

Important Information on Scheduling your Peer Review

The first step in scheduling your firm's review is completing and submitting the "Peer Review Scheduling Form" . Select from one of three options:

1. **Complete the Form Online:** Go to the California Society of CPAs (CalCPA) web site at www.calcpa.org and click on Peer Review on the left-hand side. Scroll down to the "Resources" section and under "Firms" click on the "Peer Review Scheduling Form" link. On the next page you will click on "Complete the Online Form" link. Use the tab key to navigate the fields and your mouse to point and click on the "check box" questions. Your firm name, firm number and review number are located on the cover page of this mailing. You **MUST** print a copy of the form for your records and for your reviewer, before clicking the "Email Form" button. The completed form cannot be saved.
2. **Download and Print a Blank Form:** From the CalCPA website (www.calcpa.org), click on Peer Review on the left-hand side. Scroll down to the "Resources" section and under "Firms" click on the "Peer Review Scheduling Form" link. You can either fax the completed form to Peer Review 650-802-2350, email the form to peerreview@calcpa.org, or mail the form to CalCPA Peer Review Program, 1235 Radio Rd, Redwood City, CA 94065.
3. **Request a Copy:** Call the Peer Review Program at 800-922-5272 or 650-802-2486, or email your request, including your firm name to peerreview@calcpa.org. A \$50.00 surcharge will be imposed for each packet requested.

Selecting a Reviewer: A listing of qualified peer reviewers is posted on our website www.calcpa.org) under Peer Review. For a listing of qualified reviewers from other states, or for a complete listing of reviewers, you can search the AICPA's website at <http://peerreview.aicpaservices.org/resume/default.asp>. **The team captain/reviewer must have current knowledge of the professional standards applicable to the type of practice being reviewed and must have recent experience in the industries of the engagements being reviewed.**

Review Due Date: Assigned due date is the date that all review documents (report, letter of comments, workpapers, and letter of response, if applicable) must be submitted to the administering entity (California Society of CPAs Peer Review Program). It is recommended that the review should commence 60 to 90 days prior to the due date. If your due date falls between January and April, you may arrange to have your review a few months earlier to avoid having a review during tax season.

Additional information and resources are posted on either the CalCPA website (www.calcpa.org) under Peer Review as well as the AICPA's website (<http://www.aicpa.org/members/div/practmon/index.htm>) to assist you. You may also contact the Peer Review staff at 800-922-5272/650-802-2486 or by email at peerreview@calcpa.org.