

Self-Assessment User Guide

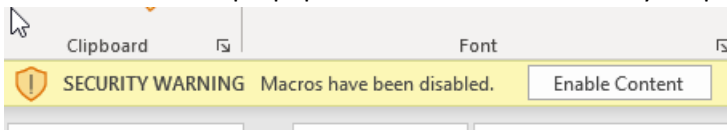
The purpose of the self-assessment tool is to provide applicants the ability to self-assess their prior academic knowledge for admission to CPA PEP. It is intended for applicants who have completed courses (in or outside of Canada) that are not pre-approved by a regional/provincial CPA body.

The self-assessment provides applicants preliminary assessment results to indicate if they are eligible for a full exemption (course and exam), partial exemption (course only), or no exemption based on the information provided in the tool. The results of the self-assessment are unofficial and intended to provide applicants with information on the potential exemptions they may be eligible for in the transcript/eligibility assessment process. An official transcript/eligibility assessment application is required for applicants who wish to register as a CPA Student and enroll in the CPA Certification Program with a provincial/regional CPA body.

This guide will outline the process for completing the Self-Assessment tool.

Step-by-Step Instructions

1. Upon opening the excel document, ensure that you click to “Enable Macros” – this will allow the excel document to prepopulate fields and streamline your process.



2. Read through the **Applicant Instructions** tab and complete Steps 1 to 7 before proceeding to complete the applicable course worksheets.
3. In step 1, identify the profile that best describes you. More than one profile may be selected.

Step 1: Select Yes/No in the grey boxes to identify the applicant profile that best describes you. More than one profile selection may apply.

<input type="checkbox"/>	I am educated in [region/province] and have completed courses at a post-secondary institution in [region/province]
<input type="checkbox"/>	I am educated in Canada, outside of [region/province] and have completed courses at a post-secondary institution in Canada, outside of [region/province]
<input type="checkbox"/>	I am educated outside of Canada and have completed courses at a post-secondary institution outside of Canada

4. Step 2 – Provide a list of all post-secondary institutions they have attended, along with the program name. This information will be carried forward into the course worksheets to complete the self-assessment. Please ensure to indicate the most relevant Institution first in the list, as this will populate first in the course worksheets.

Step 2: Provide all Post-Secondary Institutions you have attended, along with the Program name (e.g. Bachelor of Commerce).

Post Secondary Institution	Program Name
UofT	BBA
University of Manitoba	Continuing Education

5. Step 3 – Indicate which CPA Preparatory core courses you are seeking an exemption for by selecting yes in the relevant cells. As you select ‘Yes’, you will notice that a new tab becomes visible along the bottom ribbon of your document.

Step 3: Select Yes/No in the grey boxes to indicate to your provincial/regional CPA body which CPA preparatory core courses you are seeking an exemption for by completing this self-assessment tool. A Yes/No is required for each course.

CPA Preparatory Core Courses

Yes	Intermediate Financial Reporting 1 (IF1)
No	Intermediate Financial Reporting 2 (IF2)
No	Advanced Financial Reporting (AFR)
No	Corporate Finance (COF)
No	Audit and Assurance (AUA)
No	Taxation (TAX)
No	Intermediate Management Accounting (MAA)
No	Performance Management (PMA)

Applicant Instructions | **IF1** | Declaration | Result Summary

- Complete the declaration in Step 5 and enter your contact information in Step 6. Please note the disclaimer at the bottom of each page, which indicates the results of this self-assessment are **Unofficial** and an official transcript/eligibility assessment is required in order to verify your results.

Completing the CPA Preparatory Core Course worksheets.

- Select the next tab along the bottom of your workbook to complete each Core course worksheet. In these tabs you will indicate which topics you have covered from the CPA Preparatory guidelines. You will notice information on the core courses and additional links at the top of the page.

CPA Competency Area: **Financial Reporting**

CPA Preparatory Course Name: **Intermediate Financial Reporting 1**

Course Code: IF1

Course Type: Core Course

Course Prerequisites: Introductory Financial Accounting, Introductory Management Accounting
 Course Description: Intermediate Financial Reporting 1 is an instructor-facilitated core course that builds on the skills learned in Introductory Financial Accounting, focusing primarily on the assets side of the statement of financial position, including: cash, receivables, inventories, capital assets, intangible assets, investments

Additional Course Information:

[Intermediate Financial Reporting 1 Course Overview](#)

[CPA Preparatory Course Syllabus](#)

[Intermediate Financial Reporting 1 Course Primer](#)

[CPA Preparatory Course Exam Blueprint](#)

- To complete each tab, fill out the white boxes in the main table. For each topic you will be able to indicate that you haven't covered the topic, that you have covered the topic within one course of study or that you have covered the course in two or more courses. As you select "Yes", other sections of this row will turn white, and the *Institution Name* and *Degree Program* will populate with you the first PSI name and Program you entered on the instructions page.

