

# PERT Guide for Future CPAs

Effective April 1, 2021

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# Overview

## The CPA Certification Program

To complete the [CPA Certification Program](#), future CPAs must satisfy three components <sup>1</sup>:

- CPA Professional Education Program (CPA PEP)
- Common Final Examination (CFE)
- CPA Practical Experience Requirements (CPA PER)

This document will provide guidance for future CPAs on the completing reports in the Practical Experience Reporting Tool (PERT) in order to meet the requirements of the [CPA PER](#).

Quebec Candidates: If you are reporting your experience in the Practical Experience Reporting Log (PERL), please visit [Ordre Des Comptables Professionnels Agréés Du Quebec](#) for your information.

## CPA Practical Experience Requirements (CPA PER)

The CPA PER comprises the following elements:

1. Qualifying Experience: Gain relevant paid employment that is progressively complex
2. Appropriate Supervision: Supervisors, CPA mentors, program managers and program leaders will provide support throughout your practical experience
3. Reporting and Self-Assessment: Report work experience and self-assess on progress
4. CPA Mentorship: Meet with a mentor semi-annually
5. Assessment by Profession: At key milestones, experience report(s) must be reviewed by the provincial/regional CPA body

Refer to the [Practical Experience Requirements \(CPA PER\)](#) and [CPA Harmonized Practical Experience Policies](#) for detailed requirements.

<sup>1</sup> Please refer to your provincial/regional body for the exact requirements.

## CPA candidates

CPA candidates from the Western, Atlantic and International regions are eligible to begin reporting once they begin the CPA PEP.

## CPA students

CPA students in Ontario are eligible to begin reporting once they are registered with CPA Ontario.

## Future CPAs

For the purposes of this user guide, both candidates and students will be referred to as “future CPAs”.

# The Practical Experience Reporting Tool (PERT)

All future CPAs (excluding those in Quebec) are required to document their practical experience development in the Practical Experience Reporting Tool (PERT). This allows the CPA profession to track their progress and assess whether they have met the [CPA Practical Experience Requirements \(CPA PER\)](#).

In addition, CPA mentors, supervisors, program managers, program leaders and CPA reviewers also use PERT to support a future CPA's journey.

There are three key aspects for reporting your practical experience:

## Get started

- Set up your PERT Profile
- Document your employment
- Add your mentor

## Report your practical experience

- Create reports
- Document your experience
- Meet with your mentor

## Get your experience reviewed

- When required, request a CPA Review of your experience reports

## Experience Routes

Depending on your employer and employment position, a future CPA will be reporting through either the Pre-approved Program Route (PPR) or the Experience Verification Route (EVR).



Pre-Approved Program Route (PPR)	Experience Verification Route (EVR)
<p>Employers offering pre-approved programs have worked with their respective provincial/regional CPA bodies to design a program ensuring that the required experience and competencies can be met within 30 months.</p> <p>If you are employed in a pre-approved program, you must confirm your location, program, training position and mentor (who will have been allocated to you). Contact your program manager if you are unsure of the process.</p>	<p>This flexible, self-directed route allows future CPAs to gain practical experience when employed in a qualifying role, which is determined through a pre-assessment. There are more touchpoints throughout the journey.</p> <p>If you are not employed in a pre-approved program, you must report your experience through EVR.</p>

## Unemployed

If you are unemployed (or your employment does not provide qualifying experience), select “Unemployed” as your experience route. When your situation changes, you will be able to update your experience route and begin reporting.

Future CPAs in a working in a co-op are considered “unemployed” while in school. However, there are some conditions in which an employer may allow them to remain “In Progress” on their roster (e.g. the national firms).

For more information on the two experience routes, please visit the [practical experience overview webpage](#).



# Getting Started

This section will provide guidance on how to get approved to begin reporting in PERT. All future CPAs must set up a PERT profile, document their current employment and add a mentor before they can begin reporting experience in PERT.

Before you can begin, you must register with a provincial/regional CPA body and follow your provincial guidelines on how to get approved to report in PERT.

I am registered with:

CPA Atlantic School of Business  
or CPA International

CPA Western School of Business

CPA Ontario

CPA Quebec

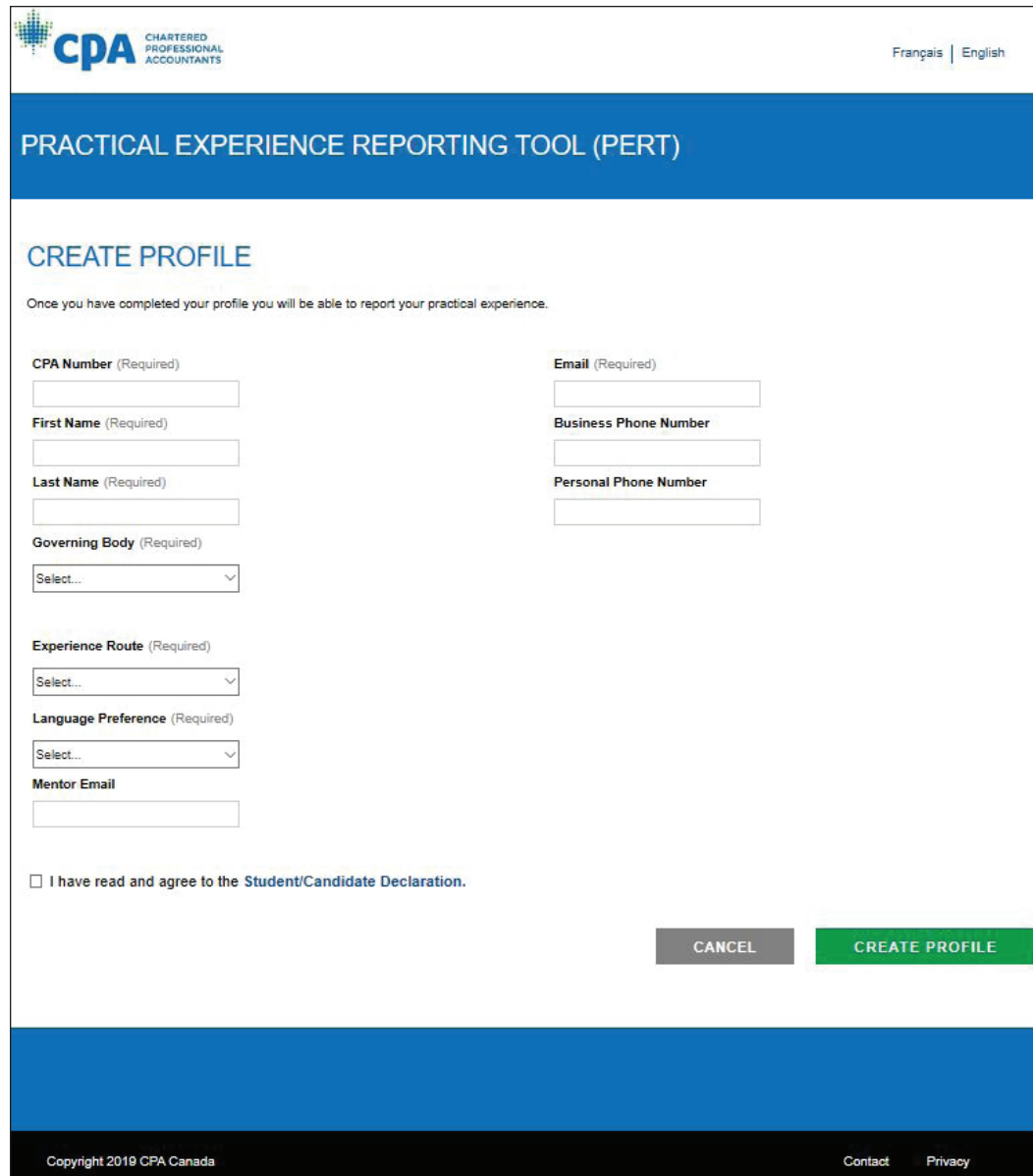
## CPA Atlantic School of Business or CPA International

To get approved to report practical experience with CPA Atlantic School of Business or CPA International, follow this checklist:

- ✓ Create your profile, indicate your experience route and add your mentor.
- ✓ Log in to PERT.
- ✓ Document your current employment information.
- ✓ Submit your employment information and wait to be approved for reporting.

## Create PERT Profile

1. Go to [pert.cpa-services.org/Student/Logon](http://pert.cpa-services.org/Student/Logon) and click **CREATE PROFILE**.



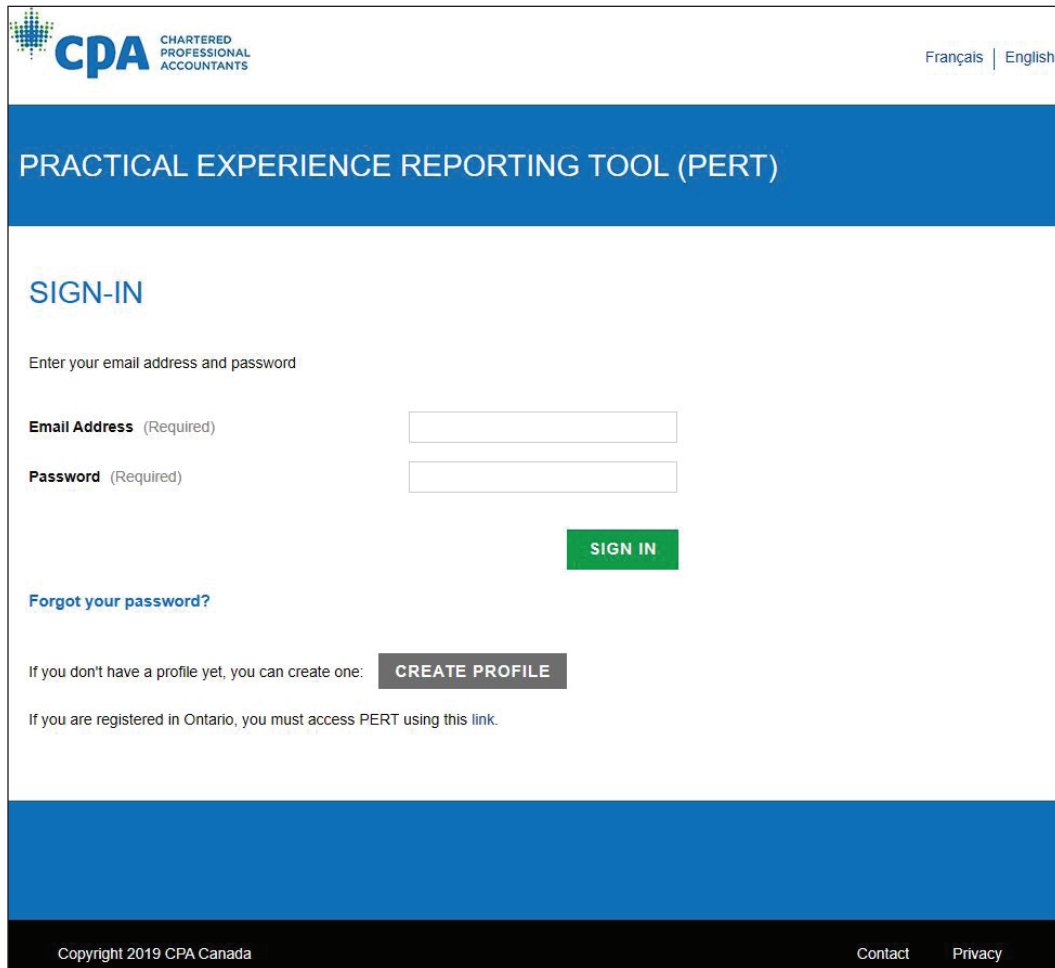
The screenshot shows the 'CREATE PROFILE' page of the Practical Experience Reporting Tool (PERT). The page header includes the CPA Canada logo and the text 'CHARTERED PROFESSIONAL ACCOUNTANTS'. There are links for 'Français' and 'English'. The main heading is 'PRACTICAL EXPERIENCE REPORTING TOOL (PERT)'. Below this is the 'CREATE PROFILE' section, which includes a sub-heading and a note: 'Once you have completed your profile you will be able to report your practical experience.' The form contains several required fields: 'CPA Number (Required)', 'First Name (Required)', 'Last Name (Required)', 'Governing Body (Required)' (a dropdown menu), 'Experience Route (Required)' (a dropdown menu), 'Language Preference (Required)' (a dropdown menu), 'Mentor Email', 'Email (Required)', 'Business Phone Number', and 'Personal Phone Number'. At the bottom of the form is a checkbox labeled 'I have read and agree to the Student/Candidate Declaration.' and two buttons: 'CANCEL' and 'CREATE PROFILE'. The footer of the page includes 'Copyright 2019 CPA Canada' and links for 'Contact' and 'Privacy'.

