

## 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 the [PERT User Guide for Future CPAs](#) starting with the section “Document your employment information”).

1. Enter your Mentor’s email address in your PERT profile.
2. Enter your Supervisor information.
3. In the *Attachments* tab, upload your job description; on company letterhead (if your company does not have letterhead, simply have your Supervisor sign your job description).
4. Ensure you are currently employed.

If any of the above is not in place, your Pre-Assessment Request will be cancelled; you must correct the error(s), 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](#). The approval process currently takes 2 - 4 weeks.

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

## PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

### CREATE PROFILE

Once you have completed your profile you will be able to report your practical experience.

<b>CPA Number (Required)</b> <input type="text" value="4"/>	<b>Email (Required)</b> <input type="text" value="fakename@mailinator.com"/>
<b>First Name (Required)</b> <input type="text" value="Fake"/>	<b>Business Phone Number</b> <input type="text" value="123-123-1234"/>
<b>Last Name (Required)</b> <input type="text" value="Name"/>	<b>Personal Phone Number</b> <input type="text" value="456-456-4567"/>
<b>Governing Body (Required)</b> <input type="text" value="British Columbia"/>	
<b>Experience Route (Required)</b> <input type="text" value="Select..."/>	
<b>Language Preference (Required)</b> <input type="text" value="Select..."/>	
<b>Mentor Email</b> <input type="text"/>	←

☐ I have read and agree to the [Student/Candidate Declaration](#).

CANCEL

CREATE PROFILE

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

You will access the Mentor Match Portal on the left hand side navigation bar upon logging into your PERT profile – it is called “Mentor Search”. You’ll find it helpful to review the [Mentor Match Portal FAQ](#) so you can learn more about it.

You may also want to check out [How to Find a CPA Mentor](#) for other ideas.

## 2. Supervisor Information

Please enter your supervisor details (**not your own**) in the Supervisor Information section of the experience report.

Here is a screenshot of where you will enter your Supervisor's information in PERT:

Report Details >	Technical Competencies >	Enabling Competencies >	Notes >	Attachments
<b>REPORT DETAILS</b>				
<b>OVERVIEW</b>				
<b>Status :</b> Reviewed		<b>Calculated Duration :</b>		
<b>Status Change Date :</b> 2023-01-12		<b>Recognized Duration :</b> 0.00 months		
<b>EMPLOYMENT INFORMATION</b>				
<b>Report Type :</b> Current Experience		<b>Experience Type :</b> Experience Verification		
<b>Position Title :</b> Staff Accountant		<b>Employer :</b> ABC LLP		
<b>Position Type :</b> Permanent		<b>Start Date :</b> 2022-06-27		
<b>Average Hours Worked Per Week :</b> 37.50		<b>End Date :</b>		
<b>Leave Taken (days) :</b>				
<b>EMPLOYER INFORMATION</b>				
<b>Primary Clients :</b> External Corporate		<b>Industry :</b> Public Practice		
<b>Total Number of Employees :</b> 5		<b>Number of CPAs Employed :</b> 1 - 5		
<b>Number of Employees in your Department :</b> 5		<b>Number of Direct Reports you Manage :</b> 0		
<b>EMPLOYER ADDRESS</b>				
<b>Street Address :</b> 2 Street		<b>Country :</b> Canada		
<b>City :</b> V		<b>Postal Code :</b> V		
<b>Province :</b> British Columbia				
<b>SUPERVISOR INFORMATION</b>				
<b>First Name :</b> Fake		<b>Position Title :</b> Senior Accountant		
<b>Last Name :</b> Sup4584		<b>Business Phone Number :</b> 0000000000		
<b>Email :</b> sup4584@mailinator.xyz		<b>Language Preference :</b> English		
<b>Accounting Designation :</b> CPA				

### 3. Job description on company letterhead or signed by Supervisor

Please ensure you upload a detailed job description as a PDF file to the "Attachments" tab in your PERT Profile. If we are able to "Edit" the job description, it is considered a cut and paste document (not acceptable).

If your company does not have letterhead, a typed job description signed by your Supervisor would be acceptable as well.

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


Report Details >	Notes >	Attachments ✓
<b>ATTACHMENTS</b>		
In order to validate your employment information, please provide the following:		
<ul style="list-style-type: none"> <li>A detailed current job description which includes your job start date on company letterhead, or a document signed by your HR department.</li> <li>An Organization Chart (Manitoba or International only).</li> <li>Your current resume (Manitoba or International only).</li> </ul>		
<div> <div>Uploaded on 2023-03-15 10:51:50 PM by Fake 573018</div> <div>Test job description .pdf ✓</div> </div>		


#### 4. 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. The Start Date of the report period is the date you started in the position for which you are submitting the Pre-Assessment.

Since you must be employed in this position, please use the following date format:

Acceptable format:

Start Date :  (Required)

2022-01-31 

If your Reporting Status is In Progress, the following fields must be filled out before you complete your report. If you are Pre-assessment Required or Pending Enrollment, leave End Date and Leave Taken (days) blank.

End Date : 

Leave End Date blank.

Please visit [CPA PER Reporting Requirements](#) for further information in this regard.  
Click on the green button called CPA Practical Experience Requirements to access the document.

Please see [CPA Practical Experience Requirements](#) for an overview of the CPA Practical Experience Requirements.

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