CHARTERED PROFESSIONAL ACCOUNTANTS

PERT Guide for CPA Mentors

Effective September 1, 2020

CPA provincial/ regional bodies	CPA PER contact information
CPA Alberta	Email: practicalexperience@cpaalberta.ca Phone: 403.269.5341
CPA Atlantic Region	Email: practicalexperience@cpaatlantic.ca Phone: 902.429.4494
CPA British Columbia	Email: cpabcper@bccpa.ca Phone: 604.872.7222
CPA Canada — International	Email: ryim@cpacanada.ca Phone: 604.605.5084
CPA Manitoba	Email: practicalexperience@cpamb.ca Phone: 204.943.1538
CPA Ontario	Email: practicalexperience@cpaontario.ca Phone: 416.962.1841 or 1.800.387.0735 Mentor inquiries: mentor@cpaontario.ca
Ordre des comptables professionnels agréés du Québec	Email : Stages@cpaquebec.ca Phone: 1.800.363.4688 [2615]
CPA Saskatchewan	Email: practicalexperience@cpask.ca Phone: 306.359.0272
CPA Canada Toronto Head Office	Email: member.services@cpacanada.ca Phone: 416.977.0748 or 1.800.268.3793

Table of Contents

1 Overview

The CPA Certification Program

To complete the CPA Certification Program, future CPAs must satisfy three components[1]:

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

This document will provide guidance and assistance for CPA mentors as they support future CPAs in PERT.

Future CPAs reporting from Quebec will need to visit Ordre Des Comptables Professionnels Agréés Du Quebec for their information.

CPA Practical Experience Requirements (CPA PER)

The CPA PER comprises the following elements:

1. Qualifying Experience: Future CPAs gain relevant paid employment that is progressively complex
2. Appropriate Supervision: Supervisors, mentors, program managers and program leaders will provide support to future CPAs throughout their practical experience
3. Reporting and Self-Assessment: Future CPAs report work experience and self-assess on their progress
4. CPA Mentorship: Future CPAs must 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.

1 Please refer to your provincial/regional CPA body for 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”.

2 Experience Routes

There are two experience routes a future CPA can follow to report their experience:

Pre-Approved Program Route (PPR)

Employers offering pre-approved programs have worked with their respective provincial/regional CPA bodies to design a program ensuring that the required experience can be met within 30 months.

In this route, the employer must provide a pre-approved program manager, pre-approved program leader and mentor to support the future CPAs in the program. If your employer has asked you to mentor a future CPA within the program, ensure you declare that you are mentoring within a pre-approved program on the registration form (or update your profile to reflect it).

Experience Verification Route (EVR)

This flexible self-directed route allows future CPAs to gain practical experience from an employer of their choice. They must still be employed in a qualifying role, which is determined through a pre-assessment. There are more touchpoints throughout the journey and more guidance from a mentor is often needed as compared to a pre-approved program.

An employer can have future CPAs in both routes working for them, but only those in the PPR will follow the specific program laid out for them. EVRs can be mentored by any CPA in good standing.

Unemployed

If a future CPA is unemployed (or not employed in a relevant role), their experience route will be reflected as “Unemployed”. A future CPA does not gain recognition toward gaining their practical experience competencies while they are unemployed.

Future CPAs 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.

3 The Practical Experience Reporting Tool (PERT)

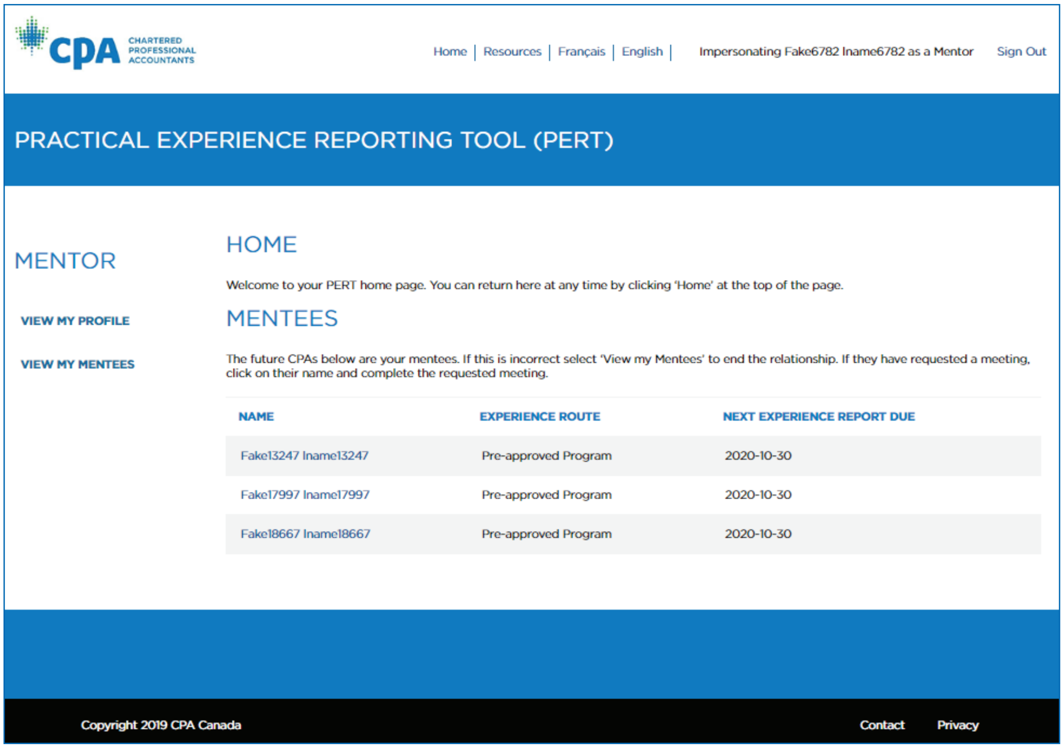
All future CPAs (excluding those in Quebec) are required to document their practical experience development in the Practical Experience Reporting Tool (PERT). This allows the CPA profession to track their progress and assess whether they have met the CPA Practical Experience Requirements (CPA PER).

