

Instructions for PPR Roster Changes in PERT

Instructions for [“Students Joining your Program”](#)

Instructions for [“Students Leaving your Program”](#)

Students Joining your Program

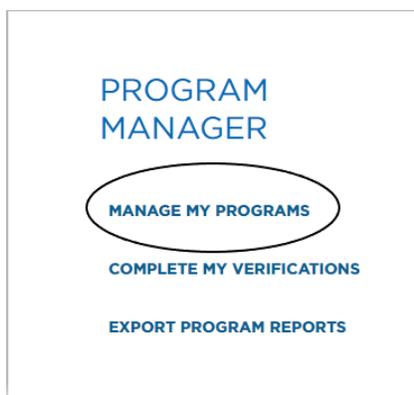
Students who join your Pre-Approved Program must complete the following steps in PERT:

1. Update their PERT Profile to “Pre-Approved Program” path.
2. Complete the required information on your organization/program
3. Create an initial report with their job start date
4. Adding their assigned mentor to their PERT profile from the PPR (*please ensure you have notified the student who their mentor is*).

The **Program Manager (PM)** will receive an email as soon as a student has indicated they are a part of your PPR.

The screenshots below will help you with where to confirm their enrolment in PERT, as well as reasons why you may not be able to.

1. Log into your [PM portal](#)
2. Click on “Manage my Programs” on the left-hand side:



3. This will pull up the list of all students.
4. Click on “Pending Employment Confirmation Only” on the right side of the page, to filter the list



5. On the right-hand side of the student's name, there will be an Employment Confirmation box.
6. **If a student has taken all the required steps outlined above**, you will have 3 options:

EMPLOYMENT CONFIRMATION

Employed
 Follow Up
 Not Employed

7. If the student is in fact part of your program and has indicated the correct information, click "Employed". This will update the student status to "In Progress" and they will officially be enrolled in your program in PERT.
8. If you only have "Follow-up" or "Not employed", then the student has missed a step:
 - o Look at their Start Date field and their Mentor field:

NAME	PROGRAM	LOCATION	START DATE	FOLLOW UP DATE	PER STATUS	MENTOR	PROVINCIAL/REGIONAL BODY	EMPLOYMENT CONFIRMATION
Fake S96566	Rotational - Risk Advisory	Toronto - Bay Adelaide Centre East Tower		2022-12-08	Employment Confirmation Required		Ontario	<input type="radio"/> Follow Up <input type="radio"/> Not Employed

- o If their start date field is blank, the student has not created that initial experience report to indicate their start date in your program
- o If their mentor field is blank, the student has not added their assigned PPR mentor to their PERT profile.
- o You will need to click "Follow-up" and then provide instructions, indicating what step was missed. Please ensure you also ask the student to email you once the outstanding requirements have been completed.
- o You will then need to click "yes" under the comments box and "submit" at the bottom of the page.
- o Once the student has completed the required steps, you will be able to click "Employed".
- o The Program Manager is responsible for confirming students into the program within 30 days of receiving the student request. *Best practice is 15 days.*



Students Leaving your Program:

CPA students who are no longer employed in your Pre-Approved Program are required to take steps to close off their experience so that they can properly be removed from your PERT roster. As per the [Practical Experience Requirements](#), this process should be completed no more than **90 days** after their last day of paid employment.

As a Pre-approved Program, you are required to work with your students directly to ensure the proper steps are taken in a timely manner.

1. Within **one week** of a CPA student leaving your program, the **Program Manager (PM)** should complete the following steps:
 - Log into the [PM portal](#) and click on “Manage My Programs”
 - Locate the student’s name and click the “Employment Ended” button on the right side.
 - Indicate their last day of paid employment and click “YES”
 - Click “Submit” on the bottom of the page

The screenshot shows a web interface with a dialog box titled "EMPLOYMENT ENDED..." and a table titled "EMPLOYMENT CONFIRMATION ONLY".

The dialog box contains the text: "Please indicate the last date of paid employment." Below this is a date input field with a calendar icon. A calendar for March 2023 is displayed, with the date 9 (Thursday) highlighted.

The table has two columns: "REGIONAL BODY" and "EMPLOYMENT CONFIRMATION". The "EMPLOYMENT CONFIRMATION" column contains the text "Employment Ended" for each row, which is circled in red.

PER STATUS	REGIONAL BODY	EMPLOYMENT CONFIRMATION
In Progress		Employment Ended

SUBMIT

This will trigger an email to the student that they are due to request a CPA Review and provide them with the [Change of Job process](#).

2. Follow up with the former student directly to ensure they take the proper steps to complete the [Change of Job process](#) in a timely manner (*within 90 days of leaving your program*).
 - This would include having a final meeting with their assigned mentor. The mentor should ensure the student's self-assessment (i.e. their Consolidated Summary) is reasonable and reflective of the work they completed in your program.
 - If they are part of an External Audit pre-approved program, they are required to attach a completed [Chargeable Hours form](#) to their report.
 - Once the student has updated their reporting for their duration in your PPR, the reports are in a verified status, and a final mentor meeting has been documented, they can request a CPA review for "change of job".
3. The Program Leader (PL) will receive an email notifying them the student's experience is ready for sign-off. The PL should log into their [Portal](#) and complete the Program Leader Certification Steps within 30 days of receiving the request. *Best practice is within 15 days.*
4. The detailed steps for Program Leader Certification can be found on page 8 of the **"PERT Guide for Program Managers and Program Leaders"**, located within the "Resource" section in PERT:

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5. CPA Ontario will then review the experience and remove the student from your roster within 3 weeks of the PL signing off.

TIP: if the Program Manager waits too long to indicate the employment has ended, or if you do not follow up with the student to ensure they take the proper reporting steps, they will continue to remain on your roster indefinitely. This takes a spot away from other students in your program so it's important to ensure these steps are actioned on a timely basis.