2. Enter the required information.
  - Identify your [Experience Route](#),
  - [Add your mentor](#),
  - And click **CREATE PROFILE**. You will be sent an email with a link to set your PERT password.

3. Set your password. Once this is done, you will be redirected to log in to PERT.

## Log in to PERT

1. Go to the PERT Sign In page, enter your email address and password associated with your PERT account then click SIGN IN.



The screenshot shows the CPA Canada website header with the logo and "CHARTERED PROFESSIONAL ACCOUNTANTS" text. In the top right corner, there are links for "Français" and "English". Below the header is a blue banner with the text "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)". The main content area is titled "SIGN-IN" and includes the instruction "Enter your email address and password". There are two input fields: "Email Address (Required)" and "Password (Required)". A green "SIGN IN" button is positioned below the password field. Below the button is a link "Forgot your password?". At the bottom of the sign-in section, there is a message: "If you don't have a profile yet, you can create one:" followed by a grey "CREATE PROFILE" button. Below this, it says "If you are registered in Ontario, you must access PERT using this link." The footer of the page is black and contains "Copyright 2019 CPA Canada" on the left and "Contact" and "Privacy" links on the right.

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

Français | English

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

SIGN-IN

Enter your email address and password

Email Address (Required)

Password (Required)

SIGN IN

[Forgot your password?](#)

If you don't have a profile yet, you can create one: [CREATE PROFILE](#)


If you are registered in Ontario, you must access PERT using this [link](#).

Copyright 2019 CPA Canada

Contact Privacy

You will arrive at your Home page.

This is your Home page if you had selected Experience Verification as your Experience Route.


[Home](#) | [Resources](#) | [Français](#) | [English](#) | [Signed in as First Last](#) [Change Password](#) [Sign Out](#)

## PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

### FIRST LAST

**Reporting Status**  
Pre-Assessment Required

**PER Start Date**

**Experience Route**  
Experience Verification

**Mentor**  
Example Mentor

**Next Experience Report Date** ?

**Next CPA Review Due**

[VIEW PROFILE](#)

[HOME](#) [EXPERIENCE REPORTS](#) [CONSOLIDATED SUMMARY](#) [MENTOR MEETINGS](#) [CPA REVIEWS](#)

## HOME

### ACTION ITEMS

**DOCUMENT YOUR CURRENT EMPLOYMENT** <sup>1</sup> **Overdue** Apr 05, 2020 [GET STARTED](#)

Create an experience report with your current employment information, attach any required documentation and click Complete.

[Attention](#)

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

### OVERVIEW

For detailed information, go to the Consolidated Summary page.

[Duration Requirements](#)  
**TOTAL ELIGIBLE DURATION:** 0.0 months

[Competency Requirements](#)

CORE

BREADTH

DEPTH

ENABLING

[Disclaimer](#)

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

Copyright 2021 CPA Canada

[Contact](#) [Privacy](#)

This is your Home page if you had selected Pre-approved Program as your experience route.

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

Home | Resources | Français | English | Signed in as First Last Change Password Sign Out

## PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

**FIRST LAST**

**Reporting Status**  
Pending Enrollment

**PER Start Date**

**Program**  
Assurance Compilation Tax

**Experience Route**  
Pre-approved Program

**Mentor**  
Example Mentor

**Next Experience Report Date** ⓘ

**Next CPA Review Due**  
Upon Completion

**VIEW PROFILE**

**HOME** EXPERIENCE REPORTS CONSOLIDATED SUMMARY MENTOR MEETINGS CPA REVIEWS

### HOME

#### ACTION ITEMS

**DOCUMENT YOUR CURRENT EMPLOYMENT** ⓘ **Overdue** Oct 07, 2020 **GET STARTED**

Create an experience report with your current employment information and click Complete.

**Attention**

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

#### OVERVIEW

For detailed information, go to the Consolidated Summary page.

[Duration Requirements](#)

**TOTAL ELIGIBLE DURATION:**

[Competency Requirements](#)

**CORE** **BREADTH** **DEPTH** **ENABLING**

**Disclaimer**

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

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## Document your current employment


Before you can report your practical experience, your employment must be assessed to determine that it is qualifying experience.

From your *HOME* page:


1. Select GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT.

This will open a blank experience report.

2. Enter the required information and click **CREATE**.

(Tip: If you are unsure of what any of the fields are, click on the  to get a description.)

## CREATE EXPERIENCE REPORT

**Report Type :**  (Required)


Select... ▼


### EMPLOYMENT INFORMATION

**Position Title :** (Required)


**Position Type :** (Required)


Select... ▼

**Average Hours Worked Per Week :**  (Required)


**Start Date :**  (Required)

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 Taken (days) :** 

### EMPLOYER INFORMATION

**Employer :**  (Required)

CANCEL

SAVE

3. **EVR:** Attach your current job description. **PPR:** you do not have to do this step.

(Note: Your job description must include your employment start date, outline your position duties and be on company letterhead. The CPA reviewer will determine if your employment meets qualifying experience.)

4. Return to *Report Details* and click **COMPLETE**.

First Last - Example Position - Example Employer (2021-01-01 - )

REPORT DETAILS NOTES ATTACHMENTS

## REPORT DETAILS

OVERVIEW

Status : New

Calculated Duration :

Status Change Date : 2021-02-05

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Experience Type : Experience Verification

Position Title : Example Position

Employer : Example Employer

Position Type : Permanent

Start Date : 2021-01-01

Average Hours Worked Per Week : 40.00

End Date :

Leave Taken (days) :

EDIT

PRINT

DELETE

COMPLETE

5. You now need to Submit your employment information.

### Submit your employment information

**PPR:** Once you have documented your employment information and added your mentor, your employment information will be sent to your program manager, you do not need to do anything further. Your program manager will contact you if any information requires changes.

If no changes are required, your program manager will confirm your employment within their program. Your reporting status will update from “Pending Enrollment” to “In Progress” and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).

**EVR:** You are required to submit your employment information for pre-assessment to determine that you are employed in a qualifying role.

1. Select GET STARTED on the action item **SUBMIT YOUR EMPLOYMENT INFORMATION**.

The screenshot displays the Practical Experience Reporting Tool (PERT) interface. At the top, the CPA logo and navigation links (Home, Resources, Français, English, Signed in as First Last, Change Password, Sign Out) are visible. The main header reads "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)".

**Left Sidebar:**

- FIRST LAST**
- Reporting Status**: Pre-Assessment Required
- PER Start Date**
- Experience Route**: Experience Verification
- Mentor**: Example Mentor
- Next Experience Report Date** ⓘ
- Next CPA Review Due**
- VIEW PROFILE** (button)

**Main Content Area:**

- HOME** (active tab) | EXPERIENCE REPORTS | CONSOLIDATED SUMMARY | MENTOR MEETINGS | CPA REVIEWS
- ACTION ITEMS**
  - SUBMIT YOUR EMPLOYMENT INFORMATION**

Request a pre-assessment to have your employment assessed.

Apr 17, 2021 **GET STARTED** (button)
- Attention**

Please note that as of April 1, 2021 slight competency changes came into effect, click here to see if these changes impact your reporting.
- OVERVIEW**

For detailed information, go to the Consolidated Summary page.

  - Duration Requirements**

**TOTAL ELIGIBLE DURATION:** 3.6 months
  - Competency Requirements**

CORE	BREADTH	DEPTH	ENABLING
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Disclaimer**

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

You will be navigated to request a CPA Review.



## REQUEST CPA REVIEW

**Type**  
Pre-Assessment

**Status**  
Assessment Requested

**Date Created**  
2020-07-28

### DECLARATION

☐ The information under the "Report Details" in my experience report are accurate.

☐ I have attached my current job description that includes my job start date to my experience report. I understand that my provincial/regional body may require additional information for a pre-assessment evaluation.

**BACK** **REQUEST**

2. Complete the declarations and click **REQUEST**.

Once you have requested your pre-assessment, it will be reviewed by your regional CPA body to determine whether you are employed in a qualifying role. You will be contacted if any information requires changes.

When the pre-assessment is complete, you will receive an email with the results of your pre-assessment and instructions for your next steps.

If your employment is a qualifying role, your Reporting Status will update from "Pre-assessment Required" to "In Progress" and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).

## CPA Western School of Business

To get approved to report practical experience with the CPA Western School of Business, follow this checklist:

- ✓ Access the Practical Experience Orientation Webinar and pass the quiz.
- ✓ Log in to PERT indicate your [experience route](#) and [add your mentor](#).
- ✓ [Document your current employment information](#).
- ✓ [Submit your employment information](#) and wait to be approved for reporting.

### Practical Experience Student Orientation Course and Quiz

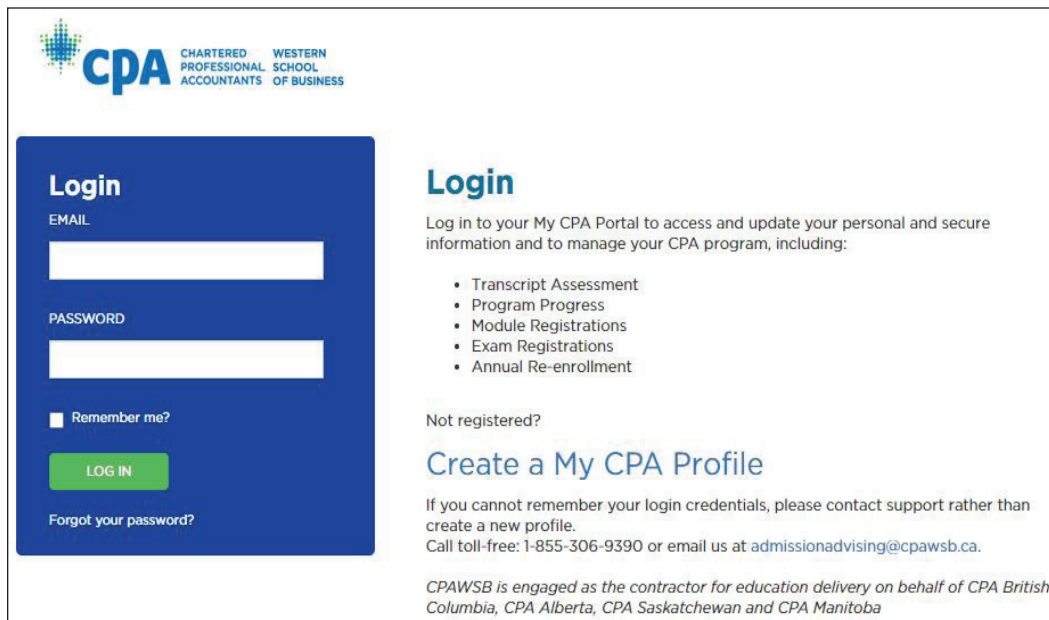
Future CPAs from the CPA Western School of Business are required to complete the Practical Experience Student Orientation Course Webinar and quiz.

1. Access the Practical Experience Student Orientation Course Webinar within [Desire2Learn \(D2L\)](#).
2. After completing the course, you must take a short quiz and achieve a passing score of at least 60% (multiple attempts are allowed).
3. Once you have passed the quiz, wait one business day.
4. After one business day you can create your profile.

### Log in to PERT

The information in your [My CPA Portal](#) is connected to your PERT profile.

1. Log in to [My CPA Portal](#)



**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS WESTERN SCHOOL OF BUSINESS

### Login

EMAIL

PASSWORD

☐ Remember me?

**LOG IN**

[Forgot your password?](#)

### Login

Log in to your My CPA Portal to access and update your personal and secure information and to manage your CPA program, including:

- Transcript Assessment
- Program Progress
- Module Registrations
- Exam Registrations
- Annual Re-enrollment

[Not registered?](#)

### Create a My CPA Profile

If you cannot remember your login credentials, please contact support rather than create a new profile.  
Call toll-free: 1-855-306-9390 or email us at [admissionadvising@cpawsb.ca](mailto:admissionadvising@cpawsb.ca).

*CPAWSB is engaged as the contractor for education delivery on behalf of CPA British Columbia, CPA Alberta, CPA Saskatchewan and CPA Manitoba*

2. Select **Practical Experience** from the *My CPA* menu.



**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS WESTERN SCHOOL OF BUSINESS

**LOG OUT**


### My CPA

- ▶ MY PROFILE
- ▶ PROGRAM ADMISSION
- ▶ REGISTRATIONS
- ▶ PROGRAM MANAGEMENT
- ▶ PROGRAM REQUESTS
- PRACTICAL EXPERIENCE

### My CPA

Welcome to your My CPA home page! From here you can manage and review all your CPA program activities.