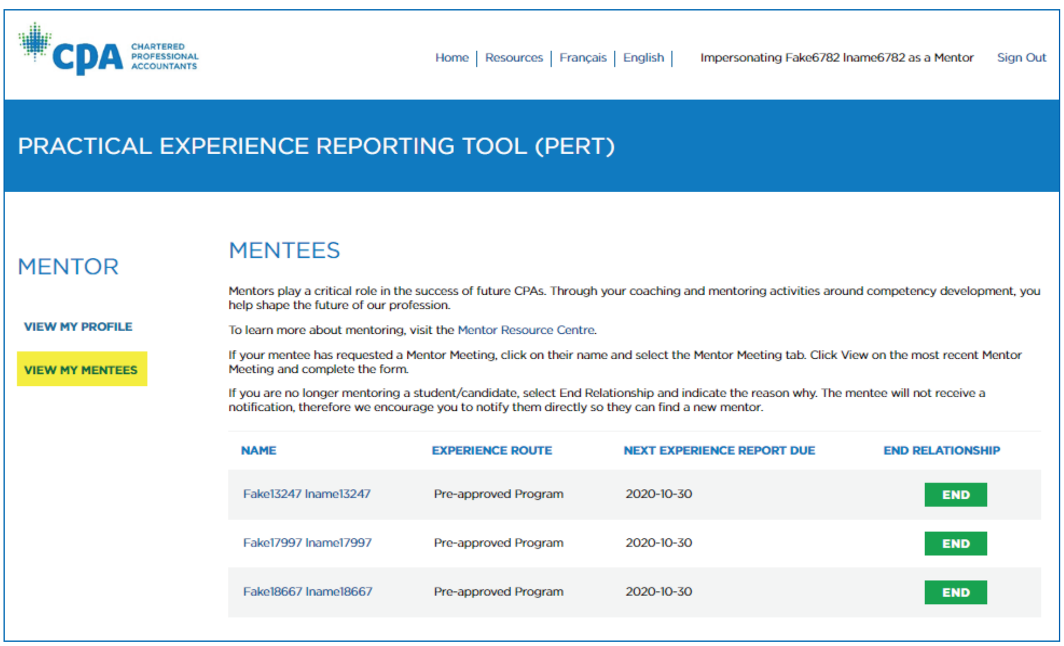
This guide provides guidance on individuals who support future CPAs in PERT as their mentor. If you also support future CPAs as a program manager or program leader, refer to the *PERT Guide for Program Manager and Program Leaders*.

As a mentor, you are responsible for:

- meeting with your mentee at least semi-annually;
- documenting these meetings in PERT; and
- documenting any unresolved concerns in PERT.

Once you have logged into PERT, you will arrive on your *Home page*. Here you can see a list of your mentees and any other pending items if you support future CPAs through another role.





You will be able to see the following:

- Your Mentee's name
- Their Experience Route
- Their Next Experience Report Due date
- The End Relationship button

Next Experience Report Due Date

This date triggers a reminder for your mentee to update their experience reports in PERT.

After they update their experience report, they will be prompted to request a meeting with you to discuss their experience.

End Relationship

It is normal for CPA mentoring relationships to end. The main reasons are:

- Relationship is not working
- Student/candidate has left the organization
- Mentor has left the organization
- A new mentor has been assigned

If you would like to remove your mentees details from your profile, click **End Relationship** and identify the reason the relationship is ending (your mentee will not see the reason).

If your mentee ends the relationship, you will be notified by email.

4 Mentor Meetings

Future CPAs are required to report mentor meetings semi-annually. Failure to do so will result in 30-day duration penalty for every missed meeting.

Mentor meetings are an opportunity for your mentee to discuss their development with you. They should schedule a meeting each time they update their experience report. Through PERT, they will send you a meeting request, but it is **not** a calendar invitation. They must contact you directly to schedule a date.

Mentor meetings can take place in person or virtually and must be a free-flow conversation.

