Getting Started in PRIMA

Contents

Introduction

The Peer Review Integrated Management Application (PRIMA) is the primary tool used by firms, reviewers, and the entities administering peer review to complete the peer review process. PRIMA is accessible to all AICPA customers whose records are linked to a public accounting firm in our records.

If your firm has undergone a peer review before with the same administering entity (AE) (typically a state society), your firm is probably set up in PRIMA already.

Note: AICPA Members and AICPA-CIMA.com customers will use their existing username and password to access PRIMA. If you received a PRIMA notification to log in, there is nothing else you need to do to get access. If you need to recover your password, please follow the instructions below.

Accessing PRIMA

1. Go to prima.aicpa.org. If you are not logged in to AICPA-CIMA.com, you will be prompted to log in with your AICPA-CIMA.com credentials.
2. If you do not already have an online account, you will choose "Register using your AICPA member number" if you are an AICPA Member or customer number if you are a previous customer (e.g., if you've registered for a conference or have purchased materials, including CPE, from the AICPA) to set up a new account.
   - If your firm has undergone a peer review with the same administering entity, you probably have a user account in PRIMA.

Resetting Your AICPA-CIMA.com Password

To retrieve your password on the AICPA website:

1. Go to aicpa-cima.com/login
2. Click Forgotten Password on the sign-in screen
3. Enter the email address associated with your AICPA account
4. Click the Send reset password email button

Your reset password will be emailed to you.

To change your password on the AICPA website, please sign in to your account following the steps below:

1. Sign in to aicpa-cima.com/login
2. Click on My Account at the top of the page
3. Click on Change Password under Settings

If you need additional assistance, please contact the Global Engagement Center at service@aicpa-cima.com or 888.777.7077 M–F 9am–6pm ET.

Updating Your Account Profile

Associating Yourself with a Public Accounting Firm

You will not be able to access PRIMA if you are not associated with a public accounting firm in our records.

To add a relationship to a public accounting firm online:

1. Sign in to aicpa-cima.com/login
2. Click on the down arrow next to your name
3. Click on **Profile**
4. Click on **My employment details**
5. Click on **Add an Employer**
6. Enter **Your role** (You will not be able to enroll your firm in peer review if you are not identified as **Partner/Owner** of your firm)
7. Enter your Business name and click on the magnifying glass icon to search.

. If any businesses match your search:

1. Select the one that matches your location based on the city shown in parentheses

2. Verify the Organization Type is **Public Accounting**
3. If Organization Type is not **Public Accounting,** you can retry using **Search again** to select another Organization record. If the Organization record you selected is the correct record, but has an incorrect organization type (business and industry, consulting firm, etc.), please call 919.402.4502 to speak with a Peer Review Specialist regarding updating your Organization Type to **Public Accounting**
4. Enter the **Business City** of the location you are trying to add and click on the magnifying glass icon to search
5. Select the city from the list
6. Verify the **Business Address** and **Work Phone Number** shown are correct for the location you wish to add
7. Click on **Save**

If no business matches your search, do not click on **+ Create New**. You will not be able to create a new public accounting firm online. Please see the form, Creating a Public Accounting Firm.

Updating Your Position

You will not be able to enroll your firm in peer review if there is not at least one customer record associated with your firm that is identified as a Partner/Owner of your firm.

To update your position online:

1. Sign in to aicpa-cima.com/login
2. Click on the down arrow next to your name
3. Click on **Profile**
4. Click on **My employment details**
5. Click on **Edit** for the employer you wish to update (Note you will be unable to edit if your position is already set to a partner level role)
6. Select the appropriate role from the drop-down
7. Click on **Save**

Communications from PRIMA

Please add prima@aicpa.org to your contact list or safe sender list to ensure you receive peer review related communications.

Email notifications will look like the sample below and will appear in your inbox as "Peer Review Program."

You are receiving this email because you have an important new notification in the Peer Review Integrated Management Application (PRIMA) regarding your firm's peer review.

Click here or visit prima.aicpa.org to sign in and view your notifications on your dashboard. Click on the case number, provided below, to open the full message.

To access PRIMA, log in using your AICPA.org or aicpastore.com username and password.

The AICPA's first priority during the COVID-10 pandemic is your health, safety and well-being. As such, we are operating with an abundance of caution and want to make sure you are aware of options for reviews during these uncertain times.

PRIMA Home Page

Your PRIMA home page includes:

Announcements

The Announcements section is at the top of the page and will include important information from the AICPA such as PRIMA changes, upcoming training dates, prima maintenance schedule and more.

Action Items

Actions requiring your entry or response, including your peer review information (PRI), scheduling, corrective action, implementation plan and review cases. For reviewers, this will also display review-related cases that require your entry or response.

