

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](#))

	1. Enter your Mentor’s email address in your PERT Profile
	2. Ensure you are currently employed
	3. In the <i>Attachments</i> tab, upload the following documents: <ul style="list-style-type: none"> ✓ Job description, on company letterhead (if your company does not have letterhead, simply have your Supervisor sign your job description) ✓ Comprehensive resume (if possible) ✓ Organizational chart, on company letterhead (if possible)
	4. Ensure <u>no</u> Technical Competencies are entered
	5. Ensure <u>no</u> Enabling Competencies are entered

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](#). The approval process currently takes 2-4 weeks.

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

Français English

CPA CHARTERED PROFESSIONAL ACCOUNTANTS **PRACTICAL EXPERIENCE REPORTING TOOL**

Create Profile

You are about to create your PERT profile.
Once you have completed your profile you will be able to report your practical experience.

● **General**

Name	Sheldon Copland	Student Number	4000056
E-mail	scoiland.st6@mailinator.com	Governing Body	Ontario
Business Phone		Home Phone	(403) 555-1212

PER Program

Experience Path *

Language Preference *

Mentor Email

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](#) 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**

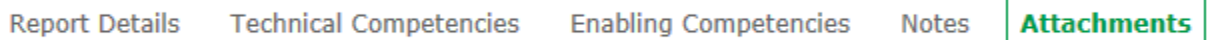
The following is an example of what is not acceptable:

✘ **October 3, 2016 to October 3, 2020**

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.

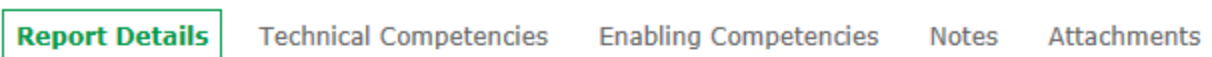
Here is a screenshot of where the Attachments tab is found:



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

Print **Copy** Re-Open

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.

[Report Details](#) [Technical Competencies](#) [Enabling Competencies](#) [Notes](#) [Attachments](#)

Report Details

[Print](#) [Copy](#) [Re-Open](#)

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](#) for further information in this regard.

Please see [PER Requirement Guide 2017](#) for an overview of the CPA Practical Experience Requirements.

For questions regarding your Pre-Assessment report, please contact us at cpabcper@bccpa.ca.