

MENTORSHIP PROGRAM STEPS - PPR

3RD TO 5TH 2ND 1ST GET REGISTRATION MATCH FIND MANDATORY MANDATORY MANDATORY ACQUAINTED MEETING MEETINGS MEETING As part of a Pre-Approved The first meeting should take place and be (After approximately 12 months of Apply to volunteer as a mentor. Provide the student with the email address you Set up an introductory meeting (Approximately every six months registered with so they can add you to their profile in the documented in PERT at around the 6-month current practical experience) Program, a student will be with your mentee within the Access the PERT application of current work experience after assigned to you by your Practical Experience Reporting Tool (PERT). PERT will first few weeks of matching. mark from your mentee's PER Start Date. The second meeting) Repeat steps under Indicate that you are part of a organization be the tool you will use to communicate your mentee's Getting to know each other PER Start Date is the date from which current '1st Mandatory Meeting.' Continue repeating meeting Pre-Approved Program (PPR) practical experience begins to accumulate. progress to CPA Ontario will lay the foundation for an and provide the required details. If you have joined the Mentor steps outlined in "1st mandatory effective and mutually beneficial Match Portal, you may receive a You will receive an official mentor match email ☐ You will receive an email from PERT meeting. relationship. ☐ If you wish to mentor additiona request from a student outside confirmation from PERT. The student has now become notifying you that your mentee is ready Run a consolidated summarv students outside of your for their mentor meeting and requested your PPR, interested in being Establish a mentorship vour mentee. PPR, select "I want to mento in PERT to see whether your your mentee agreement with your mentee, any suitable match" in the Exchange contact information with your mentee so you mentee has met their reporting outlining how your relationship MENTOR Set up a date and time in your personal application form to join the can reach each other outside of the reporting tool. requirements and discuss next will work how frequently you Mentor Match Portal. calendar to meet with your mentee stens will be in touch, and what you both hope to achieve through Log in to PERT to review your mentee's If reporting requirements the relationshin experience report. Run a consolidated have not been met, adjust the summary to see an overview of your learning plan and continue to Assist your mentee in mentee's progression. Review the meet until your mentee has establishing a learning plan information your mentee reported in the met the Practical Experience (available in the resource Technical and Enabling Competencies section of PERT) of how they Requirements sections. Technical Competencies only will achieve their Enabling A fourth and/or fifth mentor need to be reviewed for reasonableness Competencies development, Refer to PERT Guide for CPA Mentors for meeting may not be required incorporating any relevant prior depending on how much prior experience gained to date. experience the student has Discuss your mentee's progress reported. For example, if they concentrating on their Enabling have reported 12 months of Competencies prior experience, they will only report 18 months of current Adjust the learning plan for future experience which will require development just three mentor reviews. Document your meeting date and comments in PERT. START 3RD TO 5TH 2ND 1ST GET REGISTRATION FIND MATCH MANDATORY MANDATORY MANDATORY ACQUAINTED MEETING MEETING MEETINGS The first meeting should take place and (Approximately 12 months of If you haven't already, register Secure a job placement in a Pre-Vour mentor is assigned to you by your PPR. If you do Set up an introductory meeting (Approximately every six months be documented in PERT approximately six as a CPA Ontario student. approved CPA Student Training within the first few weeks of current practical experience) not know who your mentor is, reach out to your Program of current work experience after months after the PER Start Date. Program (PPR) that is offered matching. Getting to know each second meeting) Manager Repeat steps under Once registered, set up other will lay the foundation by your employer organization. Add your mentor's email address to your PERT profile. Complete a self-assessment experience your profile in the Practical "1st Mandatory Meeting." Continue repeating meeting for an effective and mutually Experience Reporting Tool Update your employment in Ensure it is the same email they used in their application report reflecting on the development of steps outlined in "1st mandatory beneficial relationship. Important: you must have two your Technical and Enabling Competencies meeting." (PERT) vour PERT profile. Create a new experience report in PERT outlining the mentor meetings for every 12 in the course of your work experience over Establish a mentorship months of current practical start date of your employment in the Pre-Approved 🗆 Run a consolidated summary agreement with your mentor, the last six months. Program. experience and the meetings mus in PERT to see whether you outlining how your relationship Once completed, request a mentor be at least four months apart to have met your reporting will work, how frequently you ☐ Your Program Manager will need to confirm your meeting through PERT. Reach out to your ensure you do not incur a duration requirements and discuss nex STUDEN will be in touch, and what you enrollment in the PPR through PERT. Please note your mentor through the contact channel you penalty. steps with your mentor. both hope to achieve through Program Manager will not be able to complete this step established at the onset of your relationship this relationship if you have not added your mentor and created a new If you have not met the (by email, phone, etc.) to set up a mentor experience report reporting requirements, adjust Ask for your mentor's assistance eview meeting the learning plan and continue in establishing a a learning ☐ You will receive a notification from PERT confirming Meet with your mentor to discuss your to meet with your mentor until plan (available in the resource you have been added to the program roster. Your status progress, concentrating on Enabling you have met the Practical section of PERT) of how you will change to "In Progress" and your PER Start Date* Competencies Experience require will achieve your enabling will be set. competency development Adjust the learning plan for future A fourth and/or fifth mentor Report any relevant experience that falls before the PER Review your relevant prior development. meeting may not be required Start Date in a prior experience report. Students can experience with your mentor to depending on how much prior Update your experience report for any report up to 12 months of prior experience. incorporate it into the plan. experience you have. For changes from meeting if required, and Exchange contact information with your mentor so you example, if you have reported then click o "verify" to change the report 12 months of prior experience, can reach each other outside of the reporting tool. status to verified you will only report 18 months The PER Start Date indicates the beginning of your of current experience which Current Practical Experience duration. It is set by PERT will require just three mentor when you add an approved mentor to your PERT profile reviews. and you are confirmed on a Pre-Approved Program Roster

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 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 learning plan to meet the outstanding requirements.

END FORMAL MENTORING PROCESS

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

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

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Congratulations! You have met all the Practical Experience Requirements and may now be eligible to apply for membership.