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[Home](#) > Submitting Firm Peer Review Information (PRI) in PRIMA

## Submitting Firm Peer Review Information (PRI) in PRIMA

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For video instructions, see [Submitting Firm Peer Review Information \(PRI\) in PRIMA - Video](#).

**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 complete the Peer Review Information form, perform the following steps:

1. Under **Action Items**, click the Peer Review Information (PRI) **Case ID**.

The screenshot shows the PRIMA interface with a purple header. The main content area displays the 'Peer Review Information (PRI) Form' with a progress bar showing 'Scheduling (SCH) Form', 'Review In Progress', and 'Administrative Review'. 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: 'PRI- Complete Peer Review Info' with a received date of '07/13/2020' and role of 'Firm'. The footer contains copyright information for 2020 American Institute of Certified Public Accountants and contact details.

| Case ID | Review No. | Name & Number | Task Description          | Received Date | My Role |
|---------|------------|---------------|---------------------------|---------------|---------|
| PRI-    |            |               | Complete Peer Review Info | 07/13/2020    | Firm    |

2. Review **Firm Information** by clicking on the arrow to expand the section. Clicking on the arrow again will collapse the section.

**Note:** This information reflects the data in the AICPA's Service Center membership system. You may update the information by contacting the Peer Review Team at 919.402.4502.

The screenshot shows the AICPA PRIMA interface for a Peer Review Information (PRI-589248) record. The 'Firm Information' section is expanded, showing fields for Firm Name, Firm Number, and Address. Below these fields is a note stating: 'This information reflects the data in the AICPA's Service Center membership system. For more information contact the Peer Review Team at 919.402.4502. Learn more...'. The 'Employer Identification Number' section is also expanded, showing a text input field with the value '999999999' and a hint: 'Hint: Include only numeric fields; do not include any dashes or hyphens. Learn more...'. Below the EID field is a dropdown menu for 'Select your firm's Managing Partner' with the value '--Select--'. At the bottom of the section are buttons for 'Discard Changes', 'Help', 'Save Changes', and 'Next >>'. The footer of the page includes the copyright notice '©2021 American Institute of Certified Public Accountants' and contact information: 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org'.

3. If applicable, select any **Associations** your firm is a member of by checking the box. If you need to remove an Association, uncheck the checkbox.

If your association is not included in the list, click **Add association name** to manually enter your association's name.

**Note:** If you clicked the **Add association name** button in error, you will need to click on the trash icon in order to move forward.

The screenshot shows the AICPA PRIMA interface for the same Peer Review Information (PRI-589248) record. The 'Associations and Non-CPA Owned Entities' section is expanded, showing a list of associations with checkboxes for selection. The list includes: AICPA International, Affiliated Conference of Practicing Accountants, AG Exchange, AGN International North America, Alliance of Practicing CPAs, The, Allinial Global, and Allott Group. Below the list is a section for 'Other association name' with a text input field and a button labeled '(+) Add association name'. At the bottom of the section are buttons for 'Discard Changes', 'Help', 'Save Changes', and 'Next >>'. The footer of the page includes the copyright notice '©2021 American Institute of Certified Public Accountants' and contact information: 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org'.

4. If applicable, select any **Non-CPA owned entities** your firm is a member of.

If your Non-CPA owned entity is not included in the list, click **Add other non-CPA owned entity** to manually enter your entities name.

The screenshot shows the 'Peer Review Information' form for PRI-589248. The status is 'Open-PRI-Requested'. The firm name is entered. Below the firm name, there is a list of Non-CPA Owned Entities with checkboxes: Lone Star Management Group, MGI North America, Ltd., American Express Tax and Business Services, CBIZ, Inc, and RSM McGladrey Services. An orange box highlights the 'Add other non-CPA owned entity' link at the bottom of the list. The form also includes a 'Discard Changes' button, a 'Help' button, a 'Save Changes' button, and a 'Next >>' button.

5. Review Managing Partner and Peer Review Contact information.

**Note:** If the Managing Partner or Peer Review Contact is not visible in the drop down and you are the managing partner, please send an email to [prsupport@aicpa.org](mailto:prsupport@aicpa.org) with your name and email address to update the information in PRIMA.

The screenshot shows the 'Peer Review Information' form for PRI-589248. The status is 'Open-PRI-Requested'. The firm name is entered. Below the firm name, there is a dropdown menu for 'Select your firm's Managing Partner' and a radio button for 'Is your Peer Review Contact different than the Managing Partner?'. An orange box highlights the 'Select your firm's Managing Partner' dropdown menu. The form also includes a 'Discard Changes' button, a 'Help' button, a 'Save Changes' button, and a 'Next >>' button.

