

PERT Guide for Supervisors

The supervisor is the person to whom a future CPA reports for the position indicated in their experience report.

A supervisor must not be related to the future CPA and must occupy a position at a higher hierarchy level.

Supervisor responsibilities

Supervisors verify the accuracy of the experience report details and work experience. They do not assess the proficiency levels.

If a supervisor is also a mentor, program manager and/or program leader, note that supervisor verification can only be done by clicking on the link sent via email. Verification must be completed within 30 days, as the link will expire.


How to complete supervisor verification

You will receive an email with a direct link to the experience report.

- Click on the link within the email (link expires in 30 days)

This will take you to the *Report Details* page.

- Confirm the following is correct:
 - Start and end dates
 - Position title
 - Average hours worked per week
 - Leave taken
 - » A leave taken is defined as time away from work for any reason, including vacation, sickness, professional development, or study time.
 - Employer address
 - Employer information
 - Supervisor information
- Select **Agree** if the details are correct (or **Disagree** if they are not).
- Enter your comments (if you selected Disagree, please indicate what changes are required).
- Click **Save**.



[User Guide](#) | [Français](#) | [English](#) | Signed in as Example Supervisor | [Close](#)

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)

[REPORT DETAILS](#) | [TECHNICAL COMPETENCIES](#) | [ENABLING COMPETENCIES](#) | [NOTES](#) | [ATTACHMENTS](#) | [DECLARATION](#)

REPORT DETAILS

OVERVIEW

Status : Verification Requested	Calculated Duration : 11.05 months
Status Change Date : 2020-07-30	Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Prior EV	Experience Type : Experience Verification
Position Title : Junior Accountant	Employer : Example Employer
Position Type : Contract	Start Date : 2019-08-19
Average Hours Worked Per Week : 40.00	End Date : 2020-07-19
Leave Taken (days) : 10	

EMPLOYER INFORMATION

Primary Clients : External Personal	Industry : Health Care and Social Assistance
Total Number of Employees : 1000	Number of CPAs Employed : 1 - 5
Number of Employees in your Department : 11	Number of Direct Reports you Manage : 0

EMPLOYER ADDRESS

Street Address : 123 Fake Street	Country : Canada
City : Toronto	Postal Code : 1A1 A1A
Province : Ontario	

SUPERVISOR INFORMATION

First Name : Example	Position Title : Senior Finance Director
Last Name : Supervisor	Business Phone Number : 123456789
Email : examplesupervisor@mailinator.com	Language Preference : English
Accounting Designation : CPA	

SUPERVISOR VERIFICATION

Are the details on this page accurate? Agree Disagree

Supervisor Comments:

PRINT
CANCEL
SAVE

- Navigate to the *Technical Competencies* tab.

Here you can see a list of the technical competencies. If a sub-competency contains experience, you will see a “Verification Required” label.

- Click on the technical competency to view the sub-competencies.

The screenshot shows the CPA Chartered Professional Accountants interface. At the top, there is a navigation bar with the CPA logo, language options (Français, English), and user information (Signed in as Example Supervisor). The main heading is "PRACTICAL EXPERIENCE REPORTING TOOL (PERT)". Below this, the user profile is "First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)". A menu bar includes "REPORT DETAILS", "TECHNICAL COMPETENCIES" (highlighted), "ENABLING COMPETENCIES", "NOTES", "ATTACHMENTS", and "DECLARATION".


The "TECHNICAL COMPETENCIES" section contains the following text:

Below you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the key sub-competencies that pertain directly to your position for this reporting period.

Choose the applicable sub-competencies across different competency areas which you have developed in this reporting period. Click on the Competency Area to view the sub-competencies and use the (?) for guidance with your answers.

COMPETENCY AREA	YOUR SUB-COMPETENCIES	
Financial Reporting (?)	3	Verification Required
Audit & Assurance (?)	2	Verification Required
Finance (?)	0	
Taxation (?)	1	Verification Required
Strategy & Governance (?)	0	
Management Accounting (?)	2	Verification Required

- Confirm the work experience provided is detailed, comprehensive and properly represents the experience.
- Select **Agree** if the details are correct or **Disagree** if they are not.
- Enter your comments. (If you selected Disagree, please indicate what changes are required).
- Click **Save**.
- Repeat this for any remaining technical competencies.


