

# PRACTICAL EXPERIENCE REQUIREMENTS: CHANGE OF JOB

Are you completing your practical experience requirements and have had a change in employment? If so, learn about the required CPA Review to ensure your reporting is up to date.

Within 90 days of your employment change date, you must request a CPA Review for Change of Job. After 90 days, you may be at risk of cancellation of your practical experience reports and loss of duration.

## When to Request a Change of Job CPA Review

- You are terminating employment with your current employer
- You are changing roles at your current employer (i.e. Financial Analyst to Internal Auditor)
- You are changing office locations within a Pre-Approved Program
- You are a co-op student going back to school

## Do Not Request a Review if:

- You are promoted within your role at the same employer (i.e. Analyst to Senior Analyst)
- You are a co-op student going back to school and your Program Leader has instructed you to stay on their roster as you will be returning to the same Pre-Approved Program

## Instructions

In the Practical Experience Reporting Tool (PERT), follow the applicable steps below based on your current employment path.

### Experience Verification Route (EVR)

- [Leaving a job in EVR for a new job in EVR](#)
- [Leaving a Job in EVR and Have Not Started a New Job](#)
- [Leaving a Job in EVR for a Job in PPR](#)

### Pre-approved Program Route (PPR)

- [Leaving a job in PPR for a new job in PPR](#)
- [Leaving a Job in PPR for a Job in EVR](#)
- [Leaving a Job in PPR and Have Not Started a New Job](#)

# EXPERIENCE VERIFICATION ROUTE (EVR)

## Leaving a job in EVR for a new job in EVR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Start Date needs to be documented in a Prior Experience Report. Experience that falls on and after your PER Start Date needs to be documented in a Current Experience Report. If you are working in a Public Accounting (Firm) environment, ensure you attach the [EVR Chargeable Hours Form](#).
2. Select "Complete" in the report details tab, then "Send to Supervisor", at which point your supervisor will receive a link to verify your report.
3. Upon supervisor verification, your report status will be set to Verified.
4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.
5. Create an initial experience report for your new job, including your job start date. **The report status should be left as New and no competencies should be filled out.** Attach your job description on company letterhead – **ensure it is signed by your manager or HR and saved in PDF format.**
6. In the CPA Reviews tab, click "Request CPA Review".
7. Select Change of Job Assessment from the drop-down menu.
8. Complete the Candidate Declaration and select Create.

This will send your reports to CPA Ontario for review, and you will be notified once complete. CPA Ontario will have also looked at your new job description and, if approved for reporting, your Reporting Status will remain "In Progress" and you'll be able to continue reporting in your new role.

## Leaving a Job in EVR and Have Not Started a New Job

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Start Date needs to be documented in a Prior Experience Report. Experience that falls on and after your PER Start Date needs to be documented in a Current Experience Report. If you are working in a Public Accounting (Firm) environment, ensure you attach the [EVR Chargeable Hours Form](#).
2. Select "Complete" in the report details tab, then "Send to Supervisor", at which point your supervisor will receive a link to verify your report.
3. Upon supervisor verification, your report status will be set to Verified.
4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.

5. In the CPA Reviews tab, click "Request CPA Review".
6. Select Change of Job Assessment from the drop-down menu.
7. Complete the Candidate Declaration and select Create.

This will send your reports to CPA Ontario for review, and you will be notified once complete. Your Reporting Status and Experience Path will be set to Unemployed and can be updated when you become employed again.

### **Leaving a Job in EVR for a Job in PPR**

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Start Date needs to be documented in a Prior Experience Report. Experience that falls on and after your PER Start Date needs to be documented in a Current Experience Report. If you are working in a Public Accounting (Firm) environment, ensure you attach the [EVR Chargeable Hours Form](#).
2. Select "Complete" in the report details tab, then "Send to Supervisor", at which point your supervisor will receive a link to verify your report.
3. Upon supervisor verification, your report status will be set to Verified.
4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.
5. In the CPA Reviews tab, click "Request CPA Review".
6. Select Change of Job Assessment from the drop-down menu.
7. Complete the Candidate Declaration and select Create.