3. Select **CLICK HERE TO ACCESS PERT**.

 CHARTERED  
PROFESSIONAL  
ACCOUNTANTS WESTERN  
SCHOOL  
OF BUSINESS

LOG OUT

**Reporting Practical Experience**


In order to obtain the CPA designation, in addition to the education requirements, you must meet the CPA Practical Experience Requirements (CPA PER). Submission of practical experience reports and overall progress in meeting practical experience requirements is managed by the Practical Experience Reporting Tool (PERT). If you have taken the mandatory PER orientation course, you can access PERT by clicking on the link below.

[Click here to access PERT](#)

RETURN

4. Complete the required fields and click **CREATE PROFILE**.

You will arrive at your home page.

 **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

Français | English

## 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</b> 4203136	<b>Email</b> usertest05@mailinator.com
<b>First Name</b> PERTUser	<b>Business Phone Number</b>
<b>Last Name</b> CPATest05	<b>Personal Phone Number</b> 123-123-1234
<b>Governing Body</b> Ontario	

**Experience Route (Required)**  
Select... ▼

**Language Preference (Required)**  
Select... ▼

**Mentor Email**

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

**CANCEL** **CREATE PROFILE**

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This is your Home page if you had selected Experience Verification as your Experience Route.

The screenshot shows the PERT Home page. At the top is the CPA Canada logo and navigation links: Home, Resources, Français, English, Signed in as First Last Change Password, and Sign Out. Below this is a blue header bar with the title "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)".

The main content area is divided into a left sidebar and a main panel. The sidebar, titled "FIRST LAST", contains the following sections:

- Reporting Status:** Pre-Assessment Required
- PER Start Date:**
- Experience Route:** Experience Verification
- Mentor:** Example Mentor
- Next Experience Report Date:** [Question mark icon]
- Next CPA Review Due:**
- VIEW PROFILE** (green button)

The main panel has a breadcrumb trail: **HOME** | EXPERIENCE REPORTS | CONSOLIDATED SUMMARY | MENTOR MEETINGS | CPA REVIEWS. Below this is the "HOME" heading and "ACTION ITEMS" section.

**ACTION ITEMS:**

- DOCUMENT YOUR CURRENT EMPLOYMENT** (with an "i" icon and "Overdue" status). The due date is "Apr 05, 2020" and there is a green "GET STARTED" button. The instruction says: "Create an experience report with your current employment information, attach any required documentation and click Complete."
- Attention:** A grey box with the text: "Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting."

**OVERVIEW:**

- For detailed information, go to the Consolidated Summary page.
- Duration Requirements:** TOTAL ELIGIBLE DURATION: 0.0 months
- Competency Requirements:** Four progress indicators for CORE, BREADTH, DEPTH, and ENABLING, each represented by a circle.
- Disclaimer:** A grey box stating: "The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review."

The footer contains "Copyright 2021 CPA Canada" on the left and "Contact" and "Privacy" links on the right.

This is your Home page if you had selected Pre-approved Program as your Experience Route.

The screenshot shows the CPA Canada Practical Experience Reporting Tool (PERT) Home page. The header includes the CPA logo and navigation links: Home, Resources, Français, English, Signed in as First Last Change Password, and Sign Out. The main title is "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)".

**FIRST LAST**

- Reporting Status:** Pending Enrollment
- PER Start Date:**
- Program:** Assurance Compilation Tax
- Experience Route:** Pre-approved Program
- Mentor:** Example Mentor
- Next Experience Report Date:** Upon Completion
- Next CPA Review Due:** Upon Completion

[VIEW PROFILE](#)

**HOME** | EXPERIENCE REPORTS | CONSOLIDATED SUMMARY | MENTOR MEETINGS | CPA REVIEWS

## HOME

### ACTION ITEMS

**DOCUMENT YOUR CURRENT EMPLOYMENT** <sup>1</sup> **Overdue** Oct 07, 2020 [GET STARTED](#)

Create an experience report with your current employment information and click Complete.

**Attention**

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

### OVERVIEW

For detailed information, go to the Consolidated Summary page.

[Duration Requirements](#)

**TOTAL ELIGIBLE DURATION:**

[Competency Requirements](#)

CORE	BREADTH	DEPTH	ENABLING
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Disclaimer**

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## Document your current employment


Before you can report your practical experience, your employment must be assessed to determine that it is qualifying experience.

From your *Home* page:


1. Click **GET STARTED** on the Action Item DOCUMENT YOUR CURRENT EMPLOYMENT.


This will open a blank experience report.

2. Enter the required information and click **CREATE**.

(Tip: If you are unsure of what any of the fields are, click on the question mark icon  to get a description.)

### CREATE EXPERIENCE REPORT


**Report Type :**  (Required)


Select... 


#### EMPLOYMENT INFORMATION


**Position Title :** (Required)

**Position Type :** (Required)


Select... 


**Average Hours Worked Per Week :**  (Required)


**Start Date :**  (Required)




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 Taken (days) :** 

#### EMPLOYER INFORMATION

**Employer :**  (Required)

CANCEL

SAVE



3. **EVR:** Attach your current job description, your resumé (Manitoba candidates only) and your organization chart (Manitoba candidates only).  
**PPR:** you do not have to do this step.

*(Note: Your job description and organization chart must be on company letterhead, include your employment start date, and outline your position duties. The CPA reviewer will determine if your employment meets qualifying experience.)*

4. Return to *Report Details* and click **COMPLETE**.

First Last - Example Position - Example Employer (2021-01-01 - )

REPORT DETAILS
NOTES
ATTACHMENTS

## REPORT DETAILS

OVERVIEW

Status : New

Calculated Duration :

Status Change Date : 2021-02-05

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Experience Type : Experience Verification

Position Title : Example Position

Employer : Example Employer

Position Type : Permanent

Start Date : 2021-01-01

Average Hours Worked Per Week : 40.00

End Date :

Leave Taken (days) :

EDIT

PRINT

DELETE

COMPLETE

5. You now need to Submit your employment information.

## Submit your employment information

**PPR:** Once you have documented your employment information and added your mentor, your employment information will be sent to your program manager, you do not need to do anything further. Your program manager will contact you if any information requires changes.

If no changes are required, your program manager will confirm your employment within their program. Your reporting status will update from “Pending Enrollment” to “In Progress” and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).

**EVR:** You are required to submit your employment information for pre-assessment to determine that you are employed in a qualifying role.

1. Select GET STARTED on the action item SUBMIT YOUR EMPLOYMENT INFORMATION.

The screenshot shows the CPA Canada Practical Experience Reporting Tool (PERT) dashboard. At the top, the CPA Canada logo is on the left, and navigation links (Home, Resources, Français, English, Signed in as First Last Change Password, Sign Out) are on the right. Below the header is a blue banner with the title "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)".

On the left side, there is a sidebar with the user's name "FIRST LAST" and a list of reporting status options: Reporting Status, Pre-Assessment Required, PER Start Date, Experience Route, Experience Verification, Mentor, Example Mentor, Next Experience Report Date, and Next CPA Review Due. A green "VIEW PROFILE" button is at the bottom of the sidebar.

The main content area has a breadcrumb trail: HOME | EXPERIENCE REPORTS | CONSOLIDATED SUMMARY | MENTOR MEETINGS | CPA REVIEWS. Below this is a "HOME" section with an "ACTION ITEMS" heading. The primary action item is "SUBMIT YOUR EMPLOYMENT INFORMATION", which includes the text "Request a pre-assessment to have your employment assessed." and a date "Apr 17, 2021". A green "GET STARTED" button is next to this item.

Below the action items is an "Attention" box with a warning message: "Please note that as of April 1, 2021 slight competency changes came into effect, click here to see if these changes impact your reporting." This is followed by an "OVERVIEW" section with the text "For detailed information, go to the Consolidated Summary page." and a "Duration Requirements" section showing "TOTAL ELIGIBLE DURATION: 3.6 months".

The "Competency Requirements" section displays four progress indicators: CORE, BREADTH, DEPTH, and ENABLING, each represented by a circle. At the bottom, there is a "Disclaimer" box stating: "The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review."

The footer contains the text "Copyright 2021 CPA Canada" on the left and "Contact Privacy" on the right.

You will be navigated to request a CPA Review.

## REQUEST CPA REVIEW

**Type**  
Pre-Assessment

**Status**  
Assessment Requested

**Date Created**  
2020-07-28

### DECLARATION

☐ The information under the "Report Details" in my experience report are accurate.

☐ I have attached my current job description that includes my job start date to my experience report. I understand that my provincial/regional body may require additional information for a pre-assessment evaluation.

[BACK](#) [REQUEST](#)

2. Complete the declarations and click **REQUEST**.

Once you have requested your pre-assessment, it will be reviewed by your provincial CPA body to determine whether you are employed in a qualifying role. You will be contacted if any information requires changes.

When the pre-assessment is complete, you will receive an email with the results of your pre-assessment and instructions for your next steps.

If your employment is a qualifying role, your Reporting Status will update from "Pre-assessment Required" to "In Progress" and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).

## CPA Ontario

To get started on reporting your practical experience with CPA Ontario, follow this checklist:

- ✓ Log in to PERT indicate your [experience route](#) and add your mentor.
- ✓ Document your current employment information.
- ✓ Submit your [employment information](#) and wait to be approved for reporting.

### Log in to PERT

The information in your CPA student portal is connected to your PERT profile.

1. Navigate to the CPA Ontario website. Navigate to the log In page and under CPA Ontario Students, select [Access the Practical Experience Reporting Tool \(PERT\)](#)
2. Enter your CPA Ontario ID and password associated with your My CPA Account and click **Login**.

To improve your online experience, CPA Ontario has created one point of entry for access to many CPA Ontario online services available to members, students and other stakeholders. To log in, use your CPA Ontario ID and password. You may be prompted to reset your password to ensure it meets our security requirements.

If you are registering for a Professional Development course for the first time, and/or you do not have a CPA Ontario ID, please [create an account](#).

For optimal browser experience, please use Edge, Internet Explorer 11, Chrome or Firefox. Pages may display incorrectly on mobile devices or on Internet Explorer 7, 8, 9 or 10.


**CPA Ontario ID**

**Password**

**LOGIN**

[Forgot CPA Ontario ID](#)  
[Reset Password](#)

3. The first time you log in, you will be asked to enter your [Experience Route](#) and Mentor Email.

 **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

Français | English

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</b> 4203136	<b>Email</b> usertest05@mailinator.com
<b>First Name</b> PERTUser	<b>Business Phone Number</b>
<b>Last Name</b> CPATest05	<b>Personal Phone Number</b> 123-123-1234
<b>Governing Body</b> Ontario	

**Experience Route** (Required)  
Select... ▼

**Language Preference** (Required)  
Select... ▼

**Mentor Email**

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

CANCEL

CREATE PROFILE

Copyright 2019 CPA Canada

Contact | Privacy

4. Click **CREATE PROFILE**

You will arrive on your Home page.

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

Home | Resources | Français | English | Signed in as First Last Change Password Sign Out

## PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

**FIRST LAST**

**Reporting Status**  
Pre-Assessment Required

**PER Start Date**

**Experience Route**  
Experience Verification

**Mentor**  
Example Mentor

**Next Experience Report Date** ?

**Next CPA Review Due**

**VIEW PROFILE**

**HOME** EXPERIENCE REPORTS CONSOLIDATED SUMMARY MENTOR MEETINGS CPA REVIEWS

### HOME

### ACTION ITEMS

**DOCUMENT YOUR CURRENT EMPLOYMENT** <sup>1</sup> **Overdue** **Apr 05, 2020** **GET STARTED**

Create an experience report with your current employment information, attach any required documentation and click Complete.

**Attention**

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

### OVERVIEW

For detailed information, go to the Consolidated Summary page.

**Duration Requirements**  
**TOTAL ELIGIBLE DURATION:** 0.0 months

**Competency Requirements**

**CORE** **BREADTH** **DEPTH** **ENABLING**

**Disclaimer**

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

Copyright 2021 CPA Canada [Contact](#) [Privacy](#)

## Document your current employment

Before you can report your practical experience, your employment must be assessed to determine that it is qualifying experience.

From your *Home* page:

1. Click **GET STARTED** on the Action Item DOCUMENT YOUR CURRENT EMPLOYMENT.

This will open a blank experience report.

## CREATE EXPERIENCE REPORT

**Report Type :** ⓘ (Required)

Select... ▼

### EMPLOYMENT INFORMATION

**Position Title :** (Required)

**Position Type :** (Required)

Select... ▼

**Average Hours Worked Per Week :** ⓘ (Required)

**Start Date :** ⓘ (Required)

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 Taken (days) :** ⓘ

### EMPLOYER INFORMATION ⓘ

**Employer :** ⓘ (Required)

CANCEL SAVE

2. Enter the required information and click **CREATE**.

(Tip: If you are unsure of what any of the fields are, click on the question mark icon ⓘ to get a description.)

