

# Getting Started in PRIMA

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## 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 and CPA.com customers whose records are linked to a public accounting firm in our records.

**Note:** AICPA Members and AICPA.org or aicpastore.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 our password, please follow the instructions below.

- **If you were sent a username**, please access using that username. If you do not know your password to that account, please see Resetting Your AICPA.org/CPA.com Password below.

- **If you were sent an AICPA customer number**, please register using PRIMA Home Page
- Below the Home page image, you will find links to:

### My Work

Actions requiring your entry or response, including your peer review information (PRI), scheduling, corrective action, implementation plan, and review cases.

### My Notifications

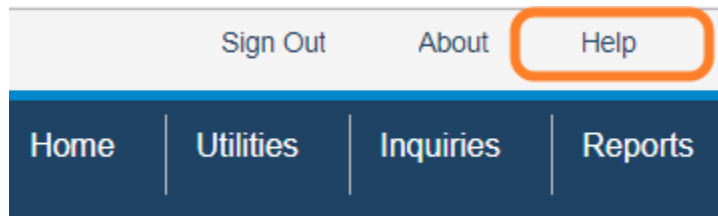
Letters or important peer review communications sent to your firm.

### My Teams Reviews (Reviewers Only)

Reviewers will have an additional link to My Teams Reviews. This link will display review-related cases that require your entry or response. **Please note:** This link will not appear if there are no action is required on your part.

## Peer Review Knowledge Base

The AICPA Peer Review Program has developed a knowledge base for peer review users. The Knowledge Base contains many helpful articles to assist you in PRIMA. There are two articles titled “Instructions for Peer Reviewers Using PRIMA” and “Instructions for Firms Using PRIMA” that walk each user through the peer review process, linking to articles with screenshots and instructions. These two articles are in the top left box titled General Information. You can also search for them by typing “instructions” with quotation marks in the search field in the top left of your screen and then pressing Enter on your keyboard. Scroll through the results until you find instructions for firms and reviewers. We will be continuously adding articles to address frequently asked questions and updating articles for any programming changes.



To access the Knowledge Base:

1. Sign in to PRIMA at [prima.aicpa.org](http://prima.aicpa.org).
2. Click on **Help** in the upper right-hand corner.

## Managing Partner and Peer Review Contact Updates

The Managing Partner can change the Managing Partner or the Peer Review Contact through going to Manage My Firm(s) and then updating enrollment. Once an update is initiated, it will appear under My Work, 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 cannot currently update Managing Partner or Peer Review Contact once your peer review case has been opened. 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](mailto:prsupport@aicpa.org) and provide the name, email address, and AICPA member/customer number (if available).

- Creating an AICPA.org/CPA.com account and be sure to use that customer number as mentioned in step 3 of those instructions.

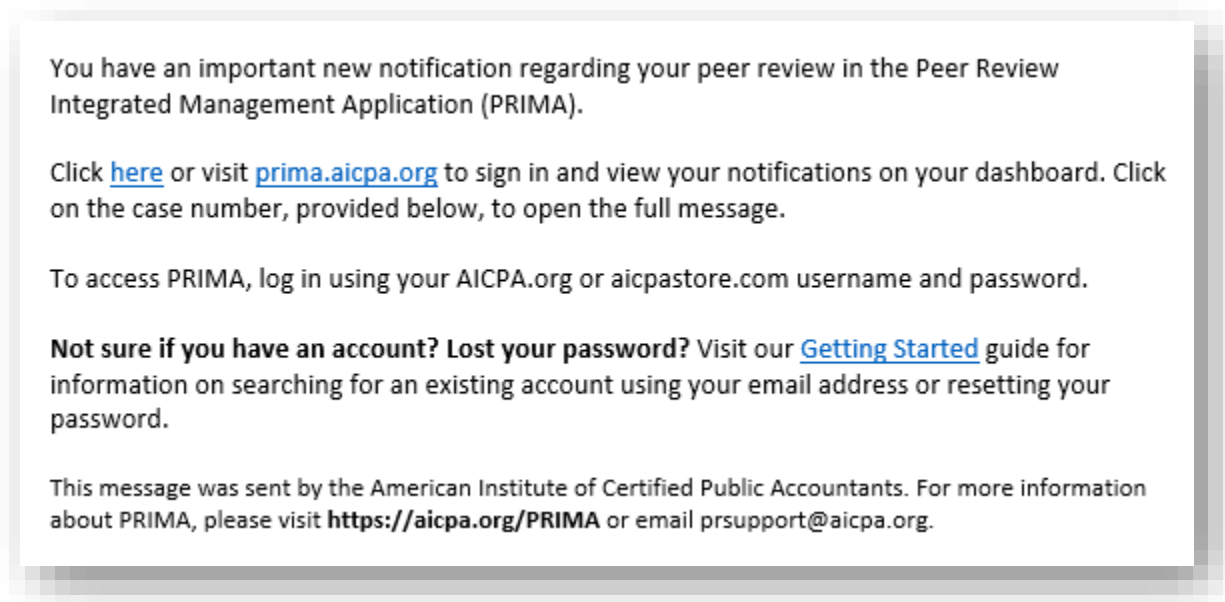
## Accessing PRIMA

1. If you don't have an AICPA.org/CPA.com account, [register a user account](#).
2. Go to [prima.aicpa.org](http://prima.aicpa.org). If you are not logged into AICPA.org or CPA.com, you will be prompted to log in with your AICPA.org/CPA.com credentials.