This will send your reports to CPA Ontario for review, and you will be notified once complete. Your Reporting Status and Experience Path will be set to Unemployed and can be updated by following the below steps:

1. On your home page, select "complete" next to the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your reporting route to Pre-Approved Program, entering your new PPR information and new mentor's email. Click SAVE.
2. Back on your Home Page, select "complete" next to the Action Item "DOCUMENT YOUR CURRENT EMPLOYMENT", enter the required information and click SAVE and then click COMPLETE.
3. Update your mentor's email address from your PPR. If you are unsure, ask your Program Manager to confirm who your assigned mentor is.

Your Program Manager will receive an email to confirm your enrolment in the program. Once confirmed, your Reporting Status will change to In Progress and you can begin submitting experience under the Pre-approved Program Route.

## PRE-APPROVED PROGRAM ROUTE (PPR)

### Leaving a job in PPR for a new job in PPR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period. A reminder that experience that falls before your PER Start Date needs to be documented in a Prior Experience Report. Experience that falls on or after your PER Start Date needs to be documented in a Current Experience Report.
2. If you are in an External Audit program, attach a completed [Chargeable Hours Form](#). Ensure the dates match the dates of your experience report(s).
3. Select "Complete" in the report details tab, then "Verify".
4. Ensure your mentor reviews are documented accurately. Students must have at least two mentor reviews for every twelve months of current experience or after each 4-month co-op term. Two mentor reviews are required for an 8-month co-op term.
5. In the CPA Reviews tab, click "Request CPA Review".
6. Select Change of Job Assessment from the drop-down menu.
7. Select the correct Program Leader from the drop-down menu.
8. Complete the declarations and select Create.

This will send your reports to CPA Ontario for review, and you will be notified once complete. Your Reporting Status and Experience Path will be set to Unemployed. You can then complete the below steps to begin reporting in your new PPR:

1. On your home page, select "complete" next to the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your reporting route to Pre-Approved Program, entering your new PPR information and new mentor's email. Click SAVE.
2. Back on your Home Page, select "complete" next to the Action Item "DOCUMENT YOUR CURRENT EMPLOYMENT", enter the required information and click SAVE and then click COMPLETE.

Your Program Manager will receive an email to confirm your enrollment in the program. Once confirmed, your Reporting Status will change to In Progress and you can continue submitting experience in the Pre-approved Program Route.

## Leaving a Job in PPR for a Job in EVR

Complete the first 8 steps in "Leaving a job in PPR for a new job in PPR"

This will send your reports to CPA Ontario for review, and you will be notified once complete. Your Reporting Status and Experience Path will be set to Unemployed. You can then complete the below steps to begin reporting under EVR:

1. On the home page, select "complete" next to the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your experience route to Experience Verification and update your mentor (if necessary). Click SAVE.
2. Back on your Home Page, select "Complete" next to the Action Item "DOCUMENT YOUR CURRENT EMPLOYMENT", enter the required information and click SAVE.
3. Upload your current job description on letterhead. Ensure it is signed by your manager or HR, and saved in PDF format.
4. Return to the report details tab and click "Complete".
5. Click on the CPA Reviews tab, and Request Pre-Assessment. Complete the declaration and click "Request".

When your Pre-Assessment is approved, your Reporting Status will change to In Progress and you can continue submitting experience in the Experience Verification Route. If you have not added your mentor, you will need to do this within 90 days of being set to In Progress or your Reporting Status may be returned to Unemployed.

## Leaving a Job in PPR and Have Not Started a New Job

Follow steps 1-8 in "Leaving a Job in PPR for a Job in EVR."

Once your review is complete, you will be notified via email. Your Reporting Status and Experience Path will be set to Unemployed and can be updated when you become employed again.