User Guide | Français | English | Signed in as Example Supervisor | Close

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)

REPORT DETAILS | TECHNICAL COMPETENCIES | **ENABLING COMPETENCIES** | NOTES | ATTACHMENTS | DECLARATION

ENABLING COMPETENCIES ⓘ

Enabling competencies reflect the key elements that comprise the personal attributes of a CPA. There are five competency areas containing three-part questions. Choose the enabling competencies that most reflect your professional development obtained during this reporting period. Provide tangible examples and clear explanations to demonstrate how you've developed proficiency in each of the enabling competencies.

ENABLING COMPETENCY	ANSWERED
Question 1: Professional and Ethical Behaviour	✔
Question 2: Problem-Solving and Decision-Making	✔
Question 3: Communication	
Question 4: Self-Management	✔
Question 5: Teamwork and Leadership	

TIPS

- Ensure you also demonstrate how you applied the CPA Way. To learn more about the CPA Way and how to apply these principles when formulating your responses to these questions, [click here](#).
- For confidentiality reasons, do not include client, customer or organization names in your examples. Also note that the information in your Experience Reports is accessible to those involved in the review and verification process, including Program Leader/Manager, Supervisor, Mentor, CPA staff, etc.
- Breaches of the CPA Professional Code of Ethics by a designated CPA member (colleague, employer, client, etc.) should be reported to your provincial body.


SUPERVISOR VERIFICATION

Are the details on this page accurate? Agree Disagree

Supervisor Comments:

CANCEL
SAVE

- Confirm the examples provided are valid and properly represent their role.
- Repeat this for any remaining enabling competencies with answers.
- Select **Agree** if the details are correct (or **Disagree** if they are not).
- Enter your comments. (If you selected Disagree, please indicate what changes are required).
- Click **Save**.



CPA CHARTERED PROFESSIONAL ACCOUNTANTS

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PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)

REPORT DETAILS TECHNICAL COMPETENCIES ENABLING COMPETENCIES **NOTES** ATTACHMENTS DECLARATION

NOTES

Add Note

Note created on 2020-07-30 4:45:46 PM by First Last

Status set to Verification Requested

Note created on 2020-07-30 4:44:42 PM by First Last

Status set to Completed



CPA CHARTERED PROFESSIONAL ACCOUNTANTS

User Guide | Français | English | Signed in as Example Supervisor | Close

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)

REPORT DETAILS NOTES **ATTACHMENTS** DECLARATION

ATTACHMENTS

- Navigate to the *Declaration* tab.
- Complete the supervisor declarations:
 - *“Having reflected on the candidate’s behaviour and performance, I am satisfied that I have responded accurately to each of the sections of this experience report.”*
 - » Check this if you have responded accurately to each of the sections of the experience report.
 - *“I declare I have an arm’s length relationship with the student. For this purpose, arm’s length is not a family member.”*
 - » Leave this checked if you are not directly related.

The screenshot shows the CPA Practical Experience Reporting Tool (PERT) interface. At the top left is the CPA logo (Chartered Professional Accountants). To the right are links for 'User Guide', 'Français', and 'English', and a status indicator 'Signed in as Example Supervisor' with a 'Close' button. Below this is a blue header bar with the text 'PRACTICAL EXPERIENCE REPORTING TOOL (PERT)'. The main content area displays the report title 'First Last - Junior Accountant - Example Employer (2019-08-19 - 2020-07-19)'. Below the title are tabs for 'REPORT DETAILS', 'NOTES', 'ATTACHMENTS', and 'DECLARATION' (which is highlighted). The 'DECLARATION' section is titled 'SUPERVISOR DECLARATION' and contains two checked checkboxes with their respective text: 'Having reflected on the candidate's behaviour and performance, I am satisfied that I have responded accurately to each of the sections of this experience report.' and 'I declare I have an arm's length relationship with the student. For this purpose, arm's length is not a family member.' There is a small question mark icon next to the second checkbox. At the bottom right of the form are two buttons: 'CANCEL' (grey) and 'SAVE' (green).

Once you have completed your verification, you will get a confirmation screen.

If you have selected Disagree at any time, an email will be sent to the future CPA notifying them. They will be able to see your comments, make the changes and submit the experience report for re-verification.

Additional Information

- You only need to verify the description of duties and experiences. A CPA reviewer will evaluate the proficiency levels.
- You must complete the declaration every time, even if you have disagreed to an area in the report.
- If you disagreed with anything in the report, please explain your objections in the “Supervisor Comments” field. The future CPA will be required to make the changes and submit the experience report for re-verification.
- If your email address is a non-corporate email address, additional information will be required. The future CPA will be asked to provide this, or you may be contacted directly by the provincial/regional body to confirm the email address is valid.
- If the link has expired, please contact the future CPA. They will need to re-submit the experience report for verification.