# PRE-ASSESSMENT CHECKLIST

FOR EXPERIENCE VERIFICATION ROUTE (EVR) CANDIDATES

Before submitting your Pre-Assessment Request, ensure you have completed the following:

(For a step-by-step instructions on how to create a Pre-Assessment report, please see “Create a pre-assessment report" in the PERT Quick Reference Guide for Students/Candidates)

<table>
<thead>
<tr>
<th>1. Enter your Mentor’s email address in your PERT Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Ensure you are currently employed</td>
</tr>
<tr>
<td>3. In the Attachments tab, upload the following documents:</td>
</tr>
<tr>
<td>✓ Job description, on company letterhead (if your company does not have letterhead, simply have your Supervisor sign your job description)</td>
</tr>
<tr>
<td>✓ Comprehensive resume (if possible)</td>
</tr>
<tr>
<td>✓ Organizational chart, on company letterhead (if possible)</td>
</tr>
<tr>
<td>4. Ensure <strong>no</strong> Technical Competencies are entered</td>
</tr>
<tr>
<td>5. Ensure <strong>no</strong> Enabling Competencies are entered</td>
</tr>
<tr>
<td>6. Ensure the end date of your reporting period is “to Present” – no past or future dates are accepted.</td>
</tr>
<tr>
<td><strong>Acceptable:</strong></td>
</tr>
<tr>
<td>✓ October 3, 2016 to Present</td>
</tr>
<tr>
<td><strong>Not acceptable:</strong></td>
</tr>
<tr>
<td>× October 3, 2012 to October 3, 2015</td>
</tr>
<tr>
<td>× October 3, 2016 to October 3, 2020</td>
</tr>
</tbody>
</table>

If any of the above is not in place, your Pre-Assessment Request will be cancelled, you must correct the error, create a new report, and request again.
Please see below for further information on each Pre-Assessment requirement:

1. **Enter your Mentor’s email address in your PERT Profile**
   A Mentor is a designated accountant who will help you develop your Technical and Enabling Competencies. You will meet with your Mentor twice a year to discuss your progress and they will share their wisdom and insights with you.

   Your Mentor must be a CPA in good standing in BC, and must first register to become a Mentor through the [Mentor Registration Form](mailto:). The approval process currently takes 2-4 weeks.

   Here is a screenshot of where you will enter your Mentor’s information in PERT:

   ![Mentor Email in PERT Profile](image)

   If you are struggling with your Mentor search, you may request access to our Mentor Match Portal, which is our pool of Mentors waiting to be matched with a candidate.

   You may also want to check out [How to Find a CPA Mentor](mailto:) for other ideas.
2. **Ensure you are currently employed**
You must be *currently* employed in the role for which you are submitting the Pre-Assessment report. If you are not currently employed in this role, you will need to wait until you are employed before you will be eligible to submit the Pre-Assessment report. Any past employment can be reported as “Prior Experience” once the Pre-Assessment current employment has been approved.

Since you must be employed in this position, please use the following date format (“to Present” can be selected by simply leaving the end date blank):

✔️ **October 3, 2016 to Present**

The following is an example of what is *not* acceptable:

✗ **October 3, 2012 to October 3, 2015**

3. **Job description on company letterhead or signed by Supervisor**
Please ensure you upload a detailed job description to the Attachments tab in your PERT Profile. If your company does not have letterhead a typed job description signed by your Supervisor would be acceptable as well. You may upload your resume and organizational chart, if these documents are available.

Here is a screenshot of where the Attachments tab is found:

![Attachments Tab](image)

4. **Ensure no Technical Competencies are entered**
It is important that there are *no* Technical Competencies entered under the Technical Competencies tab for the Pre-Assessment report. If this is applicable to you, please copy your report so that you will not lose any content you have entered in your Technical Competencies, create a new Pre-Assessment report (ensuring *no* Technical Competencies are entered), and request again.

The “Copy” function is found under the Report Details tab found here:

![Report Details Tab](image)
5. **Ensure no Enabling Competencies are entered**

It is important that there are *no* Enabling Competencies entered under the *Enabling Competencies* tab for the Pre-Assessment report. If this is applicable to you, please copy your report so that you will not lose any content you have entered in your *Enabling Competencies*, create a new Pre-Assessment report (ensuring *no* Enabling Competencies are entered), and request again.

Please see the screenshot above for where the “Copy” function is located.

6. **Ensure a future date is not quoted as your report period end date**

The start date of the report period is the date you started in the position for which you are submitting the Pre-Assessment. No future date can be quoted as your end date.

Since you must be employed in this position, please use the following date format (“to Present” can be selected by simply leaving the end date blank):

✓ **October 3, 2016 to Present**

The following is an example of what is *not* acceptable:

✗ **October 3, 2016 to October 3, 2020**

Please visit [CPA PER Reporting Requirements](https://www.cpa.ca/en/practical-experience) for further information in this regard.


For questions regarding your Pre-Assessment report, please contact us at [cpabcper@bccpa.ca](mailto:cpabcper@bccpa.ca).