



🔍 approving team members

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Approving Reviewer Schedule after Adding Team Members (Firm)

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Once the reviewer / team captain has assigned a schedule and selected a team, scheduling checks are initiated to verify qualifications based on engagements. If there are any conflicts or additional team members have been added, the scheduling case is returned to the firm for corrections and final approval.

For video instructions, see [Approving Reviewer Schedule after Adding Team \(Firm\) - 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.

To approve reviewer scheduling and independence, perform the following steps:

1. Under **Action Items**, click the scheduling (SCH) **Case ID**.

The screenshot shows the AICPA PRIMA interface. At the top, there is a purple header with the AICPA logo and 'PRIMA' text. On the right side of the header, there are three notification icons: a person icon with a '1' badge, a bell icon with a '3' badge, and a question mark icon. Below the header is a navigation bar with a home icon and a dropdown arrow. The main content area is divided into two sections. The first section, titled 'Home', shows a progress bar for a review process. The progress bar consists of several steps: 'Peer Review Information (PRI) Form', 'Scheduling (SCH) Form' (highlighted in green), 'Review In Progress', 'Administrative Review', 'Technical Review', and 'Committee Review'. Below the progress bar, there is a section titled 'Action Items' with a sub-section 'My Firm's Open Reviews'. This section includes a timestamp 'Last updated on Sep 2, 2020 1:28:18 PM' and a 'See All' link. Below this is a table with the following columns: 'Case ID', 'Review No.', 'Name & Number', 'Task Description', 'Received Date', and 'My Role'. The table contains one row with the following data: 'SCH-' (highlighted with an orange circle), an empty cell, an empty cell, an empty cell, '09/02/2020', and 'Firm'. At the bottom of the page, there is a footer with the text '©2020 American Institute of Certified Public Accountants' on the left and 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org' on the right. A 'Feedback' button is also visible in the bottom right corner.

2. Review **Independence Attestation** and **Review Team Members**.

The screenshot shows the AICPA PRIMA interface. At the top, there's a navigation bar with 'Home' and 'SCH' tabs. Below that, the 'Scheduling (SCH)' section is visible, with a status of 'Pending-Submit to AE' and a field for 'Firm Name'. An 'Actions' dropdown menu is on the right. The main content area is titled 'Independence Attestation' and contains a note: 'Note: By accepting the review team, you are attesting to your firm's independence.' Below the note is a table for 'Review Team Members' with columns: Member Number, Member Name, Member Type, Email, Firm Number, and Firm Name. The table is currently empty. Below the table, there's a paragraph: 'The reviewed firm and reviewing firm are responsible for determining independence and should consult the [Peer Review Standards](#) for detailed guidance.' This is followed by a question: 'Do you **AGREE** to have your review performed by the review team?'. Below the question are two buttons: 'I Agree' and 'I Decline'. At the bottom of the page, there are 'Help', 'Save Changes', and 'Submit' buttons. The footer contains the URL 'www.aicpa.org/Research/Standards/PeerReview/Pages/default.aspx' and contact information: 'Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org'.

3. Select **I Agree** to the question **Do you agree to have your review performed by the review team?**

The screenshot displays the AICPA PRIMA Scheduling (SCH) interface. The page title is "Scheduling (SCH)" with a status of "Pending-Submit to AE" and a "Firm Name:" field. An "Actions" dropdown menu is visible in the top right. The main section is titled "Independence Attestation" and contains a note: "Note: By accepting the review team, you are attesting to your firm's independence." Below this is a "Review Team Members" table with columns for Member Number, Member Name, Member Type, Email, Firm Number, and Firm Name. The table is currently empty. A paragraph of text states: "The reviewed firm and reviewing firm are responsible for determining independence and should consult the [Peer Review Standards](#) for detailed guidance." Below this is a question: "Do you **AGREE** to have your review performed by the review team?" followed by a detailed acknowledgment statement. Two buttons, "I Agree" and "I Decline", are highlighted with an orange border. At the bottom of the page, there are "Help", "Save Changes", and "Submit" buttons. The footer contains the URL "www.aicpa.org/Research/Standards/PeerReview/Pages/default.aspx" and contact information: "Contact us | Phone: 919.402.4502 | Email: prsupport@aicpa.org".

Home SCH

Scheduling (SCH)
Status: Pending-Submit to AE Firm Name: Actions

Independence Attestation

Note: By accepting the review team, you are attesting to your firm's independence.

Review Team Members

Member Number	Member Name	Member Type	Email	Firm Number	Firm Name
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The reviewed firm and reviewing firm are responsible for determining independence and should consult the [Peer Review Standards](#) for detailed guidance.

Do you **AGREE** to have your review performed by the review team?
By doing so, you acknowledge there are no relationships or transactions between the reviewed firm, the reviewing firm and the review team members (including team/review captain) (parties) that may give rise to a conflict of interest or the appearance of independence being impaired.

I Agree I Decline

Help Save Changes Submit

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4. Under **Acknowledgements**, click **I Understand and Accept**.

The screenshot shows a web application interface for 'Scheduling (SCH-)'. The status is 'Pending-Submit to AE' and there is a 'Firm Name' field. The form is divided into sections: 'Independence Attestation' and 'Resignations'. Under 'Independence Attestation', there is a sub-section 'Accuracy of Information Provided' with a paragraph of text and a bulleted list. Below this is a button labeled 'I Understand and Accept'. Under 'Resignations', there is a paragraph of text and another button labeled 'I Understand and Accept'. At the bottom of the form are buttons for 'Help', 'Save Changes', and 'Submit'. The footer contains copyright information for the American Institute of Certified Public Accountants and contact details.

5. Click **Submit**.

AICPA PRIMA

Home SCH-

Scheduling (SCH-)
Status: Pending-Submit to AE Firm Name: Actions

no longer expects to perform an engagement that was the only engagement in that practice area or industry, that is within the peer review's scope.

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 to it. I understand that failure to properly represent my firm's practice, including relationships or transactions with reviewing firms and team/review captains and team members (and their firms) that may give rise to a conflict of interest or the appearance of independence being impaired, 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

Resignations

My firm agrees to be bound by the Peer Review Standards, including those that may restrict our right to resign from the program once a peer review has commenced. **In particular, we understand that resignations during the course of a peer review will not be allowed except as set forth in *Peer Review Standards*. We also understand that if all the partners of the firm who are members of the AICPA resign while a peer review is in process, the firm will not be un-enrolled from the program until the review is completed.**

I Understand and Accept

Help Save Changes Submit

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Scheduling checks will be initiated and could take up to 5 minutes to process. If there are any scheduling errors, the peer review contact will receive an email. For more information on resolving scheduling errors, see [Resolving Scheduling Errors in PRIMA \(Firm\)](#) and [Resolving Scheduling Errors \(Firm\) - Video](#). If there are no scheduling check errors, the form will be submitted to the Administering Entity for approval. The firm and reviewer will receive an email when the scheduling is approved.

After AE approval and the reviewer begins the review, the reviewer will create any potential MFCs and FFCs and upload working papers. Any required follow-up for the firm will generate an assignment under **Action Items**.

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