## Communications from PRIMA

Please add [prima@aicpa.org](mailto: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.



## PRIMA Home Page

Below the Home page image, you will find links to:

### My Work

Actions requiring your entry or response, including your peer review information (PRI), scheduling, corrective action, implementation plan, and review cases.

### My Notifications

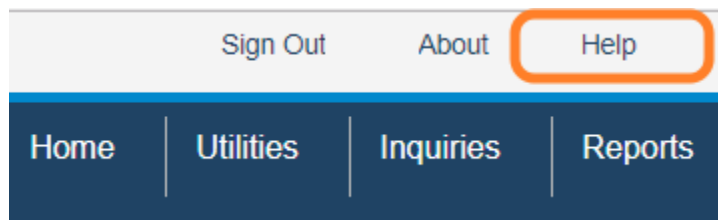
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## Creating an AICPA.org/CPA.com account

To register, please complete the following steps:

1. Click Sign In on [www.aicpa.org](http://www.aicpa.org) or [www.aicpastore.com](http://www.aicpastore.com) .
2. Select the Register link on [www.aicpa.org](http://www.aicpa.org) or the Create Account link for [www.aicpastore.com](http://www.aicpastore.com) and enter your email address.

3. 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 setup a new account.
4. If you already have an online account registered to that email address, you will have an opportunity to request a password reset to have a temporary password emailed to that address.

## Resetting Your AICPA.org/CPA.com Password

To retrieve your password on the AICPA website:

1. Go to <https://login.aicpa.org/>
2. Click Forgot Password on the sign-in screen.
3. Enter the email address associated with your AICPA account.
4. Click the Submit 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. Go to <https://www.aicpa.org/>
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 Member Service at [service@aicpa.org](mailto:service@aicpa.org) or 888.777.7077 M–F 9am–6 pm 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.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Add Employer**.
5. Enter your employer name. (You may also enter city, state, and postal code information to narrow your search).
6. Click on **Search**.

If an organization matches your search:

1. Select the radio button next to the best match.
2. Click on **Choose this organization**.
3. Select your position from the drop-down.
4. Select Public Accounting from the drop-down.

5. Select your email address from the drop-down or click on **Add** to the right of the Email drop-down.
6. If you are adding an email address, enter the address and click on **Save**.
7. Select your phone number from the drop-down or click on **Add** to the right of the Phone drop-down.
8. If you are adding a phone number, enter the phone number and click on **Save**.
9. Click on **Add Position**.

**If no organization matches your search**, do not click on None of These Match My Organization. You will not be able to create a new public accounting firm online. Please see **Error! Reference source not found.**

### 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.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Edit**.
5. Select the appropriate position from the drop-down.
6. Click on **Save**.

### Business Category

You will not be able to access PRIMA or enroll your firm in peer review if it is not correctly identified as a public accounting firm in our records. If your existing firm record has an incorrect business category (e.g., business and industry, consulting firm, etc.), please call 888.777.7077 to speak to a member of our Member Services team to request your firm record be updated to public accounting.

To view the business category of your organization:

1. [Sign in](#) to AICPA.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Edit**.

The business category of your organization is below the field indicating your Position at that organization.

### Browser Compatibility

PRIMA supports Apple's [Safari](#), Google's [Chrome](#), Microsoft's [Internet Explorer](#) 11+, and Mozilla's [Firefox](#) web browsers.

### Who do I contact for help?

PRIMA support is provided by the AICPA Peer Review Program. Contact us at 919.402.4502 or email [prsupport@aicpa.org](mailto:prsupport@aicpa.org). For assistance with your AICPA.org/CPA.com account, please

contact AICPA Member Service at [service@aicpa.org](mailto:service@aicpa.org) or 888.777.7077. Staff are available to assist 8 AM to 6 PM ET.

### Login error messages

Some users are experiencing an issue where they receive the following message when attempting to log into 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. **If you are experiencing this error or any other issue logging in**, please email [prsupport@aicpa.org](mailto:prsupport@aicpa.org) and provide your name and username (i.e., primary email address) as well as a screenshot of the issue, if available. This will open a support case that AICPA staff can submit to our IT support team to address this issue.

## PRIMA Frequently Asked Questions

[PRIMA FAQs for Enrolled Firms and Peer Reviews](#)