Preparation for the meeting

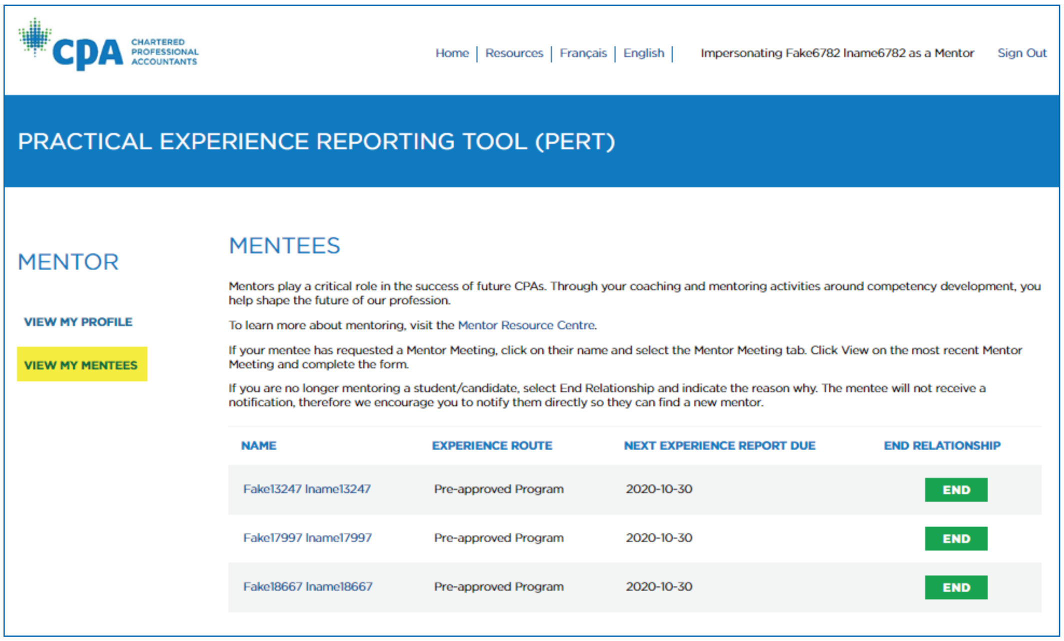
Once they have requested a meeting through PERT (and set up a time and place that works for you), your mentee should prepare for the meeting by gathering all their information, examples and questions they might have for you.

During this meeting, you are expected to help your mentee reflect on their competencies and discuss whether their self-assessment accurately reflects their experience. Therefore, it is recommended that you familiarize yourself with their experience report before the meeting.

Viewing their report(s)

1. From your *Home page,* or your Mentees page in PERT, click on your mentee's name.

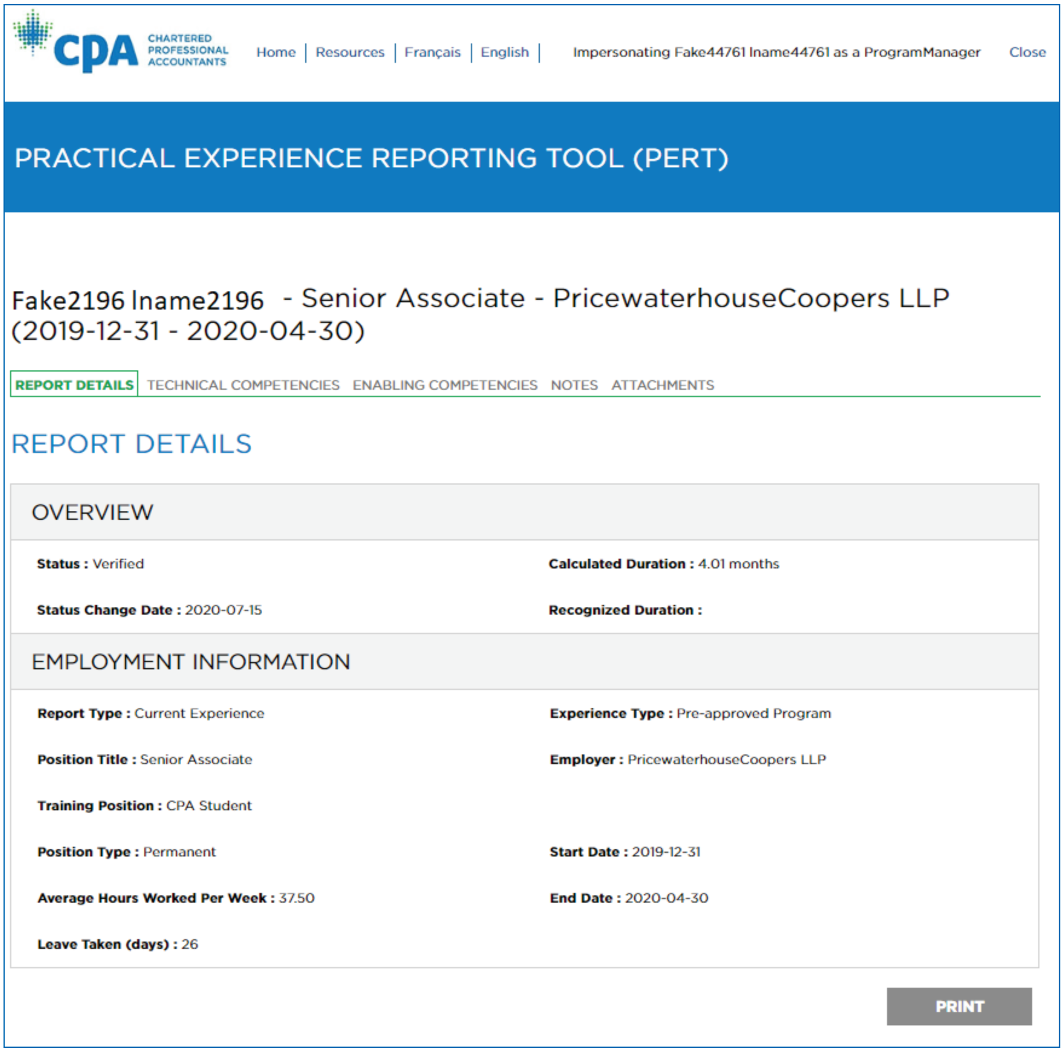
This will take you to their *Home* page where you can view a snapshot of their progress (outstanding action items, eligible duration, competency progress).



