

Home > Entering Engagement Summary on Engagement Reviews (Firms)

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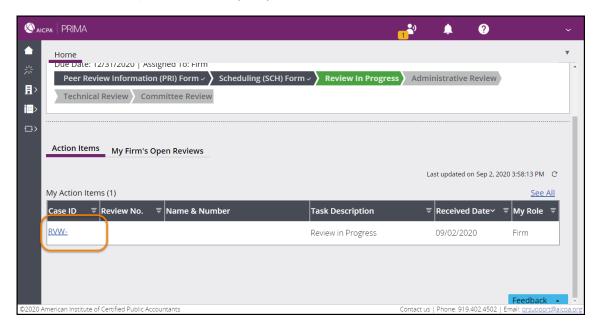
Average 3.0

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.

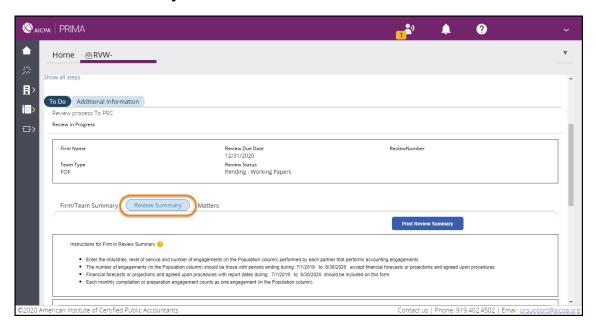
For video instructions, see Entering Engagement Summary on Engagement Reviews (Firm) - Video.

To enter engagement summary statistics and details, perform the following steps:

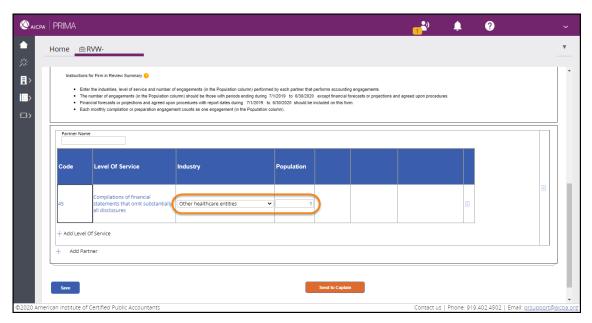
1. Under **Action Items**, click the review (RVW) **Case ID**.



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



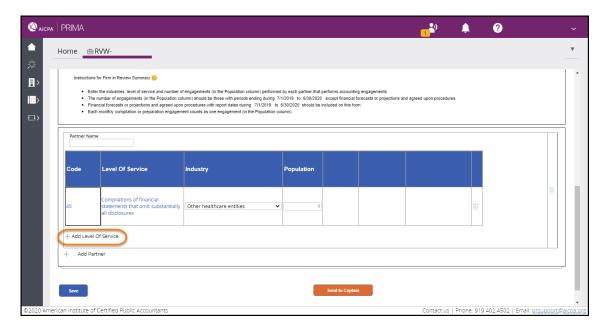
3. For each engagement, select **Industry** and enter **Population** hours.



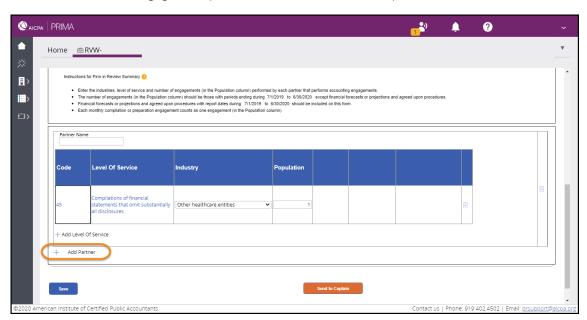
4. To add an additional level of service to an engagement, click the **Add Level Of Service** plus (+) icon.

Note: Only services specified on the PRI will be available for selection.

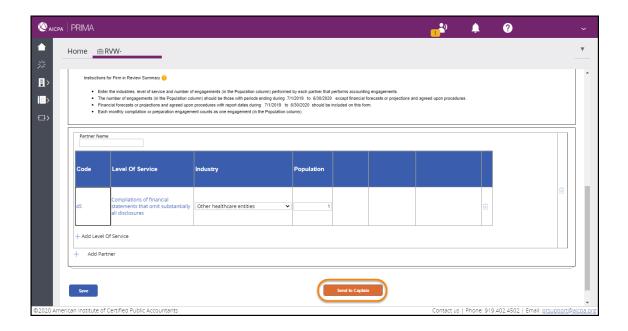
Note: Adding a level of service that is blank will result in an error. If added by mistake, delete the empty level of service.



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



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



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