3. **EVR:** Attach your current job description. **PPR:** you do not have to do this step.

(Note: Your job description must be on company letterhead, include your employment start date, and outline your position duties. The CPA reviewer will determine if your employment meets qualifying experience.)

4. Return to *Report Details* and click **COMPLETE**.

First Last - Example Position - Example Employer (2021-01-01 - )

REPORT DETAILS NOTES ATTACHMENTS

## REPORT DETAILS

OVERVIEW

<b>Status :</b> New	<b>Calculated Duration :</b>
<b>Status Change Date :</b> 2021-02-05	<b>Recognized Duration :</b>

EMPLOYMENT INFORMATION

<b>Report Type :</b> Current Experience	<b>Experience Type :</b> Experience Verification
<b>Position Title :</b> Example Position	<b>Employer :</b> Example Employer
<b>Position Type :</b> Permanent	<b>Start Date :</b> 2021-01-01
<b>Average Hours Worked Per Week :</b> 40.00	<b>End Date :</b>
<b>Leave Taken (days) :</b>	

EDIT PRINT DELETE COMPLETE

5. You now need to [Submit your employment information](#).

### Submit your employment information

**PPR:** Once you have documented your employment information and added your mentor, your employment information will be sent to your program manager, you do not need to do anything further. Your program manager will contact you if any information requires changes.

If no changes are required, your program manager will confirm your employment within their program. Your reporting status will update from “Pending Enrollment” to “In Progress” and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).



**EVR:** you are required to submit your employment information for pre-assessment to determine that you are employed in a qualifying role.

1. Select GET STARTED on the action item SUBMIT YOUR EMPLOYMENT INFORMATION.

The screenshot shows the CPA Canada Practical Experience Reporting Tool (PERT) interface. At the top, the CPA logo and navigation links (Home, Resources, Français, English, Signed in as First Last, Change Password, Sign Out) are visible. The main header reads "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)".

On the left, a sidebar for "FIRST LAST" includes links for Reporting Status, Pre-Assessment Required, PER Start Date, Experience Route, Experience Verification, Mentor, Example Mentor, Next Experience Report Date, and Next CPA Review Due. A "VIEW PROFILE" button is at the bottom of the sidebar.

The main content area has a breadcrumb trail: HOME > EXPERIENCE REPORTS > CONSOLIDATED SUMMARY > MENTOR MEETINGS > CPA REVIEWS. The "HOME" link is highlighted.

The "ACTION ITEMS" section features a card for "SUBMIT YOUR EMPLOYMENT INFORMATION" with a "GET STARTED" button dated Apr 17, 2021. Below this is an "Attention" box with a link to competency changes.

The "OVERVIEW" section provides a link to "Duration Requirements" (TOTAL ELIGIBLE DURATION: 3.6 months) and "Competency Requirements". The competency requirements are represented by four empty circles labeled CORE, BREADTH, DEPTH, and ENABLING.

A "Disclaimer" box at the bottom states that the CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports, to reassess proficiency levels.

The footer contains "Copyright 2021 CPA Canada" and links for "Contact" and "Privacy".

You will be navigated to a pre-assessment request.

## REQUEST CPA REVIEW

**Type**  
Pre-Assessment

**Status**  
Assessment Requested

**Date Created**  
2020-07-28

### DECLARATION

☐ The information under the "Report Details" in my experience report are accurate.

☐ I have attached my current job description that includes my job start date to my experience report. I understand that my provincial/regional body may require additional information for a pre-assessment evaluation.

[BACK](#) [REQUEST](#)

2. the Student/Candidate Declaration and click **REQUEST**.

Once you have requested your pre-assessment, it will be reviewed by your CPA Ontario to determine whether you are employed in a qualifying role. You will be contacted if any information requires changes.

When the pre-assessment is complete, you will receive an email with the results of your pre-assessment and instructions for your next steps.

If your employment is a qualifying role, your Reporting Status will update from "Pre-assessment Required" to "In Progress" and you will receive a PER Start Date.

Then you can begin [Reporting your Practical Experience](#).

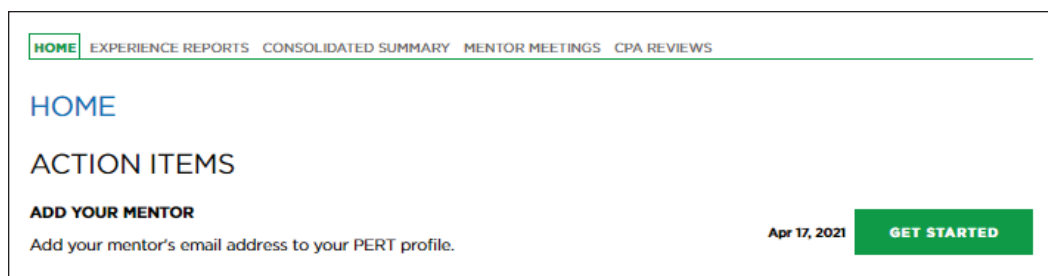
## CPA Quebec

If you are reporting your practical experience in the Practical Experience Learning Log (PERL), contact [Ordre Des Comptables Professionnels Agréés Du Québec](#).

# Adding your Mentor

Future CPAs must be mentored throughout their practical experience journey. You cannot begin reporting until you have entered a mentor into your PERT profile.

When you log in to PERT, select the action item ADD YOUR MENTOR to enter your mentor's email address.



**PPR:** You must be mentored by CPAs from your PPR organization. Your program manager should provide you the details of your mentor.

**EVR:** You can be mentored by any CPA member in good standing. If you do not know any CPA members in good standing, you can use the Mentor Match Portal to search and reach out to an approved mentor.

## Mentor Match Portal

The Mentor Match Portal is where mentors have offered to support future CPAs who do not know any CPA members willing to be their mentor.

The mentors in the portal have provided some information (level of experience, years of experience, biography) to help you in your search. Use this information to find a mentor who matches your situation and/or you believe would be a good mentor for you.

If you need help finding a mentor, click GET STARTED on the action item FIND A MENTOR, or click MENTOR SEARCH, which will take you to the Mentor Match Portal (if you do not have access to the Mentor Match Portal, contact your provincial/regional CPA body).

The screenshot shows a user dashboard for 'FIRST LAST'. The top navigation bar includes links for HOME, EXPERIENCE REPORTS, CONSOLIDATED SUMMARY, MENTOR MEETINGS, and CPA REVIEWS. The left sidebar lists the user's profile information: Reporting Status (In Progress), PER Start Date, Experience Route (Experience Verification), Mentor, Next Experience Report Date (with a calendar icon), and Next CPA Review Due. Below this are two green buttons: VIEW PROFILE and MENTOR SEARCH. The main content area is titled 'HOME' and 'ACTION ITEMS'. It features two action items: 'ADD YOUR MENTOR' with a due date of Jul 01, 2021, and 'FIND A MENTOR'. Both items have a green 'GET STARTED' button. At the bottom, there is an 'Attention' section with a note about competency changes as of April 1, 2021, and a link to see if these changes impact reporting.

Using the search criteria, narrow your search, then read their bio to identify a match. Once you have chosen a mentor, click **SEND REQUEST** to trigger an email notification to this mentor.

## MENTOR MATCH PORTAL

We are pleased to offer you access to the CPA Mentor Match Portal to assist you with finding a CPA mentor who best suits you. The CPA mentorship program is an important component of the practical experience training that students/candidates must complete as they work towards earning their CPA designation.

### HOW THE PORTAL WORKS

This site was designed to assist students/candidates in the Experience Verification route who have been unsuccessful in finding a mentor. The Mentor Match Portal offers you the ability to view a list of approved CPA mentors based on your search criteria.

Find a CPA Mentor in four easy steps:

1. Determine your mentor search criteria
2. Review the search results
3. Choose a mentor
4. Submit your request

Note, only one mentor request can be sent every five business days. If your request is unsuccessful, you will be able to send another request. After three unsuccessful attempts, we will assist you with your finding a mentor match.

Should you have any questions please contact your CPA provincial/regional body.

### SEARCH CRITERIA

To view all available Mentors, leave all criteria blank and click the Search.

**Level of Experience**

**Industry**

**Language**

[BACK](#) [SEARCH](#)

NAME	INDUSTRY	LEVEL OF EXPERIENCE	YEARS OF EXPERIENCE	BIOGRAPHY	MENTORSHIP REQUEST
Fake44205 Lname44205	Public Practice	Manager	5 to 10 years	<a href="#">MENTOR BIO</a>	<a href="#">SEND REQUEST</a>
Fake47901 Lname47901	Public Practice	Manager	5 to 10 years	<a href="#">MENTOR BIO</a>	<a href="#">SEND REQUEST</a>
Fake41358 Lname41358	Public Practice	Manager	5 to 10 years	<a href="#">MENTOR BIO</a>	<a href="#">SEND REQUEST</a>

The email notification contains very little information about you (name and email). However, the mentor can request more information before accepting the request to mentor you, so expect your provincial/regional CPA body to contact you asking for more information (employment history, education, hobbies, etc.).

If the mentor accepts your request, they will automatically be added to your PERT profile.

If the mentor does not accept your request, you will receive an email and be able to select a different mentor. If it takes longer than five days for the mentor to respond, the portal will automatically re-open for you and you will be able to select a different mentor.

# Reporting your Practical Experience

Once approved to report experience from a qualifying role, all future CPAs are required to report their practical experience at least semi-annually (i.e. once you have a [PER Start Date](#), experience must be reported every six months).

Use the following checklist as a general guide for reporting your practical experience. However, be aware that your timeline may change depending on your personal situation.

**PER Start Date:**

- ✓ [Prior Experience](#)
- ✓ Set your next [Experience Report](#)

---

**Semi-annually:**

- ✓ [Report your Current Experience](#)
- ✓ [Meet with Mentor](#)

---

**When required:**

- ✓ [Verify report](#)
- ✓ [Request CPA Review](#)

---

**When your reports reflect you have met all the practical experience requirements:**

- ✓ Request a [Completion CPA Review](#)

## Prior Experience

Prior experience is for experience gained before your PER Start Date. Depending on when your PER Start Date is, you may need to report a portion of your current role in a prior experience report.

You can also report experience from a previous role, as long as it will demonstrate at least one level one sub competency and is for at least three months duration.

A maximum of 12 months of prior experience can be recognized towards your duration requirement.

In some circumstances, there may be a fee to have your prior experience recognized.

See section 2.5.9.1 of the [CPA Practical Experience Requirements \(CPA PER\)](#) for more information.

To report your Prior Experience:

1. Go to your Experience Reports page
2. Click **CREATE REPORT** to generate a new (blank) experience report.

[HOME](#)
[EXPERIENCE REPORTS](#)
[CONSOLIDATED SUMMARY](#)
[MENTOR MEETINGS](#)
[CPA REVIEWS](#)

## EXPERIENCE REPORTS

You must report your experience semi-annually. Your reports must demonstrate progression toward achieving the CPA practical experience requirements.

To view a summary of your reports, click on the Consolidated Summary tab.

REPORT STATUS	REPORT TYPE	REPORT PERIOD	EMPLOYER	POSITION	
Reviewed	Current Experience	2019-05-06 to Present	Pet Valu Canada Inc	Financial Analyst	<a href="#">VIEW</a>

[CREATE REPORT](#)

### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

### 3. Select your Report Type

**Prior PPR** is experience that you gained before your PER Start Date while working within a PPR. Your Program Leader will need to certify this experience.