2. To view their experience report, click on the *Experience Reports* page.

Here you can see a list of their experience reports. It is likely that you will be focusing on the most recent report, but your mentee may indicate that they wish to discuss a prior experience report, or even all of them.

3. Click **VIEW** to access the experience report.



CHARTERED PROFESSIONAL ACCOUNTANTS

Home | Resources | Français | English | Impersonating Fake44761 lname44761 as a ProgramManager Close

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

Fake2196 lname2196 - Senior Associate - PricewaterhouseCoopers LLP (2019-12-31 - 2020-04-30)

REPORT DETAILS TECHNICAL COMPETENCIES ENABLING COMPETENCIES NOTES ATTACHMENTS

REPORT DETAILS

OVERVIEW

Status : Verified

Calculated Duration : 4.01 months

Status Change Date : 2020-07-15

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Experience Type : Pre-approved Program

Position Title : Senior Associate

Employer : PricewaterhouseCoopers LLP

Training Position : CPA Student

Position Type : Permanent

Start Date : 2019-12-31

Average Hours Worked Per Week : 37.50

End Date : 2020-04-30

Leave Taken (days) : 26

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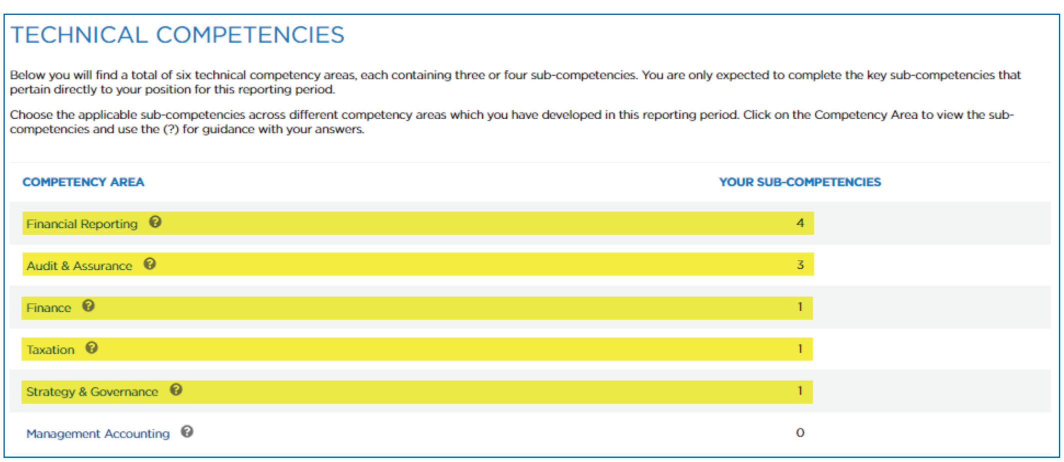
Once you have opened an experience report, navigate through their details, technical and enabling competencies by clicking the tabs at the top.

