Updating PRI Initiated by Reviewer (Firm)

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During the review, the reviewer can request revisions to PRI form and the request will be sent to the firm as an update (UPD) case. Additionally, the reviewer can update the firm's PRI and the summary of changes will be sent to the firm for approval as a UPD case. These changes will update the PRI and, if applicable, allow the firm to change the review type. The firm may be required to resubmit their scheduling information to validate their review team's qualifications. Reasons for updating may include:

- Adding or removing levels of service (engagement types)
- Adding or removing practice area codes
- Adding or removing industry codes
- Changing review type

Note: Once your enrollment update has been submitted, scheduling checks may or may not run depending on the change. If there are any identified scheduling errors, they will need to be addressed.

Whether self initiated or by reviewer request, if no updates are needed, you can open the update (UPD) case and click **Delete Update** to close the case. **Delete Update** will close the case and negate any changes made. **Note:** The Delete Update button will not be available if the reviewer made revisions on your behalf.

If the review has already been assigned to a Report Acceptance Body (RAB) or the RAB has made an acceptance decision, you will not be able to request or make updates.
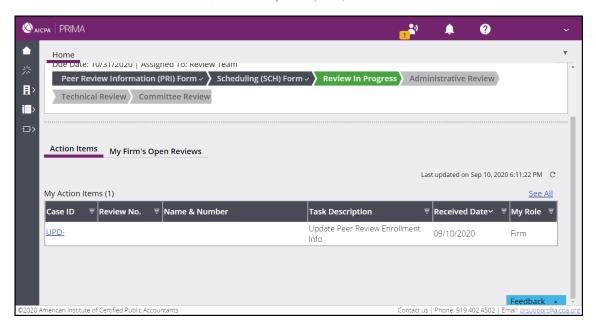
Note: For each of the sections below, you will see a purple header accompanied with an up arrow. Clicking on the arrow will expand and collapse each region, displaying additional information.

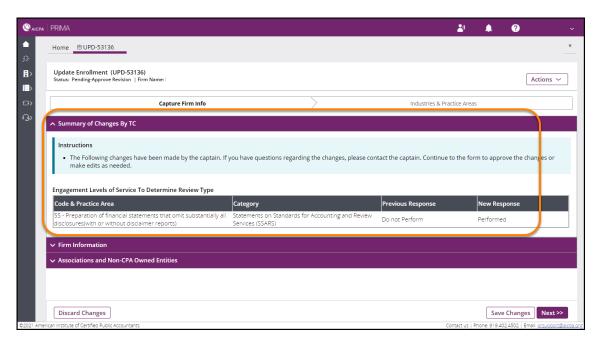| ⌄ Engagement Levels of Service to Determine Review Type |
|---|
| ⌄ PCAOB Reports |

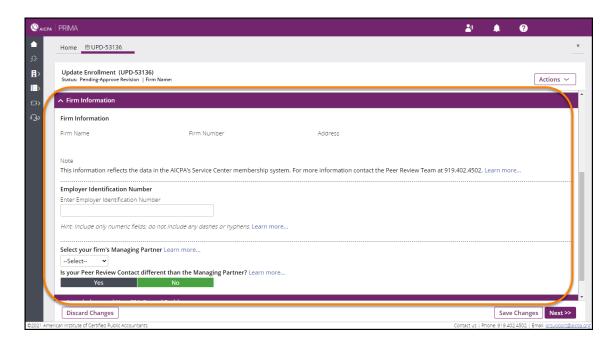To update the PRI initiated by the reviewer, perform the following steps:

1. If a reviewer requested the update through PRIMA or made updates to the firm's PRI, the case will be under the firm's **Action Items**, click the update (UPD) **Case ID**.
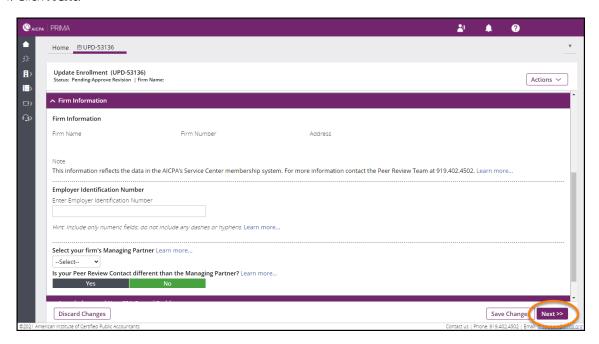

2. If the reviewer made updates to the PRI, the summary of those changes will be listed on the first page. Review the **Summary of Changes by TC**. Click **Next**.
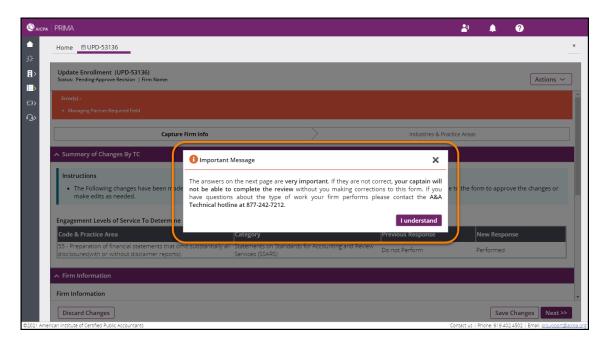