6. Click **Next** after reviewing your **Firm Personnel** information.

Home PRI-589248

Peer Review Information (PRI-589248)  
Status: Open-PRI-Requested | Firm Name:

Actions

☐ Lone Star Management Group  
☐ MGI North America, Ltd.

**Other association name**  
If your association is not included in the list above, click Add to manually enter your association's name.  
[\(+\). Add association name](#)

Select the non-CPA owned entity your firm is a member of [Learn more...](#)

**Non-CPA Owned Entity(s)**

☐ American Express Tax and Business Services  
☐ CBIZ, Inc  
☐ RSM McGladrey Services

**Other non-CPA owned entity name**  
If your non-CPA owned entity is not included in the above list, click Add to manually enter your non-CPA owned entity's name.  
[\(+\). Add other non-CPA owned entity](#)

Discard Changes Help Save Changes **Next >>**

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7. Click **I understand** on the pop-up to move forward after reading the important message.

Home PRI-589248

Peer Review Information (PRI-589248)  
Status: Open-PRI-Requested | Firm Name:

Actions

Capture Firm Info Industries & Practice Areas

**Firm Information**

Firm Name

Note  
This information reflects the data in the AICPA

**Employer Identification Number**  
Enter Employer Identification Number:  
999999999

Hint: Include only numeric fields; do not include any dashes or hyphens. [Learn more...](#)

Select your firm's Managing Partner [Learn more...](#)  
Thomas Zitzmann

Discard Changes Help Save Changes **Next >>**

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**Important Message**

The answers on the next page are **very important**. If they are not correct, **your captain will not be able to complete the review** without you making corrections to this form. If you have questions about the type of work your firm performs please contact the A&A Technical hotline at 877-242-7212.

**I understand**

8. Review **Engagement Levels of Service To Determine Review Type**. Update your responses as necessary.

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name:

*Hint: If applicable, select the level of services your firm performs whether issued or not. For financial forecasts, projections and agreed-upon procedures, please select "Performed/Expect to Perform" for the relevant level of service with the report date.*

*Only select 'expect to perform' if your firm will perform the engagement before your firm's peer review due date of 07/31/2022.*

*If you have questions on the levels of service that you perform, contact the A&A Technical Hotline at 877-242-7212.*

**Statements on Auditing Standards (SAS)**

| Code & Practice Area                              | Response  |                   |                |
|---|-----------|-------------------|----------------|
| 9 - Audits Under Statements on Auditing Standards | Performed | Expect to Perform | Do not Perform |

**Government Auditing Standards (GAS)**

| Code & Practice Area  | Response  |                   |                |
|---|-----------|-------------------|----------------|
| 25 - Financial Audits (GAS)   | Performed | Expect to Perform | Do not Perform |
| 26 - Attestation Engagements (Examination, Review, or Agreed-upon Procedures under GAS) | Performed | Expect to Perform | Do not Perform |
| 27 - Performance Audits (GAS)   | Performed | Expect to Perform | Do not Perform |

**International Standards**

| Code & Practice Area | Response |  |  |
|----------------------|----------|--|--|
|----------------------|----------|--|--|

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9. Review **PCAOB Reports** selections. Update your responses as necessary.

If your firm is not registered with the PCAOB, answer **No** to the first question. Selecting **Yes** will populate four **Audit Report** questions, and selecting yes to any of these four questions will generate the final PCAOB report question.

If your firm is registered with the PCAOB, using the categories on the Form 2 submitted to the PCAOB, indicate which services were provided with period ends during your peer review year.

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name:

**PCAOB Reports**

Did/will you submit a Form 2 to the PCAOB that has clients/engagements listed in [Part IV - Audit Clients And Audit Reports](#) (with period ends during your peer review year)? If Yes, indicate which types of engagements were included on your Form 2, only include those engagements that have period ends during your peer review year.

Audit Reports Issued by the Firm for Issuers.

Audit Reports Issued by the Firm for Broker Dealers (including required attestation reports).

Audit Reports for Issuers Where the Firm Played a Substantial Role in the Audit.

Audit Reports for Broker Dealers Where the Firm Played a Substantial Role in the Audit.

Independence Standards

Must-Select & Must-Cover Engagements

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10. Under **Independence Standards**, click the **Independence Standards** link to review the list. Click the checkbox next to the appropriate Standards.