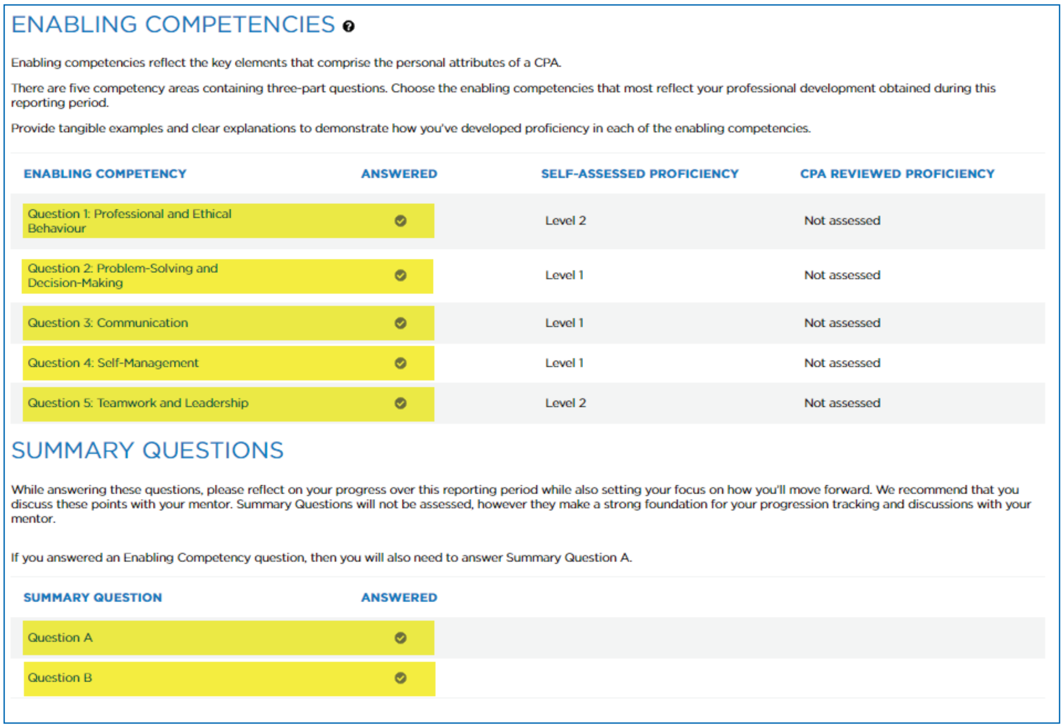


TECHNICAL COMPETENCIES

Below you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the key sub-competencies that pertain directly to your position for this reporting period.

Choose the applicable sub-competencies across different competency areas which you have developed in this reporting period. Click on the Competency Area to view the sub-competencies and use the (?) for guidance with your answers.

COMPETENCY AREA	YOUR SUB-COMPETENCIES
Financial Reporting	4
Audit & Assurance	3
Finance	1
Taxation	1
Strategy & Governance	1
Management Accounting	0



ENABLING COMPETENCIES

Enabling competencies reflect the key elements that comprise the personal attributes of a CPA.

There are five competency areas containing three-part questions. Choose the enabling competencies that most reflect your professional development obtained during this reporting period.

Provide tangible examples and clear explanations to demonstrate how you've developed proficiency in each of the enabling competencies.

ENABLING COMPETENCY	ANSWERED	SELF-ASSESSED PROFICIENCY	CPA REVIEWED PROFICIENCY
Question 1: Professional and Ethical Behaviour	✔	Level 2	Not assessed
Question 2: Problem-Solving and Decision-Making	✔	Level 1	Not assessed
Question 3: Communication	✔	Level 1	Not assessed
Question 4: Self-Management	✔	Level 1	Not assessed
Question 5: Teamwork and Leadership	✔	Level 2	Not assessed

SUMMARY QUESTIONS

While answering these questions, please reflect on your progress over this reporting period while also setting your focus on how you'll move forward. We recommend that you discuss these points with your mentor. Summary Questions will not be assessed, however they make a strong foundation for your progression tracking and discussions with your mentor.

If you answered an Enabling Competency question, then you will also need to answer Summary Question A.

SUMMARY QUESTION	ANSWERED
Question A	✔
Question B	✔

To view specific technical or enabling answers, you will need to select the competency where an answer has been given.

You are not expected to verify the factual accuracy on your mentee's experience reports (their supervisor or program leader does this).

Note: For PPR, your mentee will have pre-populated position duties. They only need to provide a self-assessed proficiency level.

To see additional information on their experience reports, refer to the appendix.

During the meeting

During the meeting, help your mentee reflect on their competencies, share your own experiences, discuss whether their self-assessments accurately reflect their experience and help them set goals.

For technical competencies, help them determine whether they have self-assessed to a level that is reasonable (e.g. have they self-assessed too high? Or to low?) and (for EVR) that their job duties description also matches the level (e.g. have they described their level of autonomy, circumstance, etc.).

