

Requesting a Mentor Review

Schedule a Meeting

Candidate connects with their CPA mentor to set up a review meeting

The objective of a review meeting is to discuss the development of the 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

Candidates are required to set up a meeting with their mentor twice a year via conference call or in person. Sending a text or an email does not count as a form of meeting. In addition to the two meetings, further meetings may be required.

All Mentor Review meetings should be completed on or before the "Next Mentor Review" date specified in PERT.

Verify Reports

Candidate submits Practical Experience Report(s) to Supervisor

You are required to update your experience reports with the Technical and Enabling Competencies that apply for that period and update the report date to the current date.

In order to request a mentor review, **all** active reports must be in "verified" or "reviewed" status. If you have any reports that are not in this status they will not be able to submit a Mentor Review request and must wait until the report status changes to "verified" or "reviewed".

Submit a Request

Candidate submits the Mentor Review meeting request via PERT

1. Log into PERT



2. Click on the "Mentor Reviews" tab
3. Click on "Request Review"
4. Click on "Create"

Your CPA mentor is required to document the occurrence of the meeting in PERT after each mentor meeting. A guide on how to complete this is available to CPA mentors.

Your CPA mentor is not expected to testify to the factual accuracy or the proficiency level of the Technical Competency development. Your CPA mentor may review Technical Competency development for reasonableness.

You must have no less than two documented meetings per year. If more than two meetings are held per year due to concerns, additional meetings are encouraged, but not mandatory, however mentors are required to document meeting.