**Prior EVR** is experience that you gained before your PER Start Date outside of a PPR.

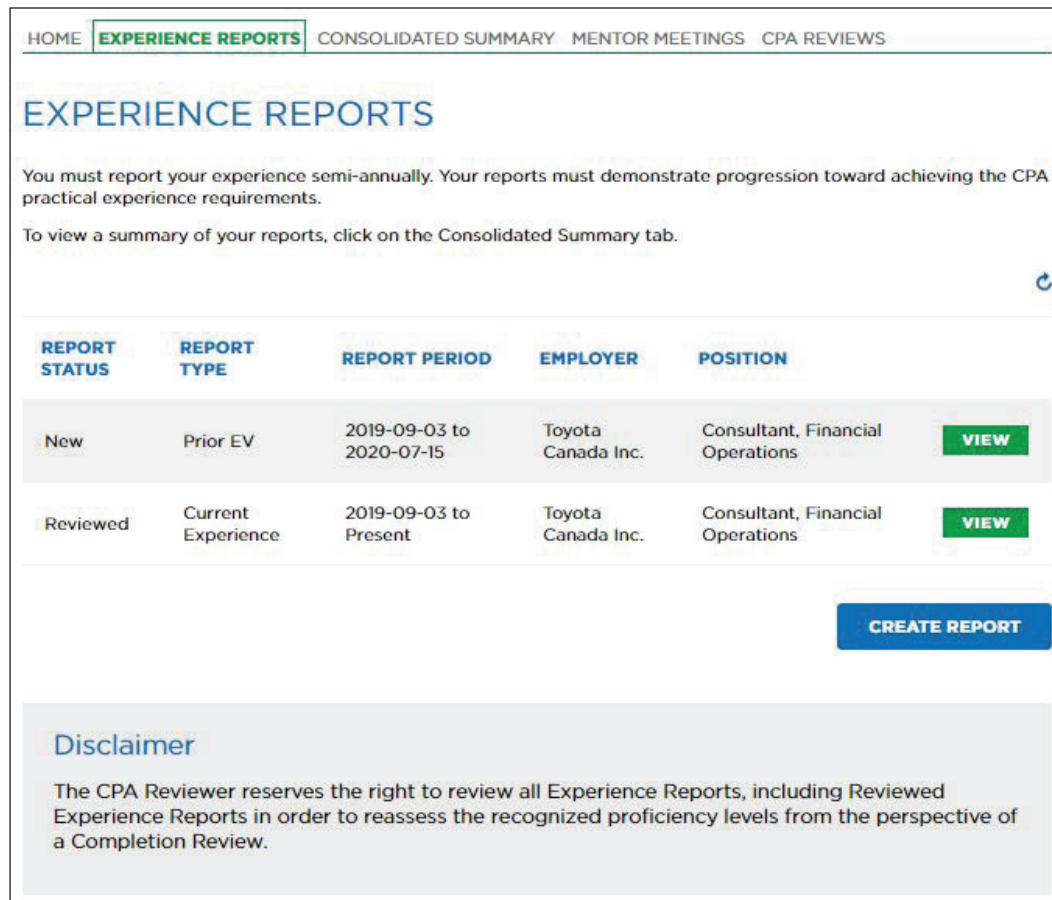
### 4. Complete the rest of your report details.

*(Note: A prior report cannot have an end date after your PER Start Date. If you are still employed in this role, input the end date as the day before your PER Start Date and create a separate current report.)*

### 5. Click **SAVE**.



This will create your prior report. You will be navigated back to your Experience Reports page where you can view and complete your report at any time.



HOME **EXPERIENCE REPORTS** CONSOLIDATED SUMMARY MENTOR MEETINGS CPA REVIEWS

## EXPERIENCE REPORTS

You must report your experience semi-annually. Your reports must demonstrate progression toward achieving the CPA practical experience requirements.

To view a summary of your reports, click on the Consolidated Summary tab.


REPORT STATUS	REPORT TYPE	REPORT PERIOD	EMPLOYER	POSITION	
New	Prior EV	2019-09-03 to 2020-07-15	Toyota Canada Inc.	Consultant, Financial Operations	<a href="#">VIEW</a>
Reviewed	Current Experience	2019-09-03 to Present	Toyota Canada Inc.	Consultant, Financial Operations	<a href="#">VIEW</a>

[CREATE REPORT](#)

### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

6. To complete your report, click **VIEW** to access your newly created Prior report.
7. Navigate to the Technical Competencies tab to fill in the Technical Competency development you gained during your report period.

*(Tip: You are only expected to complete the key sub-competencies that pertain directly to your position for this reporting period. Use the  to help determine which competencies best fit the duties you wish to report.)*

8. Navigate to the Enabling Competencies tab to fill in the Enabling Competency development you gained during your report period (this is optional - if you have not had exposure to enabling competencies yet, it's acceptable to leave these blank).

9. Attach any supporting documentation (E.g the Job Description from this experience).
10. When your report accurately reflects your experience gained during this report period, return to *Report Details* and click **COMPLETE**.
11. Click **SEND TO SUPERVISOR** (if it is a Prior EV report), or **VERIFY** (if it is a Prior PPR report).
12. Once your report is in a verified status, it is ready for a CPA Review.

(Note: **EVR**: You are not required to request a CPA Review until your Next CPA Review Due date (or if you change jobs).

**PPR**: If your prior experience is from a different program/route, a separate CPA review is required for your prior, so we recommend you do this as soon as possible.)

## How to set your Next Experience Report Date

Your Next Experience Report Date will trigger a reminder for you to report your experience in PERT. Once you have a [PER Start Date](#), it is automatically set for six months later, but you can change it at any time.

In addition, each time you complete an experience report, the date will be reset so you can set a new date of your choice.

To change the date:

1. Either click GET STARTED on the action item SET YOUR NEXT EXPERIENCE REPORT DATE, or click VIEW PROFILE.

[HOME](#) [EXPERIENCE REPORTS](#) [CONSOLIDATED SUMMARY](#) [MENTOR MEETINGS](#) [CPA REVIEWS](#)

## HOME

### ACTION ITEMS

**SET YOUR NEXT EXPERIENCE REPORT DUE DATE**

Thank you for completing your experience report. Set your next experience report due date to remind yourself when you need to complete your report again. Remember, you should report your experience semi-annually.

Apr 01, 2021 [GET STARTED](#)

#### Attention

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

### OVERVIEW

For detailed information, go to the Consolidated Summary page.

#### Duration Requirements

**TOTAL ELIGIBLE DURATION:** 0.0 months

#### Competency Requirements

CORE	BREADTH	DEPTH	ENABLING
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

2. Click EDIT.
3. Enter the date you would like to next report your experience.

## EDIT PROFILE

**CPA Number**

555555555

**First Name**

First

**Last Name**

Last

**Governing Body**

Nova Scotia

**Email**

FirstLast@example.com


**Business Phone Number**

00000000

**Personal Phone Number**

00000000

**Next Experience Report Date**



September 2021

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

**Experience Route (Required)**

Experience Verification ▼

**Language Preference (Required)**

English ▼

**Mentor Email**

CANCEL

SAVE

*(Tip: Keep in mind that you are required to report semi-annually. If you have a Next CPA Review date, ensure you report your experience before then.)*

*Suggestions:*

- 1. Set the date to be five/six months from your current date.*
- 2. Set the date to be one-month before your Next CPA Review date.*
- 3. Set the date to line up to your next performance review.*
- 4. Set the date to line up with your contract-end date.)*

## Report your Current Experience

All future CPAs are required to report their practical experience at least semi-annually.

Thirty days prior to your Next Experience Report Date, you will receive a reminder email from PERT to report your current experience.

From your *Home* page:

1. Click GET STARTED on the action item CREATE/UPDATE YOUR NEXT EXPERIENCE REPORT

The screenshot shows the 'HOME' page of the PERT system. At the top is a navigation bar with links: HOME, EXPERIENCE REPORTS, CONSOLIDATED SUMMARY, MENTOR MEETINGS, and CPA REVIEWS. Below the navigation bar, the 'HOME' title is displayed. Under 'ACTION ITEMS', there is a card for 'CREATE/UPDATE YOUR NEXT EXPERIENCE REPORT' with the description 'Report and self-assess your practical experience to date.' and a date 'Apr 01, 2021'. A green 'GET STARTED' button is located to the right of this card. Below the action items, there is an 'Attention' section with a message about competency changes as of April 1, 2021. The 'OVERVIEW' section follows, with a link to 'Duration Requirements' showing 'TOTAL ELIGIBLE DURATION: 0.0 months' and 'Competency Requirements' with four categories: CORE, BREADTH, DEPTH, and ENABLING, each represented by a circle. At the bottom is a 'Disclaimer' section stating that the CPA Reviewer reserves the right to review all Experience Reports.

This will navigate you to your Experience Reports page where you can view all the reports you have already created and/or create a new report.

The easiest way to update your experience, is to make a copy of your last report and add to it (your report must be in a verified (or reviewed) status to be able to copy it).

2. Click to VIEW your latest report
3. Click COPY from the Report Details page.

This will close your existing report and create a new one with the details and technical competencies copied from the original.

4. Click EDIT to update the end date, leave taken (the start date will have been populated), and anything else that has changed, then SAVE your changes.

[HOME](#)
[EXPERIENCE REPORTS](#)
[CONSOLIDATED SUMMARY](#)
[MENTOR MEETINGS](#)
[CPA REVIEWS](#)

## EXPERIENCE REPORTS

You must report your experience semi-annually. Your reports must demonstrate progression toward achieving the CPA practical experience requirements.

To view a summary of your reports, click on the Consolidated Summary tab.

REPORT STATUS	REPORT TYPE	REPORT PERIOD	EMPLOYER	POSITION	
Verified	Current Experience	2018-07-09 to 2019-01-09	Yee Hong Centre for Geriatric Care	Financial Analyst	<a href="#">VIEW</a>
Reviewed	Current Experience	2018-07-09 to Present	Yee Hong Centre for Geriatric Care	Financial Analyst	<a href="#">VIEW</a>

[CREATE REPORT](#)

### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

## Reporting your Technical and Enabling Competency Development

- Navigate to the Technical Competencies page to update your technical competency development gained during your report period.

Your Technical Competencies can be copied from your original report so the sub-competencies column may display previously entered sub-competencies (PPR: your sub-competencies will always be populated by your program).

**EVR:** If you wish to add new experience, use the question mark icon to identify which Technical Competency best matches your experience.

- Click on the technical competency to update your self-assessed proficiency and enter/update your job duties.
- Use the question mark icons to identify which sub-competency best matches your experience, and guidance on which self-assessed proficiency best suits your current experience level.
- Remember to demonstrate progression and save often.

6. Navigate to the Enabling Competencies page to update your enabling competency development gained during your report period.

Your enabling competencies will never be copied over from older reports. You are expected to provide fresh answers to demonstrate your progression.

Use the question mark icon to identify which enabling competency best matches your experience.

- Click on the enabling competency to update your self-assessed proficiency and provide your answers.

Remember to demonstrate progression and save often.

If you provide an enabling competency answer, you must also provide an answer for summary question A.

- Click on either summary question, to update your answers for A (and B if you wish).

7. Attach any supporting documentation (E.g. your updated job description/chargeable hours form).
8. When your report accurately reflects your experience gained during this report period, return to the *Report Details* tab and click **COMPLETE**.

Next, return to your Home page and complete any remaining action items.

*(Note: You can make changes to a report that has been verified but these changes must be re-verified. You cannot make changes to a report that has been reviewed.)*

*(Tip: The easiest way to demonstrate progression is to create new reports each time it is due.)*

*(Note: You can copy an existing report as long as it has been verified or reviewed.)*

## Edit an existing report

You can make edits to an existing report. However, note that:

- If you make changes to a report that has been verified, these changes must be re-verified.

- You cannot re-open/edit a report that is in reviewed status.
- If you have had a significant change in your employment (change in program, location, organization, or a lateral move where your job duties have completely changed) you will need to report a change of job.

To update an existing report:

1. Click **VIEW** to open your existing report.

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## EXPERIENCE REPORTS

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Reviewed	Current Experience	2018-07-09 to Present	Yee Hong Centre for Geriatric Care	Financial Analyst	<a href="#">VIEW</a>

[CREATE REPORT](#)

### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

2. Click **RE-OPEN** to open your report for editing (the report status will update to follow-up).
3. To update your *Report Details* page, click **EDIT** (remember to click **SAVE** when done).
4. To [update your Technical Competencies](#), navigate to the *Technical Competencies* tab, select the appropriate competency and make your changes (remember to click **SAVE** when done).



5. To [update your Enabling Competencies](#), navigate to the *Enabling Competencies* tab, select the appropriate competency and make your changes (remember to click **SAVE** when done).
6. Add any necessary notes or attachments.
7. When your report accurately reflects your changes, return to the *Report Details* tab and click **COMPLETE**.

Remember to return to your Home page and complete any remaining action items.

# Verification

All experience reports must be verified before they can be reviewed by your provincial/regional CPA body. Once your report has been verified, you can re-open it and make changes, but these changes must be verified again.

**PPR:** Once you have completed your report, click VERIFY on the Report Details tab of your experience report. If you have completed the required fields, your report will update to verified.