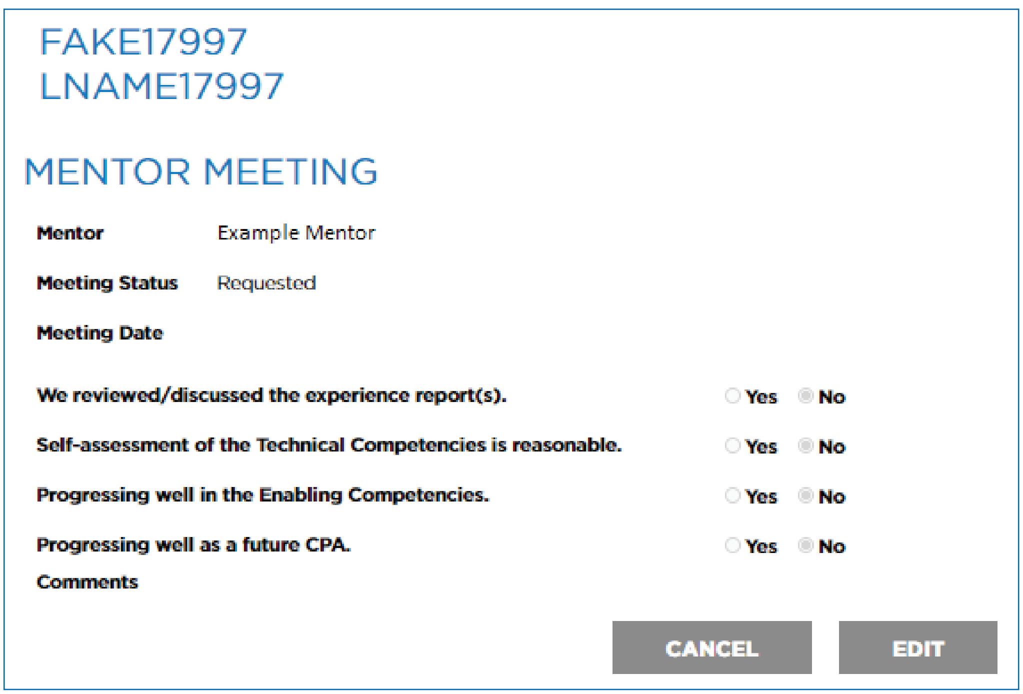
For enabling competencies, help them reflect on their experience and answer any questions around their development.

After the meeting

After the meeting, you are required to log in to PERT and document the meeting. This should be done within one week of your meeting.

1. From your mentee's PERT record, click on the *Mentor Meetings* page.

2. Click **VIEW** to access the requested mentor meeting.



3. Click **EDIT** to revise the mentor meeting.
   a) Enter the date you met with your mentee.
   b) Answer the questions.
   c) Provide your comments (click on the (?) for ideas on what information to include)
   d) Click **COMPLETE**.

Thank you for your support of our future CPAs as they journey to become a CPA member. If you have any questions, please contact your provincial/regional CPA body.

5 PER 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*.

Volunteer:
Experience where there is no financial gain for the individual.

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’

Mentor’s Profile

The profile contains your personal information and mentorship preferences if you are an approved mentor. Only mentors can view their profile, although some of the information is displayed in other areas.

Your *Profile* page will display the following:

I am mentoring within a Pre-approved Program	This box will need to be checked if you are mentor to a future CPA in a Pre-Approved Program.
Pre-approved Program Organization	The organization that you are employed with.
I want to be added to the Mentor Match Portal	If you have selected **Yes**, your name, industry, and biography will be visible in the Mentor Match Portal for future CPAs seeking a mentor.
I would accept international mentees	Checking this box indicates that you are willing to mentor a future CPA who is working outside of Canada in an international capacity.
Maximum Mentees	The maximum number of mentees you are willing to mentor at any one time.
Language Spoken	The language(s) you speak.
Language Preference	Your preferred language of communication (English or Français).
Biography	If you agreed to be added to the Mentor Match Portal, your biography (bio) will be displayed in the portal.
Industry	If you agreed to be added to the Mentor Match Portal, the industry you selected will be displayed in the portal.
First Name	Your first name.
Last Name	Your last name.
Email	The email that the provincial/regional CPA body will use to contact you.

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:

Reporting Status	Indicates the future CPA's current status in fulfilling the practical experience requirements. • **Pre-assessment Required**: Current employment has not yet been approved for reporting. • **Pending Enrolment**: Currently awaiting employment confirmation from their program manager. • **In Progress**: Qualifying employment has been approved. Experience reporting can begin if a mentor's name has been included in the profile. • **Unemployed**: Currently unemployed or not employed in a qualifying role. • **PER Standard Met**: Future CPA has met all the practical experience requirements.
PER Start Date	The date set once the future CPA is approved for reporting and have added their mentor. Once this date is set, reporting can begin.
Program	The pre-approved program in which the future CPA is enrolled. This is only visible if their Experience Route is PPR.
Experience Route	This is the "route" the future CPA is reporting experience through. • **Pre-Approved Program Route (PPR)**: Working within a pre-approved program where the employer ensures exposure to all the required experience. • **Experience Verification Route (EVR)**: Not employed in a pre-approved program, this self-directed, flexible route has more touchpoints. • **Unemployed**: Unemployed, or not employed in a qualifying role.
Next Experience Report Date	The date displayed triggers a notification reminder for the future CPA to document their experience. Once they have completed their first report, they will be prompted to enter a preferred date for their next reminder. **Note**: future CPAs are required to report experience semi-annually.
Mentor	The CPA who is supporting the future CPA throughout their practical experience. A mentor is required before the future CPA can get a PER Start date.

Next CPA Review	Either displays a specific date or “Upon Completion”. • **Date** displays the next scheduled date experience reports are required to be sent to the provincial/regional CPA body for CPA Review. • **Upon Completion** means a CPA Review is only required when Core/Breadth/Depth, Enabling and Duration are all reported as “Met”. A CPA Review is also required if the future CPA changes jobs.
Action Item	Displays any upcoming or outstanding items that a future CPA is required to complete as part of the practical experience reporting process. Penalties may apply if items are not completed.
Overview	Shows a brief snapshot of how much progress the future CPA has made toward meeting the practical experience requirements.
Duration Requirements	This is a calculation of all qualifying duration reported and eligible to be recognized.
Competency Requirements	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”.