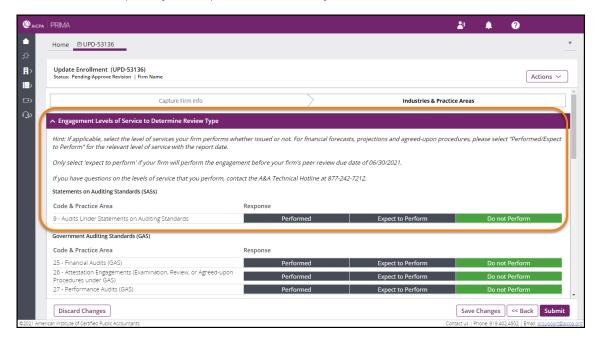3. Review **Firm Information**. Update details, if needed.

4. Click **Next**.

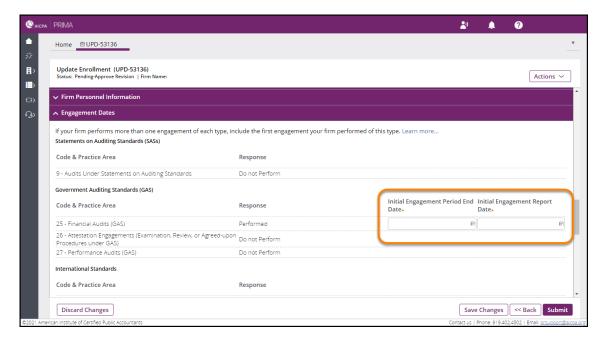5. You will receive a pop-up. Click **I understand** to move to the next page.

6. Review **Levels of Service**, **PCOAB Reports**, **Independence Standards**, **Engagements**, and **Practice Areas**. Update your responses as necessary.
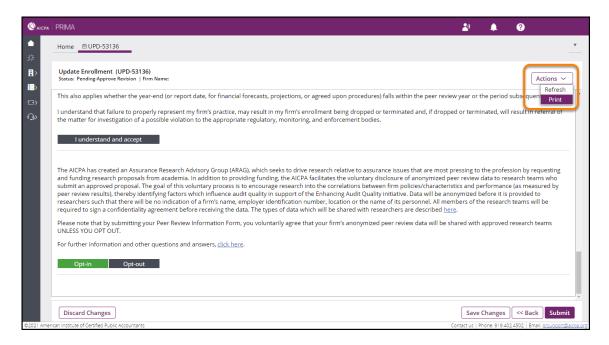

7. Enter **Engagement Dates** for any new engagements selected on your **Industries & Practice areas**.

   Note: This step will not show if you have no new selections from your **Industries & Practice areas.**
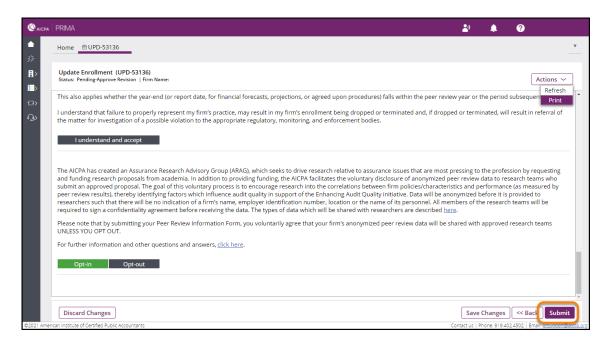
8. Review the **Summary**. To print the summary before submitting, click **Print**.

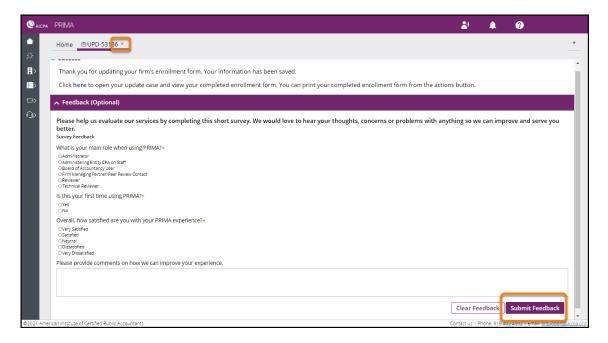9. Review **Acknowledgements** and click **Submit** to confirm any updates.

Note: The changes won't be made until the UPD case is submitted.

10. The **Feedback** section is optional. Your feedback is encouraged as it helps us to improve the PRIMA systems for future improvements.

To provide feedback, click the radio buttons next to your responses and click **Submit Feedback.**

If you do not want to provide feedback, close the tab by selecting the **"X"** at the top of the tab. **Note:** You will need to hover your mouse over the tab to reveal the **"X"**.

Related Article:

Codes Used in PRIMA

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