**First Last - Example Position - Example Employer (2021-01-01 - 2021-02-05)**

**REPORT DETAILS** TECHNICAL COMPETENCIES ENABLING COMPETENCIES NOTES ATTACHMENTS

**REPORT DETAILS**

OVERVIEW

Status : Completed

Calculated Duration : 1.18 months

Status Change Date : 2021-02-05

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Experience Type : Experience Verification

Position Title : Example Position

Employer : Example Employer

Position Type : Permanent

Start Date : 2021-01-01

Average Hours Worked Per Week : 40.00

End Date : 2021-02-05

Leave Taken (days) : 0

PRINT

RE-OPEN

DELETE

SEND TO SUPERVISOR

## Supervisor Verification

**EVR** reports (and **PPR secondment** reports) must be verified by a supervisor.

Your supervisor must hold a position senior to you (direct supervision is preferred), and be able to verify that your reported work experience is accurate for the report period. Your supervisor does not need to be CPA<sup>2</sup>.

When you create your experience report, you will enter your supervisor's email address.

If this email address is not a business email address, you may need to attach confirmation that this supervisor is/was your supervisor during the report period. In this case, your report status will update to Admin Assess after your supervisor has completed their verification and you may be contacted if further information is needed from you.

Examples of confirmation (if required):

- Your job description containing your job start (and end) date and the name of your supervisor.
- A letter from HR (or senior management) confirming you reported to the supervisor for the report period.

When you are ready to have your report verified, click **SEND TO SUPERVISOR** on the Report Details tab of your experience report.

<sup>2</sup> Refer to section 2.7 of the PER for more information.

First Last - Example Position - Example Employer (2021-01-01 - 2021-02-05)

REPORT DETAILS
TECHNICAL COMPETENCIES
ENABLING COMPETENCIES
NOTES
ATTACHMENTS

### REPORT DETAILS

OVERVIEW

Status : Completed

Calculated Duration : 1.18 months

Status Change Date : 2021-02-05

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Experience Type : Experience Verification

Position Title : Example Position

Employer : Example Employer

Position Type : Permanent

Start Date : 2021-01-01

Average Hours Worked Per Week : 40.00

End Date : 2021-02-05

Leave Taken (days) : 0

PRINT
RE-OPEN
DELETE
SEND TO SUPERVISOR

This will trigger an email to be sent to your supervisor with a link to your experience report and instructions on how to verify.

The link will be active for 30 days. If your supervisor does not verify your report within the 30 day, this link will expire, you will be notified and asked to send a new link.

Once your report(s) have been verified, you can request a [CPA Review](#) if necessary.

# Mentor Meetings

Future CPAs are required to report at least two mentors meetings for every 12 months of current experience. If you have not reported the minimum mentor meetings, you will be required to complete an additional 30 days of duration for every missed mentor meeting.

Mentor meetings are an opportunity for you to discuss your development with a CPA and you meet with your mentor each time you update your experience report.

From your *Home* page:

1. Click GET STARTED on your action item SCHEDULE YOUR MENTOR MEETING

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## HOME

### ACTION ITEMS

**SCHEDULE YOUR MENTOR MEETING**

Your experience report is complete and ready for discussion with your mentor. Schedule a Mentor Meeting now.

Apr 01, 2021 [GET STARTED](#)

#### Attention

Please note that as of April 1, 2021 slight competency changes came into effect, [click here](#) to see if these changes impact your reporting.

### OVERVIEW

For detailed information, go to the Consolidated Summary page.

#### Duration Requirements

**TOTAL ELIGIBLE DURATION:** 0.0 months

#### Competency Requirements

CORE

BREADTH

DEPTH

ENABLING

#### Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

2. You will be navigated to your *Mentor Meetings* page.

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## MENTOR MEETINGS

Mentor Meetings are an opportunity for you to discuss your development with a CPA; they must be completed on a semi-annual basis. Each missed meeting will result in a one-month penalty. We recommend you meet with your mentor each time you update your experience report.

Click Request Meeting to notify your mentor that you are ready to discuss your experience reports. You must contact your mentor directly to schedule a date.

No mentor meetings

[REQUEST MEETING](#)

To schedule a mentor meeting you need to have:

- ✓ at least one completed experience report
- ✓ a mentor added to your PERT profile
- ✓ no other active mentor meeting requests
- ✓ a Reporting Status of “In Progress”

3. Click **REQUEST MEETING**.

This will take you to a page where you can request your meeting.

## REQUEST MENTOR MEETING

During this meeting, your mentor will help you reflect on your competencies and discuss whether your self-assessment accurately reflects your experience.

Ensure your experience reports are up-to-date and marked as Complete. Also, gather all the information, examples and questions you might have for your mentor so you can get the most out of your meeting.

Click Request to notify your mentor that you are ready to discuss your experience reports, then contact your mentor directly to schedule a date within 90 days of this request.

If you do not hear back within five business days, reach out to your mentor.

<b>Mentor</b>	Fake36654 lname36654
<b>Meeting Status</b>	Requested

[BACK](#)[REQUEST](#)

4. Click **REQUEST**.

This will send your mentor an email, letting them know you are ready to discuss your experience reports. **Note that this is not a calendar invitation.** You must contact your mentor directly to schedule a date.

After the meeting, your mentor will need to log in to PERT and complete the meeting. This should be done within one week, so follow up with them if they have not done this.

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## MENTOR MEETINGS

Mentor Meetings are an opportunity for you to discuss your development with a CPA; they must be completed on a semi-annual basis. Each missed meeting will result in a one-month penalty. We recommend you meet with your mentor each time you update your experience report

Click Request Meeting to notify your mentor that you are ready to discuss your experience reports. You must contact your mentor directly to schedule a date.

STATUS	MEETING DATE	MENTOR	
Requested		Mentor Example	<div>VIEW</div>

To schedule a mentor meeting you need to have:

- at least one complete experience report
- a mentor added to your PERT profile
- no other active mentor meeting requests
- a Reporting Status of In Progress



# Reporting co-op experience

It is recommended that you begin reporting experience as soon as you are eligible. However, if you have gained experience from a co-op prior to your PER Start Date, this can be reported in a [prior experience report](#).

To report your experience:

1. Follow the steps to [get started in PERT](#) early into your first co-op term.
2. Before your term ends, [report your experience](#) and have your [mentor meeting](#).

If you are reporting in EVR, or your PPR employer has not told you to remain on the roster while in school:

3. On the last day of your co-op (or as soon as possible), report your change of job.

After reporting your change of job, your reporting status and experience route will update to “Unemployed”.

If your employer has asked you to remain on their roster while in school, complete steps 1 and 2 above, then:

3. Update your experience report
4. Meet with your mentor
5. Set your next experience report date to align with the next time you should report.

Your reporting status will remain “In Progress”, but you will not receive any reporting reminders until 30 days before your next experience report date.

# Reporting experience in public practice

Future CPAs working in public practice are required to attach a chargeable hours form (signed by the designated member/program leader). CPA reviewers will use this to confirm that the hour requirements were met.

To attach your chargeable hours form:

1. Download your chargeable hours form from the *Resources* page in PERT  
*(Note that each region/province has its own specific form)*
2. Complete the form.
3. Attach your chargeable hours form to your latest experience report using the attachments tab.
4. [Request your CPA Review](#).

*(Note that the form should be signed within one week of the end date of your latest experience report.)*

# CPA Reviews

To have your experience recognized, your experience reports must be reviewed by your provincial/regional CPA body.

30 days prior to your Next CPA Review date, or if your consolidated summary reflects that you have “Met” all the practical experience requirements, or if you have changed jobs, you are required to request a CPA Review.

During the review, the CPA reviewer will assign the appropriate proficiency (CPA Reviewed Proficiency) and provide notes under the relevant competency area. They may not agree with your self-assessed proficiency level and/or may ask for additional information on your report(s).

If they do not follow-up with any required changes from you, your report will be set to “Reviewed” status. Reviewed status means that your report cannot be re-opened and edited.

There are five types of CPA Reviews:

## 12-Month CPA Review

**Required for EVR:** Your [Next CPA Review date](#) will have been set by the CPA reviewer as either 12 months from your PER Start Date, or 12 months from your job start date. This is to encourage you to send your experience reports for a CPA Review once you have 12 months of experience. The CPA reviewer will identify whether you are on-track to complete your practical experience requirements.

## Student Requested CPA Review

Student requested CPA Reviews should primarily be used if you have prior experience from a different employer.

If you are PPR and you have prior reports from a different PPR (or prior EVR reports) you must have these reports reviewed before you can have your current reports reviewed.

## Change of Job CPA Review

If you have changed jobs while reporting practical experience, you will need to send your experience reports in for a Change of Job CPA Review. You must do this within 90 days of your job change.

## Completion CPA Review

If your Next CPA Review is Upon Completion, you are not required to request a CPA Review until your consolidated summary reflects that you have “Met” all the practical experience requirements. As soon as your consolidated summary reflects that you have met the requirements, you will receive an action item: COMPLETION REVIEW DUE.

## Profession Requested CPA Review

If none of the above fits your situation and the CPA reviewer has specifically requested for you to request a CPA Review (they will have provided comments in the results of your last review with specific information), select Profession Requested CPA Review.

# Requesting a CPA Review

Before you request a CPA Review, ensure your experience reports are fully up to date.

If you have the action item CREATE/UPDATE YOUR NEXT EXPERIENCE REPORT, complete this first.

Once your experience reports are up to date and are in verified status (and your mentor meetings have been documented):

1. Either: Click GET STARTED on the action item CPA REVIEW DUE (or COMPLETION REVIEW DUE) or;

Navigate directly to the CPA Reviews page.


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## CPA REVIEWS

To have your competencies recognized toward meeting the Practical Experience Requirements, your experience reports must be reviewed by the CPA profession. Only verified experience reports can be reviewed.

Select Request CPA Review if your experience reports:

- accurately reflect experience gained to date
- have required documents attached
- have been verified.



REQUESTED	COMPLETED	STATUS	
2019-05-27	2019-06-27	Completed	<a href="#">VIEW</a>
2017-06-03		Cancelled	<a href="#">VIEW</a>

[REQUEST CPA REVIEW](#)

2. Click **REQUEST CPA REVIEW**.

### REQUEST CPA REVIEW

Type	Assessment
Status	Assessment Requested
Date Created	2020-07-30

Select the reason you are requesting a CPA Review:

Review Reason (Required) Change of Job Assessment

### DECLARATION

☐ I have reviewed the definitions/requirements for the technical competencies that I have populated in my experience report(s) and addressed them in my responses.

☐ If employed in public practice, I have attached the chargeable hours form to support my competency development.

☐ My experience report(s) for assessment accurately reflect my experience and are in "verified" status.

☐ I acknowledge that my required semi-annual mentor reviews are documented in the PERT and are in "completed" status. If not, a duration penalty will be assessed for each undocumented mentor review.

BACK
REQUEST

3. Identify your review reason (and PPR, identify your program leader).

4. Complete the declaration and click REQUEST.

**EVR:** This will send a request to your provincial/regional body to review your verified reports.

**PPR:** This will send a request to your program leader (or program manager if the status is data check, then on to your program leader) for their sign off. Once your program leader has signed off, the request will be sent to your provincial/regional CPA body.

## Additional Information Required

If the CPA reviewer does not agree with your self-assessed proficiency level, but thinks you are close or missing more detail in your responses, they may ask for additional information.

You will receive an email notification and you must review the suggestions and re-submit your CPA Review within 30 days or the CPA Review will be cancelled.

From your *Home* page:

1. Click GET STARTED on the action item ADDITIONAL INFORMATION REQUIRED.

You will be navigated to the *CPA Reviews* page.

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## CPA REVIEWS

To have your competencies recognized toward meeting the Practical Experience Requirements, your experience reports must be reviewed by the CPA profession. Only verified experience reports can be reviewed.

Select Request CPA Review if your experience reports:

- accurately reflect experience gained to date
- have required documents attached
- have been verified.

REQUESTED	COMPLETED	STATUS	
2020-12-08		Follow-Up	<a href="#">VIEW</a>

To request a CPA Review:

- Reporting status must be In Progress.
- You must have at least one verified report.
- You must not have any other CPA Reviews outstanding.

2. Click **VIEW** on the CPA Review that is in “Follow Up” status.
3. Read the comments provided by the CPA reviewer and follow their instructions.

These instructions will generally ask you to go to your experience report(s), navigate to specific competencies (or check them all), read the Reviewer Notes and apply the suggested changes.

4. Apply the suggested changes and [verify](#) the reports again (if required).
5. When you are ready, click on the action item ADDITIONAL INFORMATION REQUIRED again.
6. Click **VIEW** to open the CPA Review that is in “Follow Up” status.
7. Click **RE-SUBMIT**.

This will send your experience reports back to the CPA reviewer.

# Glossary

These definitions are found in the CPA Practical Experience Requirements (CPA PER); they are not intended to modify or interpret provincial/regional CPA regulations or bylaws.

**Autonomy:**

The degree of independence CPA students/candidates assume in carrying out a task. See also *Circumstance* and *Complexity*.