Mentor, Program Manager or Program Leader Home

This page will display any pending items and a list of your mentees.

This page is only visible to mentors, program managers and program leaders and only displays the section for the role you have.

The mentor, program manager and program leader Home page will display the following:

Program Leader	Displays in the menu if you are a program leader. • **Complete My Declarations**: Displays future CPAs who have requested a CPA Review and requires you to complete your declaration. • **Export Program Reports**: Access reports of the future CPAs within your program: — Students/candidates in your pre-approved program — Students/candidates not in compliance
Program Leader Declaration(s)	Displays if you are a program leader and one of the future CPAs in the program has requested a CPA Review and requires you to complete your declaration. • **Name**: Displays the name of the future CPA. • **Program**: Displays the program the future CPA is enrolled in. • **Provincial/Regional Body**: Displays the provincial/regional CPA body the future CPA is registered with.

Program Manager	Displays in the menu if you are a program manager. • **Manage My Programs**: Here you can view all future CPAs enrolled in your program. • **Complete My Verifications**: Displays future CPAs who have requested a CPA Review and requires you to complete your verification before it is forwarded on to the program leader. • **Export Program Report**s: Access reports of the future CPAs within your program: — Students/candidates in your pre-approved program — Students/candidates not in compliance — Pending Program Leader Declarations
Employment Confirmation(s)	Displays if you are a program manager and a future CPA has indicated that they are employed in your program, but you have not yet confirmed it. • **Name**: Displays the name of the future CPA. • **Start Date**: Displays the date the future CPA indicated as their start date of the program. • **Mentor**: displays the name of the mentor the future CPA indicated in their profile. • **Provincial/Regional Body**: Displays the provincial/regional CPA body the future CPA is registered with.
Pending Verification(s)	Displays if you are a program manager and one of the future CPAs within the program has requested a CPA Review which requires the program manager verification before it is forwarded on to the program leader. • **Name**: Displays the name of the future CPA. • **Program**: Displays the program the future CPA is enrolled in. • **Provincial/Regional Body**: Displays the provincial/regional CPA body the future CPA is registered with.
Mentor	Displays if you are a mentor. • **View My Profile**: View and edit your mentor profile. • **View My Mentees**: View and manage your mentees.
Mentees	Displays if you are a mentor and have active mentees. • **Name**: Displays the name of your mentee. • **Experience Route**: This is the “route” your mentee is reporting experience through. — **Pre-Approved Program Route (PPR)**: Working within a pre-approved program where the employer ensures exposure to all the required experience. — **Experience Verification Route (EVR)**: Not employed in a pre-approved program, this self-guided, flexible route has more touchpoints. — **Unemployed**: Unemployed, or not employed in a qualifying role. • **Next Experience Report Due**: The date displayed triggers a notification reminder for your mentee to document their experience. Once they have completed their first report, they will be prompted to enter a preferred date for their next reminder. **Note**: future CPAs are required to report experience semi-annually.

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:

Report Status	Indicates the current status of the experience report. • **New**: Future CPA has created the report but has not completed it. • **Complete**: Future CPA has completed their report and is ready to discuss with their mentor and/or have the report verified. • **Follow-up**: Indicates that an update/correction needs to be made. • **Verification Requested**: The report has been sent to the supervisor to verify the factual accuracy of the experience reported." • **Admin Assess**: An exception has occurred. The PERT administrator will assess it to determine what is needed. • **Verified**: The report has been verified and is ready to be sent for CPA Review if due. • **Reviewed**: The CPA reviewer has reviewed this report. It cannot be edited any further.
Report Type	Indicates what type of experience is being reported: • **Current Experience**: Experience obtained after the PER Start Date. • **Prior EV**: Experience obtained before the PER Start Date gained in the Experience Verification Route. • **Prior PPR**: Experience obtained before the PER Start Date gained in the pre-approved program route. • **Catch up**: An exception report should be used only if instructed to by the provincial/regional CPA body.
Report Period	This indicates the time period this report covers. Experience reported in this report should have been obtained during this report period. The report period calculates towards the duration requirement.
Employer	Displays the employer of the future CPA from the report period.
Position	Displays the position (job title) of the future CPA from the report period.
View	Click on this button to view the experience reported.

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:

Report Details	Contains the overall details of the experience report (for example, the employment information and supervisor information). On this page, a future CPA can: • **Edit**: if the experience report is in a new, follow-up or complete status. • **Delete**: if the experience report is in a new, follow-up or complete status. • **Complete**: if the experience report is in a new or follow-up status. • **Send to supervisor**: if the experience report is for EVR and in a complete status. • **Cancel sent to supervisor**: if the experience report is in a verification requested status. • **Verify**: if the experience report is for PPR and in a complete status. • **Copy**: if the experience report is in verified or reviewed status. • Re-open: if the experience report is in verified status All PERT users can **print** any experience report. Using this function will display all sections of the report on one page.
Technical Competencies	Contains a list of each technical competency. • **Competency Area**: Clicking on each competency area will direct you to the sub-competency details for that competency area. • **Your Sub-Competencies**: Indicates which sub-competencies have been reported and/or verified (if required). 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. 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.