Peer Review Information (PRI-589248)  
Status: Open-PRI-Requested | Firm Name:

Which Independence Standards apply for engagements that you perform?

■ Select all

- ☒ AICPA
- ☐ DOL
- ☐ GAGAS (GAO Yellow Book)
- ☐ IESBA
- ☐ PCAOB
- ☐ SEC
- ☐ Other

[Learn more...](#)

▼ Must-Select & Must-Cover Engagements

▼ Other Practice Areas & Industries

▼ Firm Quality Control

▼ Firm Personnel Information

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11. Click **OK** after reviewing the **Independence Standards Message**.

Peer Review Information (PRI-589248)  
Status: Open-PRI-Requested | Firm Name:

Which Independence Standards apply for engagements that you perform?

■ Select all

- ☒ AICPA
- ☐ DOL
- ☐ GAGAS (GAO Yellow Book)
- ☐ IESBA
- ☐ PCAOB
- ☐ SEC
- ☐ Other

Independence Standards Message

Reminder-SEC Independence standards apply to more than public company audits. Review the Independence Standards [link](#) and select SEC independence and in the Other Practice Areas & Industries sections, if applicable.

OK

▼ Must-Select & Must-Cover Engagements

Select the engagements your firm performed with periods ending during the year that require your firm to undergo a System Review, which may include multiple codes for a single engagement. [Learn more...](#)

Your firm is required to have a System Review if it performs engagements under the Statements on Auditing Standards (SASs), the Government Auditing Standards (Yellow Book), examinations under the Statements on Standards for Attestation Engagements (SSAEs), or engagements under the PCAOB standards, that are not subject to

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12. For System Reviews only, update the **Must-Select & Must-Cover Engagements** responses as necessary.

**Note:** If none are applicable to your firm, select **None of the Must-Select or Must-Cover Practice Areas/Industries Apply**.

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name:

☐ SEC [Learn more...](#)

☐ Other

**Must-Select & Must-Cover Engagements**

Select the engagements your firm performed with periods ending during the year that require your firm to undergo a System Review, which may include multiple codes for a single engagement. [Learn more...](#)

**Your firm is required to have a System Review if it performs engagements under the Statements on Auditing Standards (SASs), the Government Auditing Standards (Yellow Book), examinations under the Statements on Standards for Attestation Engagements (SSAEs), or engagements under the PCAOB standards, that are not subject to permanent inspection by the PCAOB.**

**Employee Retirement Income Security Act (ERISA)**

☐ 383 - Defined Contribution Plans—Full & Ltd Scope (403 (b) plans only)

☐ 380 - Defined Contribution Plans—Full & Ltd Scope (excluding 403(b) plans)

☐ 390 - Defined Benefit Plans—Full & Ltd Scope

☐ 400 - ERISA Health & Welfare Plans

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13. For System Reviews only, review the **Other Practice Areas & Industries** and select those applicable to the engagements that require your firm to have a System Review.

**Note:** If none are applicable to your firm, select **None of the other Practice Areas/Industries** apply.

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name

**Other Practice Areas & Industries**

Select the practice areas/industries your firm performed with periods ending during the year (or report dates during the year, for financial forecasts, projections and agreed upon procedures) that would require a System Review, which may include multiple codes for a single engagement. [Learn more...](#)

**Depository and Lending Institutions**

| Select                   | Code & Description                                 |
|--------------------------|--|
| <input type="checkbox"/> | 125 - Banks, Savings Institutions, & Credit Unions |
| <input type="checkbox"/> | 190 - Finance Companies                            |
| <input type="checkbox"/> | 250 - Mortgage Banking                             |

**Entities with Oil and Gas Producing Activities**

| Select                   | Code & Description                       |
|--------------------------|--|
| <input type="checkbox"/> | 180 - Extractive Industries--Oil and Gas |
| <input type="checkbox"/> | 185 - Extractive Industries--Mining      |

**Health Care Entities**

| Select                   | Code & Description                     |
|--------------------------|--|
| <input type="checkbox"/> | 210 - Health Maintenance Organizations |
| <input type="checkbox"/> | 216 - Hospitals                        |

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14. For System Reviews only, selections from the previous step are listed under **Concentrations of Other Practice Areas & Industries**.

