



## Instructions for Completing Annual CPD Audit on My Portal

1. Log in to [My Portal](#) with your CPA Ontario ID and password. Please use Google Chrome to access the portal.

A screenshot of the CPA Ontario login page. At the top is a dark blue header with the CPA Ontario logo and the text "CPA ONTARIO LOGIN" in white. Below the header, on the left, is a light gray box containing text about the online experience and account creation. On the right is a white login box with a green border. Inside this box are two input fields: "CPA Ontario ID" and "Password". Below these fields is a green "LOGIN" button. At the bottom of the login box are links for "Forgot CPA Ontario ID" and "Reset Password", and a security warning: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!".

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 the latest version of Microsoft Edge, Google Chrome or Mozilla Firefox. Pages may display incorrectly on mobile devices or in Internet Explorer.

**CPA Ontario ID**

**Password**


**LOGIN**

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


For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!



2. Select Obligations and Requests and click **VIEW ALL** under **AUDITS**.



MY PORTAL   PROFILE   SUPPORT   EVENTS



CPA, CA  
CPA Ontario ID: [REDACTED]  
Status: [REDACTED]  
PAL Licence: [REDACTED]

OBLIGATIONS AND REQUESTS


ANNUAL OBLIGATIONS

APPLICATIONS

MEMBER REQUESTS


AUDITS

FINANCIAL HISTORY

 ANNUAL OBLIGATIONS


Fulfill your member and firm annual obligations and view the status of your existing ones.

VIEW ALL

 APPLICATIONS


Start and view the status of applications relating to public accounting, firm registration, member reinstatement and readmission.

VIEW ALL

 MEMBER REQUESTS

Submit and view the status of member requests including public accounting exam eligibility.

VIEW ALL

 AUDITS

If required, complete your audit requirements.

VIEW ALL

2



3. Click **VIEW** on the **CPD ANNUAL COMPLIANCE AUDIT (2022)** tile.

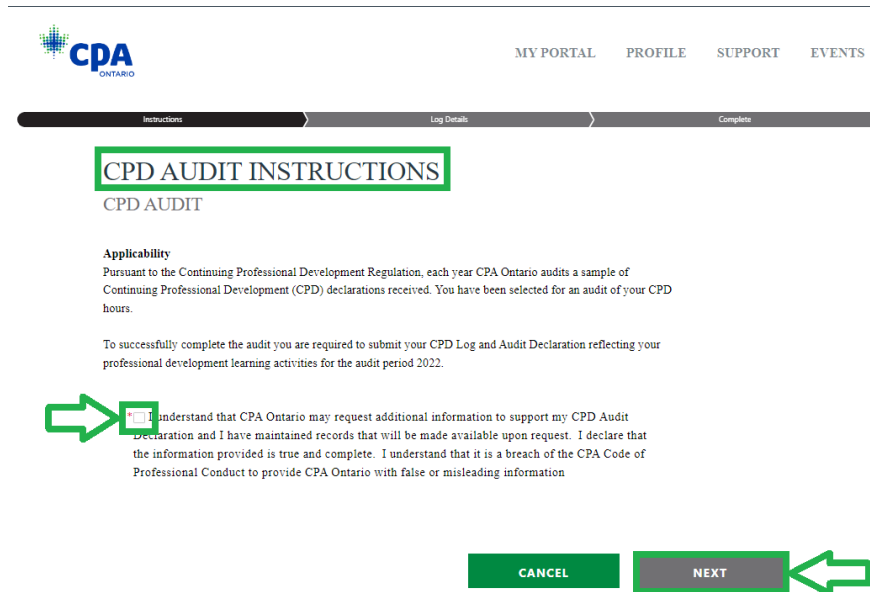
CPD ANNUAL COMPLIANCE  
AUDIT  
**OPEN**  
2022


