COMPLETING A MENTOR REVIEW
IN 3 EASY STEPS

CPA CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

1 MEET

CPA mentor and student/candidate meet

The objective of a review meeting is to discuss the development of the student/candidate's five enabling competencies:

1. Professional and Ethical Behaviour
2. Problem Solving and Decision Making
3. Communication (oral and written)
4. Self-Management
5. Teamwork and Leadership

CPA mentors and student/candidate are required to meet twice a year via conference call or in person. Sending a text or an email does not count as a form of meeting. Next to these two annual meetings, further meetings may be required.

All mentor review meetings should be completed on or before the "next mentor review date" specified in PERT.

2 REVIEW

CPA mentor to complete a mentor review via PERT, after meeting with the student/candidate

1. Log into PERT
2. Click on the name of the student/candidate who has requested the mentor review meeting
3. Click on the employer name of the most current experience report
4. Check technical competencies tab
5. Review enabling competencies tab

It is the responsibility of the student/candidate to send a mentor review request from PERT which will generate an email to the CPA mentor. Please refer to the students/candidates user guide on "how to request a mentor review" for steps.

3 COMPLETE

Student submits the mentor review meeting request via PERT

1. In the "Mentor Review" tab, click on the date for the requested review in the status date field
2. Click on "edit"
3. Change the "requested" status to "completed"

4. In the "comments" section, CPA mentors will need to provide feedback on*:

- meeting outcomes
- future goals
- progress
- follow-ups
- any concerns about the student/candidate's technical and enabling competencies
- qualify that the student/candidate's selected proficiency levels are indeed reasonable/appropriate

5. Book the next mentor review meeting

We encourage the CPA mentor to have more than two meetings with the student per year, but this is not mandatory. Mentors are required to document all meeting outcomes.

6. Click "save"

Please note, the "comments" section in PERT is visible to the student/candidate, mentor, Program Leader and CPABC Reviewers.

CPA mentors are required to review the student's self-assessment for reasonableness and to provide guidance and advice through discussion with the student with regards to their competency development.

You must have no less than two documented meetings per year. *Additional meetings are encouraged, if there are areas of concern, but are not mandatory. CPA mentors are required to document all meeting outcomes.*