**PRIMA**

Home PRI-589248

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name

**Other Practice Areas & Industries**

Select the practice areas/industries your firm performed with periods ending during the year (or report dates during the year, for financial forecasts, projections and agreed upon procedures) that would require a System Review, which may include multiple codes for a single engagement. [Learn more...](#)

**Depository and Lending Institutions**

| Select                   | Code & Description                                 |
|--------------------------|--|
| <input type="checkbox"/> | 125 - Banks, Savings Institutions, & Credit Unions |
| <input type="checkbox"/> | 190 - Finance Companies                            |
| <input type="checkbox"/> | 250 - Mortgage Banking                             |

**Entities with Oil and Gas Producing Activities**

| Select                   | Code & Description                       |
|--------------------------|--|
| <input type="checkbox"/> | 180 - Extractive Industries--Oil and Gas |
| <input type="checkbox"/> | 185 - Extractive Industries--Mining      |

**Health Care Entities**

| Select                   | Code & Description                     |
|--------------------------|--|
| <input type="checkbox"/> | 210 - Health Maintenance Organizations |
| <input type="checkbox"/> | 216 - Hospitals                        |

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15. Answer the following questions based upon your firm's system of **quality control** regarding if there have been any changes in leadership of the quality control system, when the most recent review/update occurred, and when the most communication to staff was performed.

**PRIMA**

Home PRI-589248

**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested | Firm Name

**Firm Quality Control**

Has there been any change(s) to the firm's Managing Partner, Quality Control Director (or equivalent), or other senior leadership role(s) that oversee audit and attest engagements?

☐ Yes ☐ No ☐ Not Applicable

The Statements on Quality Control Standards (SQCS) require that your firm review and or update and communicate changes to staff regarding your Quality Control Documentation (QCD). Please indicate the dates of the most recent update or review of your firm's QCD and communication to staff.

When was the most recent update or review:

Select a date:  (or) ☐ I don't remember ☐ My firm continuously reviews and updates its QCD (multiple times per year)

When was it most recently communicated to staff:

Select a date:  (or) ☐ I don't remember ☐ My firm continuously communicates QCD changes to staff (multiple times per year) ☐ N/A-Sole Practitioner

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16. Complete your **Firm Personnel** information.



**Peer Review Information (PRI-589248)**  
Status: Open-PRI-Requested

**Firm Personnel Information**

Enter the number of personnel that provide A&A services (including Owners and/or Sole Practitioners). [Learn more...](#)

| Partners (including Owners and/or Sole Practitioners) | Managers | Leased or Per Diem | Other professionals | Total Personnel in Firm |
|---|----------|--------------------|---------------------|-------------------------|
| 1   | 0        | 0                  | 0                   | 1                       |

*Hint: Minimum 1*

Total CPAs & PAs (Including Non-A&A Personnel)

1

*Hint: The total CPAs & PAs should be greater than or equal to the number of partners.*

**Acknowledgement**

**Scheduling Form**

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17. For new engagements, enter in the appropriate **Period End** and **Report** date.

**Note:** This step will not show if you did not select any new engagements that were selected in your **Industries & Practice Areas** section.

**Peer Review Information (PRI-589250)**  
Status: Open-PRI-Requested | Firm Name:

**Engagement Dates**

If your firm performs more than one engagement of each type, include the first engagement your firm performed of this type. [Learn more...](#)

| Code & Practice Area  | Response       | Initial Engagement Period End Date | Initial Engagement Report Date |
|---|----------------|------------------------------------|--------------------------------|
| 9 - Audits Under Statements on Auditing Standards (SASs)                                | Performed      |                                    |                                |
| <b>Government Auditing Standards (GAS)</b>  |                |                                    |                                |
| 25 - Financial Audits (GAS)   | Do not Perform |                                    |                                |
| 26 - Attestation Engagements (Examination, Review, or Agreed-upon Procedures under GAS) | Do not Perform |                                    |                                |
| 27 - Performance Audits (GAS)   | Do not Perform |                                    |                                |
| <b>International Standards</b>  |                |                                    |                                |

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18. To print the summary before submitting, click **Print**

Home UPD-53136

**Update Enrollment (UPD-53136)**  
Status: Pending-Approve Revision | Firm Name:

This also applies whether the year-end (or report date, for financial forecasts, projections, or agreed upon procedures) falls within the peer review year or the period subsequent.

I understand that failure to properly represent my firm's practice, may result in my firm's enrollment being dropped or terminated and, if dropped or terminated, will result in referral of the matter for investigation of a possible violation to the appropriate regulatory, monitoring, and enforcement bodies.