Enabling Competencies	Contains a list of each enabling competency. • **Enabling competency**: Clicking on each question will direct you to the details for that question. • **Answered**: Indicates which questions have been answered. • **Self-assessed proficiency**: displays the self-assessed proficiency if the future CPA has entered one. • **CPA reviewed proficiency**: displays the CPA reviewed proficiency if the report has been reviewed. The CPA reviewed proficiency overrides the self-assessed proficiency. Summary Questions are also required if any enabling competency question has been answered. • **Summary question**: Clicking on each question will direct you to the details for that question. • **Answered**: Indicates which questions have been answered. Clicking on each question is how the future CPA answers them. Supporters can also click into each question and view the reported experience. Note: the (?) contains supporting information to help the future CPA answer the enabling competency questions
Notes	Here you can view any Notes that have been entered.
Attachments	Here you can view 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:

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

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:

Status	Indicates the current status of the mentor meeting: • **Requested**: indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this. • **Completed**: indicates that this meeting has been completed. No edits can be made. • **Cancelled**: indicates that this meeting has been cancelled. No edits can be made.
Meeting date	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.
Mentor	This indicates the mentor who completed this meeting.
View	Click on this button to view the details of the meeting and and/or complete it if necessary.

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:

Mentor	This indicates the mentor who completed this meeting.
Meeting Status	Indicates the current status of the mentor meeting: • **Requested**: indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this. • **Completed**: indicates that this meeting has been completed. No edits can be made. • **Cancelled**: indicates that this meeting has been cancelled. No edits can be made.
Meeting Date	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.
Meeting Statements	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.
Comments	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.
CANCEL (BUTTON)	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:

Requested	This indicates the date the future CPA originally requested the CPA Review.
Completed	This indicates the date the CPA Review was completed. If it has not yet been completed, this will be blank.
Status	Indicates the current status of the CPA Review: • **Data Check**: The CPA Review requires program manager verification.. • **Certification Requested**: The CPA Review requires program leader certification. • **Assessment Requested**: The CPA Review is with the provincial/regional CPA body but has yet to be assigned to a CPA Reviewer. • **Required**: The CPA Review has been assigned to a CPA reviewer. • **Follow-up**: 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. • **Completed**: The CPA Review is complete. • **Cancelled**: The CPA Review has been cancelled.
View	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:

Type	There are two types of CPA Reviews: • **Pre-assessment:** 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). • **Assessment**: Any other time a future CPA requests a CPA Review, this is to have their experience assessed.
Review Reason	There are five reasons why a future CPA would need a CPA Review: • **12-Month Assessment**: A requirement for EVR only. After 12 months of experience, the CPA Reviewer will check the future CPA's experience and identify whether they are on-track. • **Change of Job Assessment**: Required for any future CPA changing jobs while reporting practical experience. • **Completion Assessment**: This should only be used if all the PER requirements have been met. • **Student Requested**: 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). • **Profession Requested**: The CPA reviewer will have specifically requested for the future CPA to use this reason.
Status	Indicates the current status of the CPA Review: • **Data Check**: The CPA Review requires program manager verification. • **Certification Requested**: The CPA Review requires program leader certification. • **Assessment Requested**: The CPA Review is with the provincial/regional CPA body but has yet to be assigned to a CPA Reviewer. • **Required**: The CPA Review has been assigned to a CPA Reviewer. • **Follow-up**: 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. • **Completed**: The CPA Review is complete. • **Cancelled**: The CPA Review has been cancelled.
Date Created	This indicates the date the future CPA originally requested the CPA Review.
Program Manager Comments	This displays any comments provided by the program manager provided during their verification. This will be blank if program manager verification is not required.

Program Leader Comments	This displays any comments provided by the program leader provided during their certification. This will be blank if program manager leader is not required
CPA Review Comments	This displays any comments the CPA reviewer provided. This will be blank if the CPA Review has not been completed.
CPA Administrators Only	This section is for administrative purposes and only displays for future CPAs in PPR. Future CPAs in EVR will not see this section. • **Date/Leave Declaration**: Displays whether the program leader has agreed or disagreed to the Date/Leave Declaration. • **Mentor Meeting Declaration**: Displays whether the program leader has agreed or disagreed to the Mentor Meeting Declaration. • **All 30-Month Declaration**: Displays whether the program leader has agreed or disagreed to the All 30-Month Declaration. • **Not all 30-Month Declaration**: Displays whether the program leader has agreed or disagreed to the Not all 30-Month Declaration. • **Departed Declaration**: Displays whether the program leader has agreed or disagreed to the Departed Declaration. • **Certified by**: Displays the name of the program leader who completed the certification.

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