Enter CPD Courses / Activities

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**VIEW**

4. Review the instructions and attestation, check the attestation box and click **NEXT** to proceed.



 MY PORTAL PROFILE SUPPORT EVENTS

Instructions Log Details Complete

### CPD AUDIT INSTRUCTIONS

CPD AUDIT

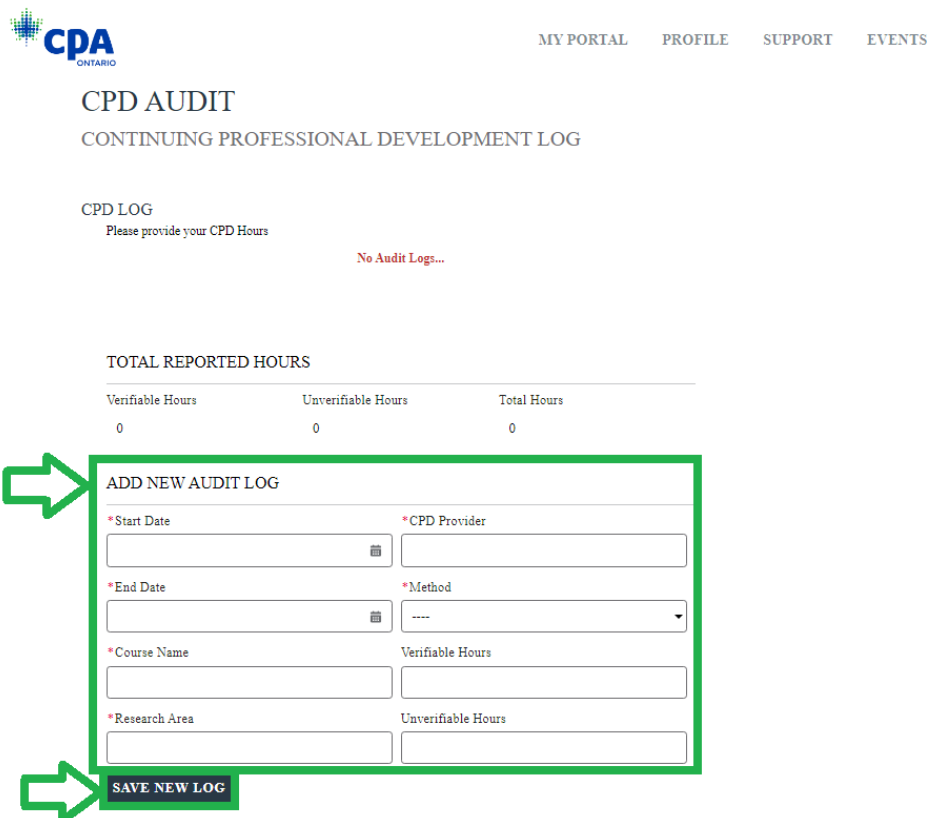
**Applicability**  
Pursuant to the Continuing Professional Development Regulation, each year CPA Ontario audits a sample of Continuing Professional Development (CPD) declarations received. You have been selected for an audit of your CPD hours.

To successfully complete the audit you are required to submit your CPD Log and Audit Declaration reflecting your professional development learning activities for the audit period 2022.

☒ I understand that CPA Ontario may request additional information to support my CPD Audit Declaration and I have maintained records that will be made available upon request. I declare that the information provided is true and complete. I understand that it is a breach of the CPA Code of Professional Conduct to provide CPA Ontario with false or misleading information

CANCEL NEXT

5. Save each course individually as a new audit log by clicking **SAVE NEW LOG** after each entry.



CPA ONTARIO

MY PORTAL PROFILE SUPPORT EVENTS

## CPD AUDIT

### CONTINUING PROFESSIONAL DEVELOPMENT LOG

CPD LOG

Please provide your CPD Hours

No Audit Logs...

TOTAL REPORTED HOURS		
Verifiable Hours	Unverifiable Hours	Total Hours
0	0	0

**ADD NEW AUDIT LOG**

\* Start Date

\* End Date

\* Course Name

\* Research Area

\* CPD Provider

\* Method

Verifiable Hours

Unverifiable Hours

**SAVE NEW LOG**

Note:

- To enter a new CPD course, click **SAVE NEW LOG** and a new blank audit log will appear for you to fill in
- If all necessary information is not submitted, you will receive an error message. Please ensure you are prepared to provide all necessary information to complete the audit.

ERROR

The title(s) for 'Course Name' or 'Research Area' field(s) entered is not specific. Please provide the complete title(s).

OK

- Ensure the dates selected are for the correct year or you will receive an error message

ERROR

The Course/Activity date entered is not in line with the Audit reporting period. Please review the date of the Course/Activity entered or enter a different Course/Activity within the audit period

OK

- The below dropdown menu will appear under “Method”. All items surrounded in green on the below list are “verifiable methods”, and all not in green are “unverifiable methods”.

Course/Conference/Seminars/Presentation

Casual reading of professional journals/magazines not part of research

Formal study leading to a degree/diploma

Informal self-study of course materials/electronic media/device

On-the-job training for new software/systems/procedures/techniques/application

Pre-professional re-examination/formal testing

Publication of professional articles/papers/academic work

Research/Projects resulting in presentations/report/documentation

Research/reading professional literature or journals for specific application in professional role

Self-study leading to examination/designation

Speaker in conference/briefing session/discussion group

Teaching a course/PD session in an area relevant to professional role

Participation & Work on technical committees

Employer-Based In-House Training Session

Writing of technical articles/papers/books

Other



6. Once a course has been entered and you have clicked **SAVE NEW LOG** you will still be able to edit the information for each individual course by clicking **EDIT**.