Please note: This link will not appear if no action is required on your part.

Letters and Important Information

Letters or important peer review communications sent to you and/or your firm.

PRIMA Help

The AICPA Peer Review Program provides a PRIMA Help website for users that can be accessed from the Help link in PRIMA. The website contains many helpful articles with screenshots and short training videos that are designed to assist users with navigating PRIMA.

There are two articles titled "Instructions for Peer Reviewers Using PRIMA" and "Instructions for Firms Using PRIMA" that walk users through the peer review process, linking to other articles with screenshots, instructions and short training videos. These articles are the first two links within the PRIMA Help website.

Help

For Firms

For Reviewers

To access PRIMA Help:

1. Sign in to PRIMA at prima.aicpa.org.
2. Click the white question mark button next to your name in the upper right corner.

Managing Partner and Peer Review Contacts

One or two individuals are associated with a firm in PRIMA, the Managing Partner and Peer Review Contact. These individuals need to be partners at the firm as they make acknowledgements on behalf of the firm. The Managing Partner and Peer Review Contact receive email notifications and letters via PRIMA and perform actions on behalf of the firm. If you need to change your position at your firm, refer to Updating Your Position above.

The Managing Partner can change the Managing Partner or the Peer Review Contact by going to For Firms and updating enrollment. Once an update is initiated, it will appear under Action Items until it is submitted. Only one case may be open at a time.

The Peer Review Contact can change these individuals when completing the Peer Review Information (PRI) Request prior to the scheduling of the peer review.

Please note: Users can not currently update the Managing Partner or Peer Review Contact once your Peer Review Information form (PRI case) has been submitted. If you need to change Managing Partner or Peer Review Contact but are unable to make this change in PRIMA, please email prsupport@aicpa.org and provide the name, email address and AICPA member/customer number (if available).

Enrollment in AICPA Peer Review Program

Three types of firms have their peer reviews administered within PRIMA:

- Firms with AICPA members enrolled in the AICPA Peer Review Program
- Firms with no AICPA members enrolled in the AICPA Peer Review Program
- Firms with no AICPA members enrolled in a state CPA society peer review program

The functionality for all three types of firms is the same within PRIMA. Firms with no AICPA members may enroll in the AICPA Peer Review Program within PRIMA by clicking For Firms and then selecting "Change Peer Review Program."

March 2024
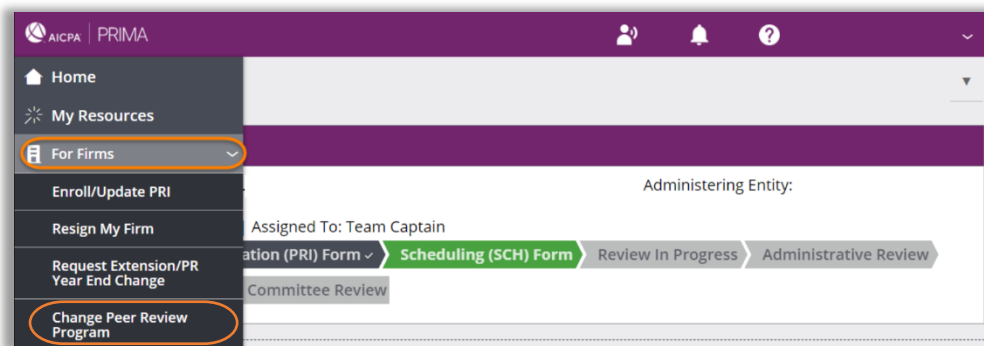
Who do I contact for help?

The AICPA Peer Review Program provides PRIMA support. Contact us at 919.402.4502 or prsupport@aicpa.org. For assistance with your AICPA-CIMA.com account, contact the Global Engagement Center at service@aicpa-cima.com or 888.777.7077. Staff are available from 9am – 6pm ET.

Login error messages

Some users experience an issue and receive the following message when attempting to log in to PRIMA:

> "Unable to process the SAML WebSSO request: User does not exist in PRIMA. Please contact system administrator."

Unfortunately, Peer Review staff cannot resolve this issue by phone as this requires a fix by our IT support team. **When logging in, if you experience this error or any other issue**, email prsupport@aicpa.org and provide your name, username (i.e., primary email address) and a screenshot of the issue, if available. This will open a support case that Peer Review staff can submit to our IT support team to address this issue.

Browser Compatibility

PRIMA supports Apple's Safari, Google's Chrome, Microsoft's Edge and Mozilla's Firefox web browsers.

PRIMA Frequently Asked Questions

PRIMA FAQs for Enrolled Firms and Peer Reviewers