

MENTORSHIP PROGRAM STEPS - EVR

MENTOR

REGISTRATION

- ☐ Apply to volunteer as a mentor. Access the [PERT application](#).
- ☐ Join the Mentor Match portal. Select "I want to mentor any suitable match" when completing the application.

FIND

- ☐ Interested students will either approach you directly or send you a mentoring request to the email address you registered with.

MATCH

- ☐ Provide the student with the email address you registered with so they can add you to their profile in the Practical Experience Reporting Tool (PERT). PERT will be the tool you will use to communicate your mentee's progress to CPA Ontario.
- ☐ Once a student adds your email to their PERT profile, you will receive an official mentor match email confirmation from PERT. The student has now become your mentee.
- ☐ Exchange contact information with your mentee, so you can reach each other outside of the reporting tool.

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 [mentorship agreement](#) with your mentee, outlining how your relationship will work, how frequently you will be in touch, and what you both hope to achieve through the relationship.
- ☐ Assist your mentee in establishing a learning plan (available in the resource section of PERT) of how they will achieve their Enabling Competencies development, including any relevant prior experience gained to date.

1ST MANDATORY MEETING

- The first meeting should take place and be documented in PERT at around the 6-month mark from your mentee's PER Start Date. The PER Start Date is the date from which current practical experience begins to accumulate. This date can be found in PERT on the student's profile.
- ☐ You will receive an email from PERT notifying you that your mentee is ready for their mentor meeting and requested to meet.
 - ☐ Set up a date and time in your personal calendar to meet with your mentee.
 - ☐ Log in to PERT to review your mentee's experience report. Run a consolidated summary to see an overview of your mentee's progression. Review the information your mentee reported in the Technical and Enabling Competencies sections. Technical Competencies only need to be reviewed for reasonableness. Refer to for more details.
 - ☐ Discuss your mentee's progress, concentrating on their Enabling Competencies.
 - ☐ Adjust the competency learning plan for future development.
 - ☐ Document your meeting date and comments in PERT.

2ND MANDATORY MEETING

- (After approximately 12 months of current practical experience)
- ☐ Repeat steps under "1st Mandatory Meeting."

CHECK-IN WITH CPA ONTARIO

- ☐ After you complete reporting your second mandatory meeting in PERT, remind your student to submit their reports to CPA Ontario for review if required. Students should refer to their Next CPA Review Date in PERT.
- ☐ Ask your mentee to share the feedback they received from CPA Ontario following the review.

3RD TO 5TH MANDATORY MEETINGS

- (Approximately every six months of current work experience after second meeting)
- ☐ Continue repeating meeting steps outlined in "1st mandatory meeting."
 - ☐ Run a consolidated summary in PERT to see whether your mentee has met their reporting requirements and discuss next steps.
 - ☐ If reporting requirements have not been met, adjust the learning plan and continue to meet until your mentee has met the Practical Experience Requirements.
 - ☐ 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, they will only report 18 months of current experience which will require just three mentor meetings.

COMPLETION REPORTING TO CPA ONTARIO

- ☐ If all reporting requirements are met, advise your mentee to request a completion review through PERT. CPA Ontario will review all of their verified experience reports and, with the help of your comments, determine if your mentee has met the requirements. If they have, proceed to next step. If not, meet with your mentee to adjust the competency development plan to meet the outstanding requirements.

END FORMAL MENTORING PROCESS

- ☐ Ask your mentee to share their final review results from CPA Ontario.
- ☐ If all practical experience requirements are met, congratulations! Your guidance and support were instrumental in helping your mentee achieving their goal of becoming a CPA.

START

END

STUDENT

REGISTRATION

- ☐ If you haven't already, [register](#) as a CPA Ontario student.
- ☐ Once registered, [set up your profile](#) in the Practical Experience Reporting Tool (PERT).

FIND

- ☐ Secure a job placement that would allow you to meet the Practical Experience Requirements.
- ☐ Submit your job description to CPA Ontario for review by requesting a [Pre-Assessment](#) through PERT.
- ☐ Search within your professional network for a CPA member you would like to be your mentor. Approach them and ask them to sign up to be a mentor, if they aren't already registered. If you still have not added your mentor once your Pre-Assessment has been approved, you will have access to the Mentor Search portal in your PERT profile.

MATCH

- ☐ Add your mentor's email address to your PERT profile. Ensure it is the same email they used in their application.
 - ☐ Once your mentor has been added to your profile and your Pre-Assessment request is approved, your PER Start Date* will be set.
 - ☐ Report any relevant experience that falls before the PER Start Date in a prior experience report.
- * PER Start Date is the date from which current practical experience begins to accumulate.

GET ACQUAINTED

- ☐ Set up an introductory meeting 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 [mentorship agreement](#) with your mentor, outlining how your relationship will work, how frequently you will be in touch, and what you both hope to achieve through this relationship.
- ☐ Ask for your mentor's assistance in establishing a learning plan (available in the resource section of PERT) of how you will achieve your Enabling Competencies development. Review your relevant prior experience with your mentor to incorporate it into the plan.

1ST MANDATORY MEETING

- (First meeting should take place and be documented approximately six months after the PER Start Date)
- ☐ Complete a self-assessment experience report reflecting on the development of your Technical and Enabling Competencies in the course of your work experience over the last six months.
 - ☐ Once completed, request a mentor meeting through the reporting tool. Reach out to your mentor through the contact channel you established at the onset of your relationship (by email, phone, etc.) to set up a mentor meeting.
 - ☐ Meet with your mentor to discuss your progress, concentrating on 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.

2ND MANDATORY MEETING

- (Approximately 12 months of current practical experience)
- ☐ Repeat steps under "1st Mandatory Meeting."

CHECK-IN WITH CPA ONTARIO

- ☐ Immediately after completing your second mandatory meeting with your mentor, request a CPA Review if required (refer to your Next CPA Review date in PERT).
- ☐ Share the feedback you receive from CPA Ontario with your mentor and adjust the learning plan if necessary.

3RD TO 5TH MANDATORY MEETINGS

- (Approximately every six months of current work experience after second meeting)
- ☐ Continue repeating meeting steps outlined in "1st mandatory meeting."
 - ☐ Run a consolidated summary in PERT to see whether you have met your reporting requirements and discuss next steps with your mentor.
 - ☐ If you have not met the reporting requirements, adjust the learning plan and continue to meet with your mentor until you have met the Practical Experience Requirements.
 - ☐ A fourth and/or fifth mentor meeting may not be required depending on how much prior experience you have. For example, if you have reported 12 months of prior experience, you will only report 18 months of current experience which will require just three mentor meetings..

COMPLETION REPORTING TO CPA ONTARIO

- ☐ If all reporting requirements are met, request a completion review to CPA Ontario through PERT. CPA Ontario will review all your verified experience reports and determine if you have met the requirements. If you have, proceed to next step. If not, meet with your mentor to adjust the learning plan to meet the outstanding requirements.

END FORMAL MENTORING PROCESS

- ☐ Congratulations! You have met all the Practical Experience Requirements and may now be eligible to apply for [membership](#).