MY PORTAL   PROFILE   SUPPORT   EVENTS

## CPD AUDIT

### CONTINUING PROFESSIONAL DEVELOPMENT LOG

#### CPD LOG

Please provide your CPD Hours

Activity	Start Date	 <b>EDIT</b> <b>X</b>
Corporate Tax - Review of Tax Planning	5-Jul-2022	
CPD Provider	End Date	
CPA Ontario	8-Jul-2022	
Research Area	Verifiable Hours	
Taxation	10	
	Unverifiable Hours	
	0	
	Sum	
	10	





## Acceptable Entry

### ADD NEW AUDIT LOG

* Start Date	* CPD Provider
<input type="text" value="5-Jul-2022"/>	<input type="text" value="CPA Ontario"/>
* End Date	* Method
<input type="text" value="8-Jul-2022"/>	<input type="text" value="Course/Conference/Seminars/Presentation"/>
* Course Name	Verifiable Hours
<input type="text" value="Corporate Tax - Review of Tax Planning"/>	<input type="text" value="10"/>
* Research Area	Unverifiable Hours
<input type="text" value="Taxation"/>	<input type="text" value="0"/>
<input type="button" value="SAVE NEW LOG"/>	

## Invalid Entry

### ADD NEW AUDIT LOG

<b>* Start Date</b>	<b>* CPD Provider</b>
1-Jan-2022	Various
<b>* End Date</b>	<b>* Method</b>
31-Dec-2022	Course/Conference/Seminars/Presentation
<b>* Course Name</b>	<b>Verifiable Hours</b>
Various	20
<b>* Research Area</b>	<b>Unverifiable Hours</b>
Taxation, Accounting, Finance, Ethics	0
<b>SAVE NEW LOG</b>	



7. Once you have finished entering all of your CPD hours, review the declaration section, check the **DECLARATION** box and click **SUBMIT**.

DECLARATION

Pursuant to the Continuing Professional Development Regulation, each year CPA Ontario audits a sample of Continuing Professional Development (CPD) declarations received. You have been selected for an audit of your CPD hours. To successfully complete the audit you are required to submit your CPD Log and Audit Declaration reflecting your professional development learning activities for the specified audit period.

☒

I comply with the Annual CPD Audit requirement. As outlined in the CPA Ontario Continuing Professional Development regulation.

☐

I do not comply with Annual CPD Audit requirement. I understand that filing a false CPD Declaration is contrary to the CPA Code of Professional Conduct and I will be contacted by CPA Ontario.

