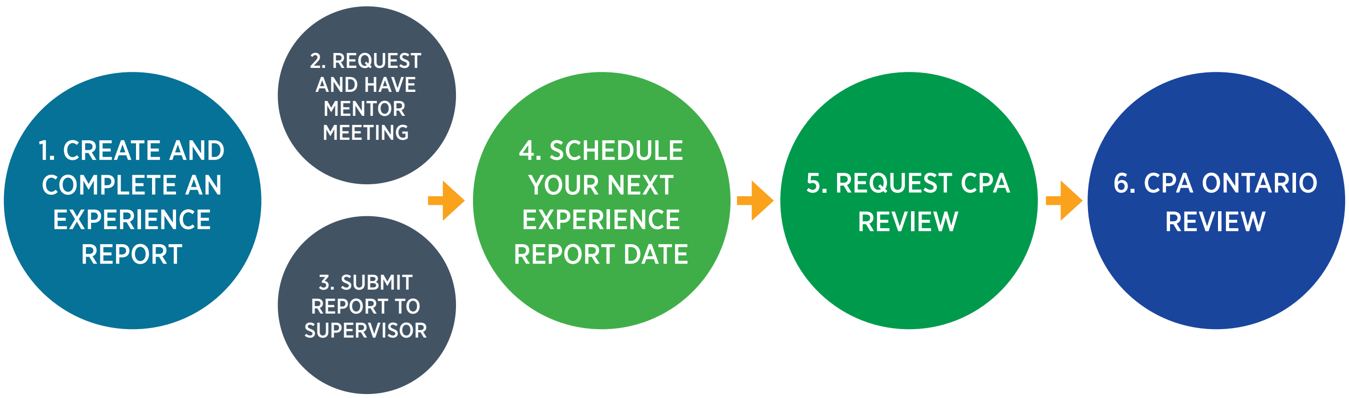
A GUIDE TO COMPLETING EXPERIENCE VERIFICATION REPORTS

THE PROCESS



1. Create and Complete an Experience Report

Create your first experience report about six months after your PER Start Date[1]. Relevant work experience gained prior to this date can be captured in a prior experience report, but will be capped at 12 months and must have been gained in roles that ended in the past 5.5 years. You must complete a separate experience report in PERT to claim this. Once you have completed your report, go to the Consolidated Summary" tab and click "View Summary" for the reports you have completed to date. Do the competencies and levels you are claiming seem reasonable based on the length of time you are reporting? See the following pages of this document for additional guidance.

1 Your PER Start Date is the date your current employment experience begins to be recognized towards the 30-month duration requirement. This date is in your PERT profile.

2. Request and Have a Mentor Meeting

Once you have completed the report, schedule and have your mentor meeting. Ensure that your mentor documents a summary of your discussion in PERT.

3. Submit Report to Supervisor

Update your report if required based on your mentor meeting discussion, and then send to supervisor for verification.

4. Schedule Next Report Date

Ensure you schedule your Next Experience Report Date in PERT. Reports should be updated/completed every 6 months.

5. Request a CPA Review

If your CPA Review is due, as per the date indicated in PERT, request a CPA review at this time. Ensure your reports are in a verified status and your mentor meetings have been documented in PERT.

Upon review of your submission to CPA Ontario, your reviewer will assess/assign the appropriate proficiency level and provide notes under the technical/enabling competency area. They will set your report to a "reviewed" status, recognize duration, and complete your assessment.

If this was not your final report, you will be provided with the date of your next expected CPA review. This date assumes you remain employed in your current position. You must request a CPA Review ahead of this date if you change positions or employers.

You may not receive approval for all the competencies you have claimed on your report. As long as you meet requirements to continue beyond 12 months, you do not need to request another CPA review until you have met all the exit requirements[2], unless otherwise indicated by your Next CPA Review date.

2 CPA Ontario may, on occasion, require you to make revisions to your duties or clarify your responsibilities. You will have 30 days to respond. (Note: if the revisions are not completed within 30 days, your review request will be cancelled. Once you have completed any revisions, you will submit your experience reports for verification again. Once obtained, resubmit your review request. Processing time for resubmission is approximately two weeks.

CHECKLIST FOR COMPLETING AN EXPERIENCE REPORT

TECHNICAL COMPETENCIES

- Refer to the Guiding Questions and Rubric document for help on what information to document in your technical competencies.

☐ **Are the competencies that you are claiming reasonable?**

- Does your job description support them? If not, it is recommended that you add a comment about how you have been able to gain additional opportunities outside of your job description.
- For example, if you are in a Financial Analyst position, it would not be expected that you are developing the Audit & Assurance competencies. If you have done a special project to gain competencies outside of your normal responsibilities, note this clearly in your response, as well as how long you were on the project.

☐ **Are you claiming the right amount of competencies and are they at the right level?**

- Students only need to achieve a minimum of eight sub-competencies overall, with minimum four of them at a Level 2, in a minimum of 30 months (and a maximum of seven years) of practical experience. Typically, after 12 months of employment, a student claims three to four competencies, with most at Level 1. If a student has significant prior experience or an extremely robust position, then it may be possible for them to achieve atypical results within 12 months. Typically, depth, breadth and core would not be met in less than 24 months.
- Please assess your reports using the "Consolidated Summary" tab in PERT for details.