Course Topic	Have you covered the topic?	Institution Name(s) as shown on Official Transcript	Degree Program Name(s)	Course Number(s)/Code(s) and Course Name(s) as shown on Institution's Official Transcript	Year Completed	Type of Additional Documentation Provided	Additional Information or Comments
1.0 Accounting Standards in Canada 1.1 Generally Accepted Accounting Principles 1.2 International Financial Reporting Standards (IFRS) Framework 1.3 The Accounting Standards for Private Enterprises (ASPE) Framework	Yes - two or more courses	UofT	BBA			No Documentation Available	

- If the topic was studied at a different Institution as part of a different program, you can click into the cell and press the 'delete' button to erase the contents of the cell. Then you can select a different institution/program from the drop-down box.
- If the topic was studied at more than one institution in more than one program, then you can add additional contents to each cell. Simply select the additional institutions and programs from the drop-down box and they will be added to the cell. If at any point you make a mistake you can press the 'delete' button to empty the cell.

Course Topic	Have you covered the topic?	Institution Name(s) as shown on Official Transcript	Degree Program Name(s)	Course Number(s)/Code(s) and Course Name(s) as shown on Institution's Official Transcript	Year Completed	Type of Additional Documentation Provided	Additional Information or Comments
1.0 Accounting Standards in Canada 1.1 Generally Accepted Accounting Principles 1.2 International Financial Reporting Standards (IFRS) Framework 1.3 The Accounting Standards for Private Enterprises (ASPE) Framework	Yes - two or more courses	University of Manitoba UofT	BBA Continuing Education			No Documentation Available	

- Enter the course number, year completed and the type of additional documentation you are providing. *Please note, to be considered for a full exemption, you will need to provide Course Syllabi for every course you would like assessed.*
- Continue this process for each topic of the course and below the table you will receive one of 3 Preliminary Assessment results:
No Exemption – this indicates that based on the information you have provided, you will not be eligible to receive an exemption for the course. Your next step would be to submit a transcript/eligibility assessment application to register in CPA Preparatory courses.
Partial Exemption – this result indicates you may be eligible for an exemption from the course and eligible to sit a challenge examination.
Full Exemption – This result indicates you may be eligible for an exemption from both the course and the examination.

Please remember, at this point your results are **unofficial** and subject to a transcript/eligibility assessment, after which you will receive official results.

- Once you have completed these steps for each course you are seeking an exemption from, you can check your results in the **Results Summary** tab. This tab will give an overview of your unofficial results.

Preliminary Results Summary

Please be aware, the results of this self-assessment are unofficial and intended to provide you with information on the potential exemptions you may be eligible for in the transcript/eligibility assessment process. An official transcript/eligibility assessment application is required to register as a CPA Student and enroll in the CPA Certification Program with your provincial/regional CPA body.

Module	Preliminary/Unofficial Results	Reviewer Decision
Intermediate Financial Reporting 1 (IF1)	Full exemption (course and exam)	Further Review Required
Intermediate Financial Reporting 2 (IF2)	Partial exemption (course only)	Further Review Required
Advanced Financial Reporting (AFR)	Not Assessed	Not Assessed
Corporate Finance (COF)	Not Assessed	Not Assessed
Audit and Assurance (AUA)	No exemption	Further Review Required
Taxation (TAX)	Not Assessed	Not Assessed
Intermediate Management Accounting (MAA)	Not Assessed	Not Assessed
Performance Management (PMA)	Not Assessed	Not Assessed

- Finally, select the **Declaration** tab and sign and date the declaration. Ensure you have checked the document carefully; once you click ‘Complete Form’, the file will save with a new name and you will not be able to edit the document further. Additionally, if you leave the signature or date blank, the button will not work.
- Once you have checked the document, press ‘Complete Form’. This will rename the Excel file, open a save dialog box so you can choose where to save the file, close the Excel document and password-protect the document. Please do not change the name of the file, as it may not be accepted by our servers.
- Return this completed document along with all additional documentation to your regional/provincial CPA body as part of your Transcript/eligibility assessment submission. Once they have reviewed your assessment, you will receive your **Official** Assessment results