**Breadth:**

The requirement for CPA students/candidates to gain proficiency in at least eight technical competency sub-areas, of which four must be at Level 2 proficiency and the remaining four at least at Level 1 proficiency. See also *Depth, Core, Competency sub-area and competency statements* and *Proficiency level*.

**Chargeable hours:**

Hours supervised (directly or overall) by a CPA registrant that are normally chargeable to clients. Chargeable hours do not include time spent on “work of a routine clerical nature.”

**Circumstance:**

Situations are either routine or non-routine in nature. See also *autonomy* and *complexity*.

**Routine** — Circumstances typically encountered by and requiring the knowledge expected of newly certified CPAs.

**Non-routine** — Circumstances not typically encountered by newly certified CPAs; may require advanced technical expertise.



**Competency area:**

One of the 11 competency areas defined in The CPA Competency Map. There are six technical competency areas: Financial Reporting, Management Accounting, Taxation, Strategy and Governance, Finance, and Audit and Assurance; and five enabling competency areas: Professional and Ethical Behaviour, Problem-Solving and Decision-Making, Communication, Self-Management, and Teamwork and Leadership. See also *Competency sub-area and competency statements*.

**Competency sub-area and competency statements:**

The specific technical competency statements are grouped into 20 competency sub-areas. Each competency area has between three to four competency sub-areas. See also *Competency area* and *CPA Competency Map*.

**Complexity:**

The degree of difficulty associated with the number and nature of interrelationships and ambiguities that must be considered simultaneously.

There are three levels of complexity:

**Low complexity** — Little difficulty is associated with a small number of straightforward and frequently encountered issues; may achieve competence relying on “rote” approach.

**Moderate complexity** — Medium difficulty is associated with a number of interconnections or variables that need to be considered simultaneously; circumstances may be less clear and require approaches that are not practiced frequently.

**High complexity** — Considerable difficulty is associated with a large number of interrelationships and ambiguities that must be considered simultaneously; often requires innovative approaches. See also *Autonomy* and *Circumstance*.

**Core:**

All CPA students/candidates must demonstrate technical proficiency in any three competency sub-areas, at least at Level 1 proficiency, in financial reporting and/or management accounting. See also *Breadth, Depth, Competency sub-area and competency statements*.

**CPA:**

Canadian Chartered Professional Accountant; while there are other international CPA designations, all references in this document refer to the Canadian designation.

**CPA candidate:**

Individuals who are registered with a provincial or regional body and:

- are enrolled in a CPA Professional Education Program (CPA PEP), either through the profession's CPA PEP or through an accredited graduate level program offered by a post-secondary institution; or
- have completed the CPA PEP modules and have yet to successfully complete the Common Final Examination (CFE), and/or their practical experience requirements.

*Note that the terms “candidate” or “student” may be used by provincial/regional bodies, depending on provincial/regional regulation. See CPA student.*

**CPA certification program:**

All elements of the CPA program required for certification, including academic prerequisites, the CPA Professional Education Program, the Common Final Examination, and qualifying practical experience.

**CPA competency Map:**

The CPA publication that profiles the competencies required of a CPA on the path to, and upon, certification. The competency statements and defined proficiency levels for practical experience are modified from those in the *CPA Competency Map*. These adjustments were made to reflect what CPA students/candidates are expected to demonstrate through practical experience.

**CPA experience verification:**

The CPA practical experience model in which commences when CPA students/candidates are employed in any position that allows them to gain experience in at least one sub-competency area at least Level 1 proficiency. The experience is approved by a provincial/regional body as the experience is gained.

**CPA pre-approved program:**

Programs offered by employers that allow CPA students/candidates to satisfy all of the practical experience requirements within the required minimum term of practical experience. Pre-approved programs are monitored by the profession to ensure the approved training program is being followed.

**CPA review**

For purposes of practical experience, CPA review includes CPA students/candidates performing self-assessments of the level of proficiency developed for each competency area, and a provincial/regional body assessing the experience of CPA students/candidates. The CPA review is called “Assessment” in the CPA PER. See also *Reporting*, *Competency area* and *Proficiency level*.

**CPA student:**

Individuals registered with a provincial/regional body and working towards prerequisites for admission to CPA PEP — either in CPA preparatory courses or in recognized courses and programs offered by post-secondary institutions.

*Note that the term “student” may be used by provincial/regional bodies to refer to CPA candidates, depending on provincial/regional regulation. See CPA candidate.*

**Depth:**

The requirement for CPA students/candidates to gain proficiency in all technical competency sub-areas relating to one competency area, with at least two competency sub-areas being at Level 2 proficiency. The remaining competency sub-areas need to be at least at Level 1 proficiency. See also *Breadth, Core, Competency sub-area and competency statements*.

**Enabling competencies:**

The essential skills for ethical behaviour, decision making, problem-solving, communication, and leadership required of a professional accountant. See also *Competency area, the CPA Competency Map, and Technical competencies*.

**Foundational level:**

An employment position in which the majority of technical proficiency is at Level 0, with only one competency sub-area at Level 1 proficiency.

**Mentor:**

A CPA, or another individual otherwise approved by a provincial/regional body under the requirements contained in the CPA PER, who provides guidance to CPA students/candidates on competency development, and who models and facilitates the understanding of the CPA profession's values, ethics and attitudes.

**Practical experience reporting tool (PERT):**

The online tool for CPA students/candidates to report their practical experience. PERT is used in all provinces/regions, with the exception of Quebec.

**Pre-approved program leader:**

The senior CPA responsible for an office's preapproved program(s). This individual is sufficiently senior to adjust the duties of CPA students/candidates to provide opportunities to obtain the technical and enabling competencies required of the training program. See also *CPA pre-approved program, Mentor and Supervisor*

**Proficiency level:**

At the point of certification, CPA students/candidates are expected to demonstrate competence (a combination of attitude, skill, and knowledge) at defined levels of proficiency. Three distinct and progressively

higher levels of proficiency are described, reflecting the increase in the ability of CPA students/candidates throughout the program. Complexity, circumstance, and autonomy are considered in determining proficiency levels. Generally, as complexity increases and/or routine work decreases and/or autonomy increases, the proficiency level increases.

There are three levels of proficiency:

1. **Level 0** — Experience that is at an administrative or clerical level.
2. **Level 1** — Experience that is at the professional level but lower than that expected of a newly certified CPA. This can include experience with tasks that are routine in nature, of a low level of complexity, and/or are executed with little autonomy.
3. **Level 2** — The experience level expected of a newly certified CPA.  
See also *Autonomy*, *Circumstance*, and *Complexity*.

**Provincial/regional body:**

A professional accounting body that is a member of CPA Canada.

**Reporting:**

CPA students/candidates are required to capture all practical experience in experience reports. The reports contain factual information such as the type of experience being obtained (through experience verification or through a pre-approved program) and duration, as well as an assessment of the experience.

**Secondment:**

Qualifying experience obtained outside of the pre-approved program that does not require CPA students/candidates to switch to experience-verification.

**Self-employed:**

Individuals who work under contract or in a consultative capacity for someone other than themselves are not considered to be self-employed.

**Supervisor:**

The person to whom CPA students/candidates report. In experience verification, the supervisor verifies that the experiences of CPA students/candidates are appropriately reflected in experience reports. In pre-approved programs the supervisor assigns work according to the program. Ideally, the supervisor is also a professional accountant. See also *Mentor*.

**Technical competencies:**

The abilities expected of professional accountants and performed by professional accountants in many roles in public practice, industry, and the public sector. For purposes of practical experience, the required technical competencies have depth, breadth and core proficiency standards. See also *Competency area, CPA Competency Map, Depth, Breadth, Core* and *Enabling competencies*.

# Appendix

Below are definitions of the fields and terms you will see throughout PERT. For the purposes of this appendix, we will refer to both candidates and students as 'future CPAs'.

## Future CPAs Profile

The profile contains your personal information. Only you can view your profile, although some information is displayed in other areas.

Your *Profile* page will display the following:

<b>CPA Number</b>	The unique identifier for every individual registered with a provincial/regional CPA body.
<b>First Name</b>	Your first name
<b>Last Name</b>	Your last name
<b>Governing Body</b>	The provincial/regional CPA body that you are registered with.
<b>Email</b>	The email that the provincial/regional CPA body will use to contact you.
<b>Business Phone Number</b>	The phone number that the provincial/regional CPA body will use to contact you.
<b>Personal Phone Number</b>	The additional phone number that the provincial/regional CPA body will use to contact you.

<b>Experience Route</b>	<p>This is the “route” you are reporting experience through.</p> <ul style="list-style-type: none"> <li>• <b>Pre-Approved Program Route (PPR):</b> Working within a pre-approved program where your employer ensures exposure to all the required experience.</li> <li>• <b>Experience Verification Route (EVR):</b> Not employed in a pre-approved program, this self-directed, flexible route has more touchpoints.</li> <li>• <b>Unemployed:</b> Unemployed, or not employed in a qualifying role.</li> </ul>
<b>Language Preference</b>	Your preferred language of communication (English or Français).
<b>Organization</b>	The organization that you are employed with. This is only visible if your Experience Route is Pre-approved Program.
<b>Location</b>	The location of your workplace. This is only visible if your Experience Route is Pre-approved Program.
<b>Program</b>	The pre-approved program in which you are enrolled. This is only visible if your Experience Route is Pre-approved Program.
<b>Mentor</b>	<p>The CPA who is supporting you throughout your practical experience.</p> <p>A mentor is required before you can get a PER Start date.</p>
<b>Mentor Email</b>	The contact email for your mentor. this must match the email address listed in your mentor’s profile.
<b>Next Experience Report Date</b>	<p>The date displayed triggers a notification reminder to document your experience.</p> <p>Once you have completed your first report, you will be prompted to enter your preferred date for your next reminder.</p> <p><b>Note:</b> you are required to report experience semi-annually.</p>

## Future CPAs Home

The future CPA's *Home* page displays any upcoming or outstanding action items and an overview of what requirements have been reported.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The future CPA's *Home* page will display the following:

<b>PER Start Date</b>	The date set once the future CPA is approved for reporting and have added their mentor. Once this date is set, reporting can begin.
<b>Experience Route</b>	<p>This is the “route” the future CPA is reporting experience through.</p> <ul style="list-style-type: none"> <li>• <b>Pre-Approved Program Route (PPR):</b> Working within a pre-approved program where the employer ensures exposure to all the required experience.</li> <li>• <b>Experience Verification Route (EVR):</b> Not employed in a pre-approved program, this self-directed, flexible route has more touchpoints.</li> <li>• <b>Unemployed:</b> Unemployed, or not employed in a qualifying role.</li> </ul>
<b>Mentor</b>	<p>The CPA who is supporting the future CPA throughout their practical experience.</p> <p>A mentor is required before the future CPA can get a PER Start date.</p>
<b>Next CPA Review Date</b>	<p>Either displays a specific date or “Upon Completion”.</p> <ul style="list-style-type: none"> <li>• <b>Date</b> displays the next scheduled date experience reports are required to be sent to the provincial/regional CPA body for CPA Review.</li> <li>• <b>Upon Completion</b> means a CPA Review is only required when Core/Breadth/Depth, Enabling and Duration are all reported as “Met”.</li> </ul> <p>A CPA Review is also required if the future CPA changes jobs.</p>



<b>Next Experience Report Date</b>	<p>The date displayed triggers a notification reminder for the future CPA to document their experience.</p> <p>Once they have completed their first report, they will be prompted to enter a preferred date for their next reminder.</p> <p><b>Note:</b> future CPAs are required to report experience semi-annually.</p>
<b>Action Item</b>	<p>Displays any upcoming or outstanding action items that a future CPA is required to complete as part of the practical experience reporting process.</p> <p>Each action item has a COMPLETE button. Click on this button to proceed onto the next step (only Future CPAs can complete their action items).</p> <p>Penalties may apply if items are not completed.</p>
<b>Total Eligible Duration</b>	<p>This is a calculation of all qualifying duration reported and eligible to be recognized.</p>
<b>Competency Requirements</b>	<p>This is a display of each competency (Technical – Core, Depth and Breadth, and Enabling) and whether it has been reported as “met” or “not met”.</p>

## Experience Reports

The future CPA's *Experience Reports* page displays a list of all experience reports.

