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## Entering Engagement Summary on Engagement Reviews (Firms)

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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**.

The screenshot displays the AICPA PRIMA system interface. The top navigation bar is purple with the AICPA logo and 'PRIMA' text. The sidebar on the left contains icons for Home, Search, and other functions. The main content area shows the 'Action Items' section under 'My Firm's Open Reviews'. A table lists action items, with the 'Case ID' column highlighted by an orange box. The table has columns for Case ID, Review No., Name & Number, Task Description, Received Date, and My Role. The first row shows a link to 'RVW-' in the Case ID column, 'Review in Progress' in the Task Description column, and '09/02/2020' in the Received Date column. The footer contains copyright information and contact details.

Case ID	Review No.	Name & Number	Task Description	Received Date	My Role
<a href="#">RVW-</a>			Review in Progress	09/02/2020	Firm

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

The screenshot shows the AICPA PRIMA interface. The top navigation bar includes the AICPA logo, the word 'PRIMA', and icons for notifications, help, and a dropdown menu. The main content area is titled 'Home' and 'RVW-'. It features a 'Show all steps' link and two tabs: 'To Do' and 'Additional Information'. The 'To Do' tab is active, showing 'Review process To PRC' and 'Review in Progress'. Below this, there is a form with fields for 'Firm Name', 'Team Type' (FOF), 'Review Due Date' (12/31/2020), and 'Review Status' (Pending - Working Papers). A 'Review Summary' tab is highlighted with an orange circle. To the right of this tab is a 'Print Review Summary' button. Below the tabs, there is a section titled 'Firm/Team Summary' and 'Matters'. A 'Print Review Summary' button is also present. At the bottom, there is a section titled 'Instructions for Firm in Review Summary' with a list of instructions.

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

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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.

**AICPA PRIMA**

Home **RVW-**

Instructions for Firm in Review Summary

- Enter the industries, level of service and number of engagements (in the Population column) performed by each partner that performs accounting engagements.
- The number of engagements (in the Population column) should be those with periods ending during 7/1/2019 to 6/30/2020 except financial forecasts or projections and agreed upon procedures.
- Financial forecasts or projections and agreed upon procedures with report dates during 7/1/2019 to 6/30/2020 should be included on this form.
- Each monthly compilation or preparation engagement counts as one engagement (in the Population column).

Partner Name

Code	Level Of Service	Industry	Population				
45	Compilations of financial statements that omit substantially all disclosures	Other healthcare entities	1				

+ Add Level Of Service

+ Add Partner

Save Send to Captain

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

**AICPA PRIMA**

Home **RVW-**

Instructions for Firm in Review Summary

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+ Add Level Of Service

+ Add Partner

Save Send to Captain

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

PRIMA

Home
RVW

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## Related Articles:

[Submitting Working Papers in PRIMA](#)

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