☐ **Refer to our practical experience competencies for more information on the core, depth, breadth and progression requirements.**

☐ **Have you claimed the same duty/task in more than one competency?**

- Reviewers will check to see that each competency is supported by a unique set of position duties. Carefully review the competency requirements and examples that have been provided to see where your job duty best fits. See the question mark beside each sub competency in PERT.

- [ ] **In order to achieve proficiency, you must demonstrate all parts of the competency as outlined, even at a Level 1. If you do not meet all of the requirements of the competency, you will be assessed at a Level 0.**

  - Are your examples unique to your position and did they occur during the time period covered by your report?
  - For competencies with multiple parts, can your reviewer see which "or" statement you are targeting, or see that all "and" statements have been met?
  - It is not sufficient to copy and paste the requirements or examples provided in reference sources/material. If your report is completed using "copy and paste," it will be returned to you for revision.
  - Check our videos about documenting your technical competencies for more helpful tips

- [ ] **Do you feel you are at Level 2 in one or more of your technical competencies? Ensure your situation supports this and documentation reflects this. Achieving Level 2 is the right combination of complexity, autonomy and frequency. Here are some factors that CPA Reviewers will consider when deciding if a Level 2 can be assessed:**

  - **Autonomy:** you are working on tasks more independently as you progress through your work term.
  - **Complexity:** the type of analysis you are performing must demonstrate a certain degree of difficulty in order to achieve a level 2. Ensure that you document what these factors are. Complexity involves applying judgment, weighing options and considering interrelationships. A more complex task is often non-routine in nature, has multiple interrelationships that must be considered simultaneously and may require innovative approaches.
  - **Frequency:** how often have you performed this task (ie monthly, quarterly, annually)? If you are only executing a task once or twice, you'll likely need more time before you can demonstrate a Level 2 proficiency. Ensure you document the frequency of your work.
  - **Recommendations:** achieving a level 2 does not just involve performing a good analysis. You must also provide recommendations as part of this process which demonstrate the impact to your organization.
  - **Multiple examples:** Ensure you provide multiple examples of the complex work you have performed in order to demonstrate your proficiency.
  - **Progression:** Progression demonstrates the ability to perform more difficult, less routine work with increasing autonomy throughout your work term. At the start of your experience, your work may be largely confined to retrieving and comprehending information (Level 0). At the end of your experience, you are expected to have developed the ability to problem solve, as well as take on increasingly complex and less routine work (Level 2).

- [ ] **Are you working in a public accounting firm environment?**

  - If so, you are required to provide additional information in order for CPA Ontario to review your experience report.
  - Fill out and have your supervisor sign the Summary of Chargeable Hours and Clients form, and then attach it to your report in PERT before requesting a CPA review.

ENABLING COMPETENCIES

☐ **Have you demonstrated an in-depth understanding of the situation you are reporting on in your enabling competencies?**

- One or two sentences are not sufficient to fully address the enabling questions. For example, sections (a) of questions 1 and 2 have multiple parts. Following the CPA Way will help ensure your enabling competency responses are appropriate. Where applicable, ensure you have explained alternative actions you could have taken as well as the pros and cons of each. You can find the CPA Way assessment rubric in PERT by clicking on the blue question mark next to the heading 'enabling competencies' in the Enabling Competencies tab.
- Section (c) of each question is intended to encourage you to reflect on your growth in that competency area. Identifying areas of weakness, as well as areas of strength, will help the reviewer see that you have considered your own professional growth and the implications of your actions. Ensure you have demonstrated a deep reflection on what you have learned from the situation and how you would apply this to a similar situation you may encounter in the future. What would you do differently next time?
- Summary Question A is required for every report. As a best practice, Question B should also be answered.
- As you are completing your enabling competency responses, keep in mind that you need to achieve a Level 2 proficiency in all the enabling competencies by the completion of your term of practical experience.
- The responses you provide must relate to your practical experience environment you are reporting on. They cannot relate to a previous role or to the CPA Professional Education Program.
- Check our videos about documenting your enabling competencies for more helpful tips.

☐ **Is your style of communication professional and does it clearly demonstrate what you have accomplished?**

- Remember that this is a formal report of your experience that is being submitted to the profession for assessment. You may be asked for revisions if your spelling and grammar are not at a professional level.
- The reviewer needs to understand from your description what you performed as an individual. Avoid using phrases such as:
  - My team performed...
  - My company ....
  - I am able to...

Please clearly state **what tasks you completed on your own**, even if your work was reviewed.

☐ **Have you reviewed your report with your mentor?**

- Please review your report with your mentor during your semi-annual meetings before requesting a CPA review. Any areas of concern with your report should be discussed with your mentor or supervisor as appropriate.
- Use this high-level PE Checklist throughout your practical experience journey.