These experience reports are how a future CPA documents their development toward the required practical experience competencies. The provincial/regional CPA body will review these reports and determine whether the practical experience requirements have been met.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Experience Reports* page will display the following:

<b>Report Status</b>	<p>Indicates the current status of the experience report.</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Future CPA has created the report but has not completed it.</li> <li>• <b>Complete:</b> Future CPA has completed their report and is ready to discuss with their mentor and/or have the report verified.</li> <li>• <b>Follow-up:</b> Indicates that an update/correction needs to be made.</li> <li>• <b>Verification Requested:</b> The report has been sent to the supervisor to verify the factual accuracy of the experience reported.”</li> <li>• <b>Admin Assess:</b> An exception has occurred. The PERT administrator will assess it to determine what is needed.</li> <li>• <b>Verified:</b> The report has been verified and is ready to be sent for CPA Review if due.</li> <li>• <b>Reviewed:</b> The CPA reviewer has reviewed this report. It cannot be edited any further.</li> </ul>
<b>Report Type</b>	<p>Indicates what type of experience is being reported:</p> <ul style="list-style-type: none"> <li>• <b>Current Experience:</b> Experience obtained after the PER Start Date.</li> <li>• <b>Prior EV:</b> Experience obtained before the PER Start Date gained in the Experience Verification Route.</li> <li>• <b>Prior PPR:</b> Experience obtained before the PER Start Date gained in the pre-approved program route.</li> <li>• <b>Catch up:</b> An exception report should be used only if instructed to by the provincial/regional CPA body.</li> </ul>

<b>Report Period</b>	<p>This indicates the time period this report covers. Experience reported should have been obtained during this report period.</p> <p>The report period calculates towards the duration requirement.</p>
<b>Employer</b>	<p>Displays the employer of the future CPA from the report period.</p>
<b>Position</b>	<p>Displays the position (job title) of the future CPA from the report period.</p>
<b>View</b>	<p>Click on this button to view the experience reported.</p>

## Inside an Experience Report

On the *Experience Reports* page, clicking to view an experience report will open to the *Report Details*. You will see there are five sections to an experience report.

These sections are all visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The sections contain the following:

<b>Report Details</b>	<p>Contains the overall details of the experience report (for example, the employment information and supervisor information).</p> <p>On this page, a future CPA can:</p> <ul style="list-style-type: none"><li>• <b>Edit:</b> if the experience report is in a new, follow-up or complete status.</li><li>• <b>Delete:</b> if the experience report is in a new, follow-up or complete status.</li><li>• <b>Complete:</b> if the experience report is in a new or follow-up status.</li><li>• <b>Send to supervisor:</b> if the experience report is for EVR and in a complete status.</li><li>• <b>Cancel sent to supervisor:</b> if the experience report is in a verification requested status.</li><li>• <b>Verify:</b> if the experience report is for PPR and in a complete status.</li><li>• <b>Copy:</b> if the experience report is in verified or reviewed status.</li><li>• <b>Re-open:</b> if the experience report is in verified status</li><li>• <b>Print:</b> any experience report. Using this function will display all sections of the report on one page.</li></ul>
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<b>Technical Competencies</b>	<p>Contains a list of each technical competency.</p> <ul style="list-style-type: none"> <li>• <b>Competency Area:</b> Clicking on each competency area will direct you to the sub-competency details for that competency area.</li> <li>• <b>Your Sub-Competencies:</b> Indicates which sub-competencies have been reported and/or verified (if required).</li> </ul> <p>Clicking on the competency area is how the future CPA reports their experience within each sub-competency. Supporters can also click into each competency area and view the reported experience.</p> <p>Note: the (?) contains more information about the terms and guiding questions to help the future CPA know which technical competency to report against in relation to their job.</p>
<b>Enabling Competencies</b>	<p>Contains a list of each enabling competency.</p> <ul style="list-style-type: none"> <li>• <b>Enabling competency:</b> Clicking on each question will direct you to the details for that question.</li> <li>• <b>Answered:</b> A check mark will indicate which question contains an answer.</li> <li>• <b>Self-assessed proficiency:</b> displays the self-assessed proficiency if the future CPA has entered one.</li> <li>• <b>CPA reviewed proficiency:</b> displays the CPA reviewed proficiency if the report has been reviewed. The CPA reviewed proficiency overrides the self-assessed proficiency.</li> </ul> <p>Summary Questions are also required if any enabling competency question has been answered.</p> <ul style="list-style-type: none"> <li>• <b>Summary question:</b> Clicking on each question will direct you to the details for that question.</li> <li>• <b>Answered:</b> A check mark will indicate which question contains an answer.</li> </ul> <p>Clicking on each question is how the future CPA answers them. Supporters can also click into each question and view the reported experience.</p> <p>Note: the (?) contains supporting information to help the future CPA answer the enabling competency questions</p>

<b>Notes</b>	Here you can view any Notes that have been entered.
<b>Attachments</b>	Here you can view and/or attach any attachments on this report.

## Consolidated Summary

The future CPA's *Consolidated Summary* page displays a list of all experience reports. Here you can consolidate all experience reports to see a full summary of what has been reported.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

Select the specific experience reports or select all and click **VIEW SUMMARY**.

The future CPA's *Consolidated Summary* page will display the following:

<b>Duration Requirement</b>	This section provides an overview of leave, any duration required adjusted for the leave allowance, and penalty to calculate the total eligible duration.
<b>Competency Assessment</b>	This section matches the competencies the future CPA reported against the practical experience requirements of core, breadth, depth and enabling.
<b>Enabling Competencies</b>	To view more details of the enabling competencies, reported click on the +.
<b>Technical Competencies</b>	To view more details of the technical competencies reported, click on the +.

## Mentor Meetings

The future CPA's *Mentor Meetings* page displays a list of all mentor meetings.

This is how future CPAs and mentors document their meetings (which are required semi-annually when future CPAs update their experience reports).

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Mentor Meetings* page will display the following:

<b>Status</b>	Indicates the current status of the mentor meeting: <ul style="list-style-type: none"><li>• <b>Requested:</b> indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this.</li><li>• <b>Completed:</b> indicates that this meeting has been completed. No edits can be made.</li><li>• <b>Cancelled:</b> indicates that this meeting has been cancelled. No edits can be made.</li></ul>
<b>Meeting date</b>	Indicates the date this meeting took place. The mentor will enter a date when completing the meeting. It may be blank if the meeting has not been completed, or if the meeting is older than 2019.
<b>Mentor</b>	This indicates the mentor who completed this meeting.
<b>View</b>	Click on this button to view the details of the meeting.



## Mentor Meeting Details

On the *Mentor Meetings* page, clicking to view a mentor meeting will open it and display the details.

Mentor meeting details are visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Mentor Meetings* page will display the following:

<b>Mentor</b>	This indicates the mentor who completed this meeting.
<b>Meeting Status</b>	Indicates the current status of the mentor meeting: <ul style="list-style-type: none"> <li>• <b>Requested:</b> indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this.</li> <li>• <b>Completed:</b> indicates that this meeting has been completed. No edits can be made.</li> <li>• <b>Cancelled:</b> indicates that this meeting has been cancelled. No edits can be made.</li> </ul>
<b>Meeting date</b>	Indicates the date this meeting took place. The mentor will enter a date when completing the meeting. It may be blank if the meeting has not been completed, or if the meeting is older than 2019.
<b>Meeting Statements</b>	These statements along with the comments, provide a quick overview of what was discussed in the meeting and whether the future CPA is on track with their reporting.
<b>Comments</b>	These comments along with the meeting statements, provide a quick overview of what was discussed in the meeting and whether the future CPA is on track with their reporting.
<b>CANCEL (BUTTON)</b>	If the meeting is in a Requested status, the future CPA and mentor can cancel it to indicate the meeting never took place.

## CPA Reviews

The future CPA's *CPA Reviews* page displays a list of all CPA Reviews.

Future CPAs request a CPA Review of their experience report(s) to get their experience recognized by their provincial/regional CPA body.

During a CPA Review, the self-assessed proficiency and details within each experience report will be assessed to determine whether they have been reported accurately and/or the practical experience requirements have been met.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *CPA Reviews* page will display the following:

<b>Requested</b>	This indicates the date the future CPA originally requested the CPA Review.
<b>Completed</b>	This indicates the date the CPA Review was completed. If it has not yet been completed, this will be blank.
<b>Status</b>	Indicates the current status of the CPA Review: <ul style="list-style-type: none"> <li>• <b>Data Check:</b> The CPA Review requires program manager verification.</li> <li>• <b>Certification Requested:</b> The CPA Review requires program leader certification.</li> <li>• <b>Assessment Requested:</b> The CPA Review is with the provincial/regional CPA body but has yet to be assigned to a CPA Reviewer.</li> <li>• <b>Required:</b> The CPA Review has been assigned to a CPA reviewer.</li> <li>• <b>Follow-up:</b> The CPA reviewer has requested additional information before they can complete the CPA Review. Once changes have been made (and the experience reports are back in verified status), the CPA Review needs to be re-submitted.</li> <li>• <b>Completed:</b> The CPA Review is complete.</li> <li>• <b>Cancelled:</b> The CPA Review has been cancelled.</li> </ul>
<b>View</b>	Click on this button to view the details of the CPA Review. Here a future CPA can view any comments provided and program managers/program leaders can verify/certify the CPA Review.

## CPA Review Details

On the CPA Reviews page, clicking to view a CPA Review will open it and display the details.

CPA Review details are visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The CPA Review will display the following:

<b>Type</b>	<p>There are two types of CPA Reviews:</p> <ul style="list-style-type: none"><li>• <b>Pre-assessment:</b> This is used when a future CPA in EVR needs to have their employment assessed and determined that they are in a qualifying role. (PPRs do not require a pre-assessment).</li><li>• <b>Assessment:</b> Any other time a future CPA requests a CPA Review, this is to have their experience assessed.</li></ul>
<b>Review Reason</b>	<p>There are five reasons why a future CPA would need a CPA Review:</p> <ul style="list-style-type: none"><li>• <b>12-Month Assessment:</b> <b>A requirement for EVR only.</b> After 12 months of experience, the CPA Reviewer will check the future CPA's experience and identify whether they are on-track.</li><li>• <b>Change of Job Assessment:</b> Required for any future CPA changing jobs while reporting practical experience.</li><li>• <b>Completion Assessment:</b> This should only be used if all the PER requirements have been met.</li><li>• <b>Student Requested:</b> Optional. At any time, future CPAs can request a CPA Review to check whether they are on-track (additional details are required to identify why the future CPA is requesting the CPA Review).</li><li>• <b>Profession Requested:</b> The CPA reviewer will have specifically requested for the future CPA to use this reason.</li></ul>

<b>Status</b>	<p>Indicates the current status of the CPA Review:</p> <ul style="list-style-type: none"> <li>• <b>Data Check:</b> The CPA Review requires program manager verification.</li> <li>• <b>Certification Requested:</b> The CPA Review requires program leader certification.</li> <li>• <b>Assessment Requested:</b> The CPA Review is with the provincial/regional CPA body but has yet to be assigned to a CPA Reviewer.</li> <li>• <b>Required:</b> The CPA Review has been assigned to a CPA reviewer.</li> <li>• <b>Follow-up:</b> The CPA reviewer has requested additional information before they can complete the CPA Review. Once changes have been made, the CPA Review needs to be re-submitted.</li> <li>• <b>Completed:</b> The CPA Review is complete.</li> <li>• <b>Cancelled:</b> The CPA Review has been cancelled.</li> </ul>
<b>Date Created</b>	This indicates the date the future CPA originally requested the CPA Review.
<b>Program Manager Comments</b>	This displays any comments provided by the program manager provided during their verification. This will be blank if program manager verification is not required.
<b>Program Leader Comments</b>	This displays any comments provided by the program leader during their certification. This will be blank if program leader certification is not required.
<b>CPA Review Comments</b>	This displays any comments left by the CPA Reviewer.

<b>CPA Administrators Only</b>	<p>This section is for administrative purposes and only displays for future CPAs in <b>PPR</b>. Future CPAs in EVR will not see this section.</p> <ul style="list-style-type: none"><li>• <b>Date/Leave Declaration:</b> Displays whether the program leader has agreed or disagreed to the Future CPAs reported dates (and leave).</li><li>• <b>Mentor Meeting Declaration:</b> Displays whether the program leader has agreed or disagreed to the Future CPA meeting their mentor meeting requirement.</li><li>• <b>All 30 month Declaration:</b> Displays “agree” if the program leader confirms that the Future CPA has spent all 30 months within their program.</li><li>• <b>Not all 30 month Declaration:</b> Displays “agree” if the Future CPA has not completed all 30 months within their program, but the requirements show as met (if the Future CPA was integrated into a program).</li><li>• <b>Departed Declaration:</b> Displays “agree” if the program leader confirms that while the Future CPA has correctly reported and are leaving the program, they have not completed the requirements (if the Future CPA departs a program before completing).</li><li>• <b>Certified By:</b> will display the program leader name.</li></ul>
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