CANCEL

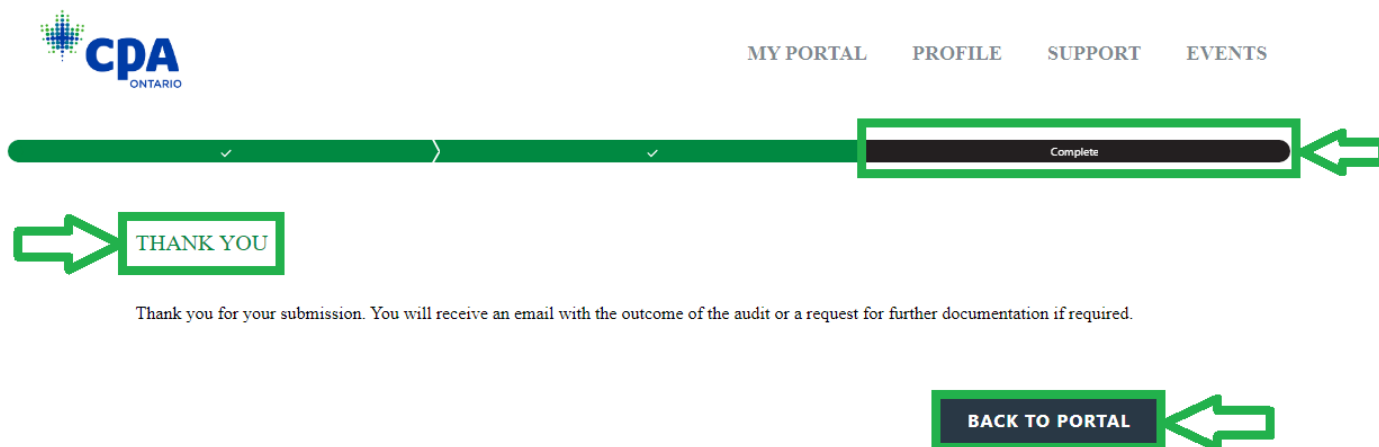
BACK

SUBMIT

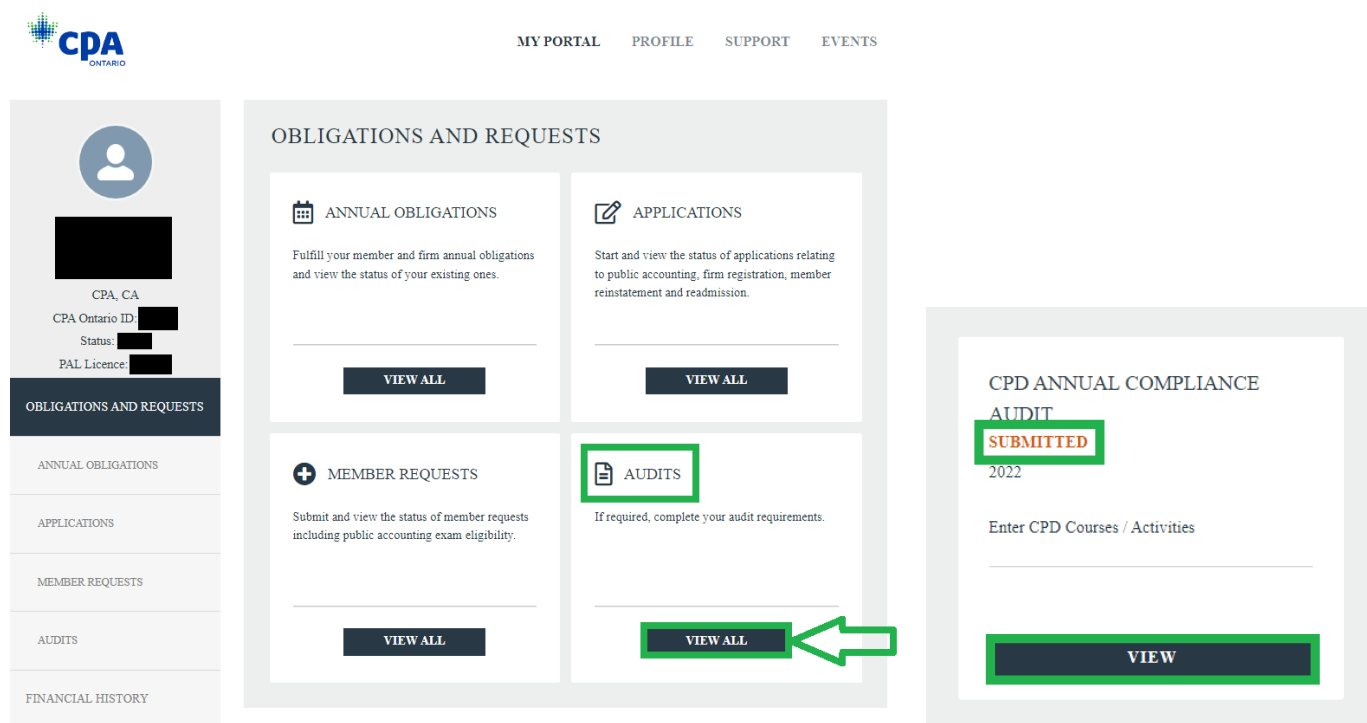
**IMPORTANT NOTE:** After selecting **SUBMIT**, you will not be able to make changes so please carefully review before submitting.



8. After clicking **SUBMIT** you will see a confirmation screen.



9. You can click on **BACK TO PORTAL** to return to the Obligations and Requests page.  
Click on **VIEW ALL** to see that your status has now been updated to Submitted.



The screenshot displays the CPA Ontario portal interface. At the top, the CPA Ontario logo is on the left, and navigation links (MY PORTAL, PROFILE, SUPPORT, EVENTS) are on the right. The main content area is titled 'OBLIGATIONS AND REQUESTS' and contains four sections: ANNUAL OBLIGATIONS, APPLICATIONS, MEMBER REQUESTS, and AUDITS. Each section has a 'VIEW ALL' button. The 'AUDITS' section is highlighted with a green box, and a green arrow points to its 'VIEW ALL' button. To the right of the main content, there is a separate box titled 'CPD ANNUAL COMPLIANCE AUDIT 2022'. This box shows a 'SUBMITTED' status (highlighted with a green box) and a 'VIEW' button (also highlighted with a green box).