

# PRACTICAL EXPERIENCE CHECKLIST

The purpose of this document is to provide you with a checklist of steps to follow through your practical experience journey in PERT, as well as providing additional resources for each step along the way. Save this document and check off each step as you complete it.

	STEP IN PROCESS	DETAILS
1	<input type="checkbox"/> Review the <a href="#">Practical Experience Welcome Package</a>	<p>This document provides an overview of the practical experience journey and how to get started, including watching the <a href="#">Introduction to PE Videos</a>.</p> <p>Ensure you are familiar with the <a href="#">Academic Code of Conduct</a> and <a href="#">The Academic Integrity and the Use of Artificial Intelligence Policy</a> which apply to both the Professional Education Program (PEP) and practical experience (PERT).</p>
2	<input type="checkbox"/> Create profile in <a href="#">PERT</a>	<p><a href="#">Setting up your PERT profile</a> </p> <p><b>TIP</b></p> <p><b>You can still create a profile even if you don't yet have a CPA Mentor, however you won't be able to start reporting any experience until you have added a Mentor.</b></p>
3	<input type="checkbox"/> Set your <a href="#">PER Start Date</a>	<p>PPR: <a href="#">Confirming your Pre-approved Program</a> </p> <p>EVR: <a href="#">Requesting a pre-assessment</a> </p>
4	<input type="checkbox"/> Self-assess your current experience semi-annually in PERT (every 6 months is recommended) <div> <input type="checkbox"/> Report 1             <input type="checkbox"/> Report 2             <input type="checkbox"/> Report 3             <input type="checkbox"/> Report 4             <input type="checkbox"/> Report 5           </div>	<p>Create an experience report and self-assess your <a href="#">competency development</a> for that reporting period. Watch the “How to Report in PERT” video series (<a href="#">EVR</a>  or <a href="#">PPR</a> ) for helpful tips on how to document your progress.</p> <p>EVR students should review the <a href="#">Guide to Completing EVR Reports</a> and use the <a href="#">Guiding Questions and Rubric</a> to document their technical competencies. The process for your supervisor to verify your EV reports can be found in the <a href="#">Supervisor Verification Instructions</a> document.</p> <p>Complete a Prior experience report if you have any experience from before your PER Start Date.</p> <p><b>TIP</b></p> <p><b>EVR Students – A report in “Completed” status means you have completed your report, but it has not yet been verified. This can be done by clicking on “send to supervisor”. When you request a CPA Review, we will look only at your verified reports.</b></p> <p><b>You are not required to have a mentor meeting to discuss any prior experience you report, but it is recommended.</b></p>
5	<input type="checkbox"/> Meet with your CPA Mentor semi-annually to discuss your experience reports <div> <input type="checkbox"/> Meeting 1             <input type="checkbox"/> Meeting 2             <input type="checkbox"/> Meeting 3             <input type="checkbox"/> Meeting 4             <input type="checkbox"/> Meeting 5           </div>	<p><a href="#">Mentorship Program Steps – EVR</a></p> <p><a href="#">Mentorship Program Steps - PPR</a></p> <p><b>TIP</b></p> <p><b>Run the Consolidated Summary in PERT during your mentor meetings to see how you are tracking against the practical experience requirements.</b></p> <p><b>There is a one-month duration penalty for every missed mentor meeting so be sure to keep up with your semi-annual reporting.</b></p>
6	<input type="checkbox"/> Request a CPA Review	<p>We review your verified experience once you have requested a CPA Review in PERT. Refer to the “Next CPA Review Due Date” in PERT or if you have switched jobs, please refer to the <a href="#">Change of Job Factsheet</a>.</p>

Repeat the steps above as necessary until we have approved all of your practical experience.

Once we have determined that you have met the practical experience requirements, you will receive an email outlining admission to membership process if you have already completed the education requirements (PEP & CFE).

Additional resources can be found in PERT under the resource section, or on our website under the [Practical Experience Resource Centre](#).

If you need any help along the way, we can be reached at [practicalexperience@cpaontario.ca](mailto:practicalexperience@cpaontario.ca) or [mentor@cpaontario.ca](mailto:mentor@cpaontario.ca) or visit our website at [cpaontario.ca](http://cpaontario.ca).