MENTORSHIP PROGRAM STEPS – EVR

REGISTRATION
- Apply to volunteer as a mentor through the PERT application.
- Check the mentor requirements.

FIND
- Once registered, set up an introductory meeting with the student.
- If you haven't already, register your email address in the Practical Experience Reporting Tool (PERT).

MATCH
- Provide the student with the email address you registered with.
- Once the student adds your email to their PERT profile, you will receive and email confirmation from PERT.

GET ACQUAINTED
- Set up an introductory meeting with your mentee within the first few weeks of matching. Getting to know each other will lay the foundation for an effective and mutually beneficial relationship.
- Establish a communication plan including the frequency and timing of contact.

1ST MANDATORY MEETING
- The first meeting should take place and be documented in PERT at around the 12-months from your initial meeting. The PERT Start Date is the date from which current practical experience begins to be accumulated. The first meeting should focus on the PERT on the student’s profile.
- You will receive an email from PERT notifying you that your mentee is ready for their first meeting and requesting that you schedule a meeting.
- Schedule a date and time in your personal calendar to meet with your mentee.
- Login to PERT to review your mentor’s experience report. Run a consolidated summary to see an overview of your mentor’s progress. Review the information your mentor reported in the Technical and Enabling Competencies sections. This information may need to be reviewed for reasonableness. Refer to the notes.
- Discuss your progress, focusing on their enabling competencies.
- Adjust the competency learning plan for future development.
- Document your meeting date and comments in PERT.

2ND MANDATORY MEETING
- Approximately 12 months of current practical experience.
- This meeting should take place and be documented in PERT at around the 24-months from your initial meeting.
- Complete a self-assessment experience report reflecting on the development of your Technical and Enabling Competencies. Submit the report to your supervisor for verification.
- Complete a consolidated summary, PERT, to see whether you have met the reporting requirements and discuss next steps.

CHECK-IN WITH CPA ONTARIO
- Initially after completing your second mandatory meeting in PERT, you will receive an email from CPA Ontario with your Next CPA Review Date in PERT.
- Share the feedback you receive from CPA Ontario with your mentor and adjust the meeting plan if necessary.

3RD TO 5TH MANDATORY MEETINGS
- Approximately every six months of current practical experience after second meeting.
- Complete a self-assessment experience report reflecting on the development of your Technical and Enabling Competencies. Submit the report to your supervisor for verification. Refer to your Next CPA Review Date in PERT.
- Share the feedback you receive from CPA Ontario with your mentor and adjust the meeting plan if necessary.
- Review your mentor’s experience report. Run a consolidated summary in PERT to see whether your mentee has met the reporting requirements and discuss next steps.
- Meet with your mentor to discuss your progress, focusing on their enabling competencies.
- Adjust the learning plan for future development.
- Update your experience report for any changes from meeting. Submit the report to your supervisor for verification.

COMPLETION REPORTING TO CPA ONTARIO
- If all practical experience requirements are met, advise your mentor to request a completion review through PERT. CPA Ontario will review all of their verified experience reports to determine if your mentor has met the practical experience requirements. If they have, proceed to next step. If not, meet with your mentor to adjust the completion plan.

END FORMAL MENTORING PROCESS
- A fourth and/or fifth mentor meeting may not be required depending on how much prior experience the student has. For example, if they have reported 12 months of prior experience, this meeting may not be required. If they have reported 24 months of prior experience, this meeting may be required. Refer to the notes.

Congratulations! You have met all the formal experience requirements. You are now eligible to apply for registration.