

**2015 AICPA Peer Review Program Conference  
August 2-4, 2015 • New Orleans, LA**

**ADMINSTRATORS' SESSION AGENDA**

**Sunday, August 2, 2015**

**OPTIONAL SESSIONS**

8:00am – 5:30pm      **Registration Desk & Message Center Open**

5:00pm – 6:00pm      **Networking Reception**

**Monday, August 3, 2015**

7:00am – 5:30pm      **Registration Desk and Message Center Open**

7:00am – 8:00am      **Continental Breakfast**

8:00am – 8:15am      **Welcome Remarks (Both General and Administrators)**  
Ron Gitz, Executive Director of the Society of Louisiana CPAs, will welcome attendees to New Orleans.

8:15am – 9:45am      **01 AICPA Update (Both General and Administrators)**  
**KEYNOTE SPEAKERS**  
Immediate Past Chairman, Bill Balhoff, and Sue Coffey, SVP Public Practice and Global Alliances, will present on high level developments in the accounting world.

9:45am – 9:55am      **Beverage Break**

9:55am – 10:55am      **02 Impact of Developments in the Profession on Peer Review (Both General and Administrators)**  
Jim Brackens, VP Ethics and Practice Quality, and Anita Ford, Peer Review Board Chair, will present the Peer Review implications of the items identified by the Keynote Speakers as well as other initiatives.

10:55am – 11:05am      **Administrators leave General Session** and move to Administrator Session primary room

11:05am – 11:15am      **03A Welcome and Introductions with Beth Thoresen, AICPA Director – Peer Review Operations**  
'Good Morning and Welcome' to the Administrators' Sessions in New Orleans! Our newest administrators will be introduced to the AE Community, courtesy rules will be covered.

11:15am – 12:00pm      **04A Improving Annual POA Submissions with Karl Ruben, AICPA Technical Manager – Peer Review**  
Participants will receive an overview of the outcome of 2015 submissions, discuss ways to improve submission process for 2016, and have an open exchange with the presenter. Group discussion can be expanded upon during the Exchange of Ideas Session to provide AICPA with additional ideas.

12:00pm – 1:00pm      **Lunch**

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**Monday, August 3, 2015, continued**

- 1:00pm – 2:45pm      **05A Exchange of Ideas, Breakout Sessions with Members of AATF**  
Participants will break out into smaller discussion groups with list of topics/conference cases as requested via survey of administrator community. Each session will be led by a member of AATF. Participants will be divided into groups by assigned AATF representative. Participants will be selected to lead each topic discussion during Recap Session to ensure group involvement.
- NOTE: The list of discussion topics will be made available on SharePoint one week prior to the conference. Attendees should review these topics in advance and be prepared to discuss in group setting.
- 2:45pm – 2:55pm      **Beverage Break**
- 2:55pm – 3:55pm      **06A Case Studies with Members of AATF**  
Breakout groups will return to small group settings and be assigned 2-3 case studies to work through & discuss conclusions.
- 4:05pm – 5:00pm      **07A Systems Update: PRISM, Administrative Website and netFORUM with Donna Roethel, AICPA Senior Manager – Peer Review Technology Initiatives, Ciara Locklear, AICPA Business Analyst – Peer Review, and Maria Navarro, AICPA Associate Business Analyst – Peer Review**  
Participants will be advised of the status of netFORUM and a recap of resulting PRISM changes. Other topics to be discussed include PRISM reassessment and revisions since last conference, changes to and merger of the Public File and Firm Searches, Administrative Website redesign, and two peer reviews available in FSBA. *Winner of “Name PRISM 2 Contest” announced.*
- 5:00pm - 6:00pm      ***Cocktail Reception***  
**Sponsored by PCPS (all attendees are invited)**

**Tuesday, August 4, 2015**

- 7:00am – 4:00pm      **Message Center Open**
- 7:00am – 8:00am      **Continental Breakfast**
- 7:00am – 8:00am      **Administrators' Breakfast** (Join us for a PRP101 contest - with prize drawing later in the day)
- 8:00am – 9:45am      **08A Understanding Revised Reviewer Performance with LaVonne Montague AICPA Technical Manager – Peer Review, Carl Mayes, AICPA Senior Technical Manager – Special Projects, and Chris Ellis, AICPA Manager – Peer Review Operations**  
This presentation will provide insight into the revised reviewer performance guidance. Participants will learn more about identifying reviewer performance deficiencies and ways this can be addressed and corrected. A demonstration of the Reviewer Feedback Database on SharePoint will be provided; entry of new reviewer feedback forms and deficiency letters followed by a 20-30 minute Q&A session on these topics.
- 9:45am – 10:00am      **Beverage Break**

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**Tuesday, August 4, 2015, continued**

- 10:00am – 11:00am     **09A Revised Reviewer Training and Referral Database Update with Tim Kindem, AICPA Technical Manager – Peer Review**  
Our presenter will cover the revised reviewer training requirements that were approved at the May PRB meeting as well as the courses reviewers can take to meet those requirements. PRISM screen 'mock-ups' will be also covered. Finally, an overview of the recent modifications to the Referral Database will be provided to facilitate a better understanding for users.
- 11:00am – 12:00pm     **10A Exchange of Ideas Session Recap with Members of AATF**  
Participants from breakout sessions will reconvene together and are encouraged to openly discuss and share their ideas related to the topics and case studies from former sessions.  
*iPad mini give away – random drawing based on list of registrants. Must be present to win.*
- 12:00pm – 1:00pm     **Lunch**
- 1:00pm – 2:00pm     **11A Insight into Oversight with Karl Ruben, AICPA Technical Manager – Peer Review, and Richard Hill, Oversight Task Force Chair**  
Our presenters will review the findings associated with the Enhanced Oversight process. Participants will also learn more about the results of the RAB Oversight, and information will be shared with the group regarding proper utilization of the National RAB Listing. A recap of last year's Oversight findings will also be included.
- 2:00pm – 2:30pm     **12A Update on Enhancing Audit Quality (EAQ) Initiatives with Fran McClintock, AICPA Associate Director – Peer Review**  
Participants will learn about the progress of this initiative and its future impact to administrators.
- 2:30pm – 2:45pm     **Beverage Break**
- 2:45pm – 3:45pm     **13A Open Q&A with AICPA Staff and Members of AATF**  
Continuation of any open Exchange Session discussions; Recap of conference highlights; Review questions submitted via comment cards. Rachelle Drummond, AICPA Technical Manager – Peer Review, will also be present to ensure adequate coverage of questions.  
*2 prize giveaways! PRP101 contest and second iPad mini (random drawing from list of registrants). Must be present to win.*
- 3:45pm                 **Administrators' Session Adjourns**