I understand and accept

The AICPA has created an Assurance Research Advisory Group (ARAG), which seeks to drive research relative to assurance issues that are most pressing to the profession by requesting and funding research proposals from academia. In addition to providing funding, the AICPA facilitates the voluntary disclosure of anonymized peer review data to research teams who submit an approved proposal. The goal of this voluntary process is to encourage research into the correlations between firm policies/characteristics and performance (as measured by peer review results), thereby identifying factors which influence audit quality in support of the Enhancing Audit Quality initiative. Data will be anonymized before it is provided to researchers such that there will be no indication of a firm's name, employer identification number, location or the name of its personnel. All members of the research teams will be required to sign a confidentiality agreement before receiving the data. The types of data which will be shared with researchers are described [here](#).

Please note that by submitting your Peer Review Information Form, you voluntarily agree that your firm's anonymized peer review data will be shared with approved research teams UNLESS YOU OPT OUT.

For further information and other questions and answers, [click here](#).

Opt-in Opt-out

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19. Select **Acknowledgements**. The box refers to participation in a voluntary, anonymous research program. Selection is an OPT OUT and is optional.

Home PRI-589254

**Peer Review Information (PRI-589254)**  
Status: Open-PRI-Requested | Firm Name:

I understand that failure to properly represent my firm's practice, may result in my firm's enrollment being dropped or terminated and, if dropped or terminated, will result in referral of the matter for investigation of a possible violation to the appropriate regulatory, monitoring, and enforcement bodies.

I understand and accept

The AICPA has created an Assurance Research Advisory Group (ARAG), which seeks to drive research relative to assurance issues that are most pressing to the profession by requesting and funding research proposals from academia. In addition to providing funding, the AICPA facilitates the voluntary disclosure of anonymized peer review data to research teams who submit an approved proposal. The goal of this voluntary process is to encourage research into the correlations between firm policies/characteristics and performance (as measured by peer review results), thereby identifying factors which influence audit quality in support of the Enhancing Audit Quality initiative. Data will be anonymized before it is provided to researchers such that there will be no indication of a firm's name, employer identification number, location or the name of its personnel. All members of the research teams will be required to sign a confidentiality agreement before receiving the data. The types of data which will be shared with researchers are described [here](#).

Please note that by submitting your Peer Review Information Form, you voluntarily agree that your firm's anonymized peer review data will be shared with approved research teams UNLESS YOU OPT OUT.

For further information and other questions and answers, [click here](#).

Opt-in Opt-out

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20. To submit the form and open the scheduling case so that you can select a reviewer, click **Complete Now** to continue with completing the Scheduling Form. To submit the PRI and complete the Scheduling Form later, click **Complete Later** and click **Submit** to complete the PRI. A scheduling case will be added to the **Action Items** list on the **Home** tab.

Peer Review Information (PRI-589250)  
Status: Pending-PRI-Revisions Requested | Actions

| Code & Practice Area                           | Response          |
|--|-------------------|
| 61 - Examination Engagements (SSAE)            | Performed         |
| 62 - Review Engagements (SSAE)                 | Expect to Perform |
| 63 - Agreed-upon Procedures Engagements (SSAE) | Do not Perform    |

PCAOB Reports  
Independence Standards  
Firm Quality Control  
Firm Personnel Information  
Acknowledgement  
Scheduling Form

When do you want to complete the scheduling form?  
Complete Now Complete Later  
Required Field

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21. 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 response and click **Submit Feedback**.

If you do not want to provide feedback, you can 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".

Feedback (Optional)

Please help us evaluate our services by completing this short survey. We would love to hear your thoughts, concerns or problems with anything so we can improve and serve you better.

Survey Feedback

What is your main role when using PRIMA?\*

☐ Administrator  
☐ Administering Entity CPA on Staff  
☐ Board of Accountancy User  
☐ Firm Managing Partner/Peer Review Contact  
☐ Reviewer  
☐ Technical Reviewer

Is this your first time using PRIMA?\*

☐ Yes  
☐ No

Overall, how satisfied are you with your PRIMA experience?\*

☐ Very Satisfied  
☐ Satisfied  
☐ Neutral  
☐ Dissatisfied  
☐ Very Dissatisfied

Please provide comments on how we can improve your experience.

Clear Feedback Submit Feedback

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For instructions on completing the scheduling form, see [Entering Review Scheduling Information in PRIMA \(Firm\)](#).

**Related Article:**

[Industry Codes and Practice Areas in PRIMA](#)

