case itself. See [Entering Review Scheduling Information in PRIMA \(Firm\)](#) for instructions.

If the scheduling case is not currently assigned to you, you will need to wait to update your selections until the scheduling case has been approved. Once approved, you can update through the For Firms self-service and follow the instructions outlined within this article.

If you did not participate in FSBA and wish to do so, see [Opting in or out of Facilitated State Board Access \(FSBA\)](#) for instructions.

The screenshot shows the 'New' form in the PRIMA system. The form is titled 'New' and has a sidebar with navigation icons. The main content area contains a list of instructions for sharing peer review information. Below the instructions, there are two sections: 'Share Enrollment Information' and 'Share Additional Peer Review Information'. The 'Share Enrollment Information' section shows 'Current Status: Opt-out' and a 'Change' button. The 'Share Additional Peer Review Information' section shows 'Current Status: Opt-out' and a 'Review Number:' field with a 'Change' button. A 'Submit' button is located at the bottom right of the form.

o Indication of whether your firm has an accounting and auditing practice or does not have an A&A practice

- If you choose to click the 'Change' button to share additional peer review information with state board(s) of accountancy, the following information will be provided:
 - o Extension letter(s) which includes the peer review due date that has been approved by the administering entity, if applicable
 - o Date of the letter acknowledging the peer review has been scheduled
 - o Estimated date the firm's review is scheduled to commence
 - o Date peer review documents are due to be received by the administering entity (peer review due date)
- To view the state boards that you have previously expanded access to, click on For Firms then Opt-In/Out: FSBA.

Share Enrollment Information
Current Status: Opt-out
[Change](#)

Share Additional Peer Review Information
Current Status: Opt-out
Review Number:
[Change](#)

[Submit](#)

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5. Click **Submit** once you have updated your selections.

This screenshot is identical to the one above, showing the 'New' form in the PRIMA system. The 'Submit' button at the bottom right of the form is highlighted with an orange border, indicating the next step in the process.

o Indication of whether your firm has an accounting and auditing practice or does not have an A&A practice

- If you choose to click the 'Change' button to share additional peer review information with state board(s) of accountancy, the following information will be provided:
 - o Extension letter(s) which includes the peer review due date that has been approved by the administering entity, if applicable
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Share Enrollment Information
Current Status: Opt-out
[Change](#)

Share Additional Peer Review Information
Current Status: Opt-out
Review Number:
[Change](#)

[Submit](#)

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Related Articles:

[Entering Review Scheduling Information in PRIMA \(Firm\)](#)
[Opting in or out of Facilitated State Board Access \(FSBA\)](#)

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