

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.

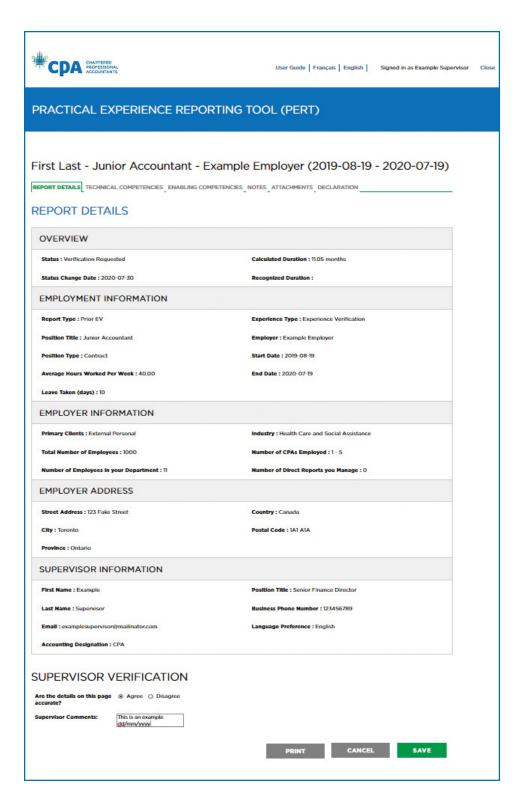
How to complete supervisor verification

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.

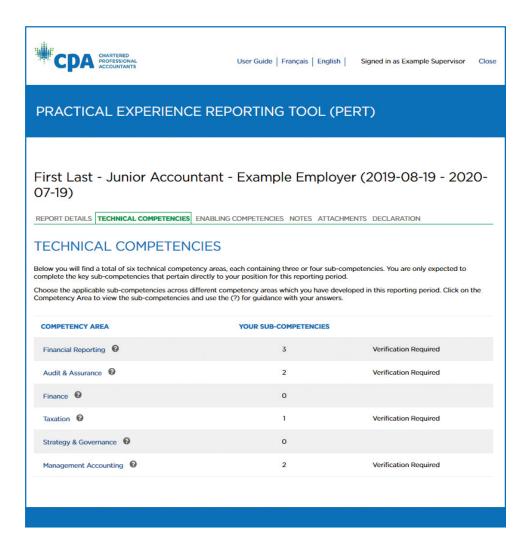
- Confirm the following is correct:
 - Start and end dates
 - Position title
 - Average hours worked per week
 - Leave taken
 - » A leave taken is defined as time away from work for any reason, including vacation, sickness, professional development, or study time.
 - Employer address
 - Employer information
 - 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.



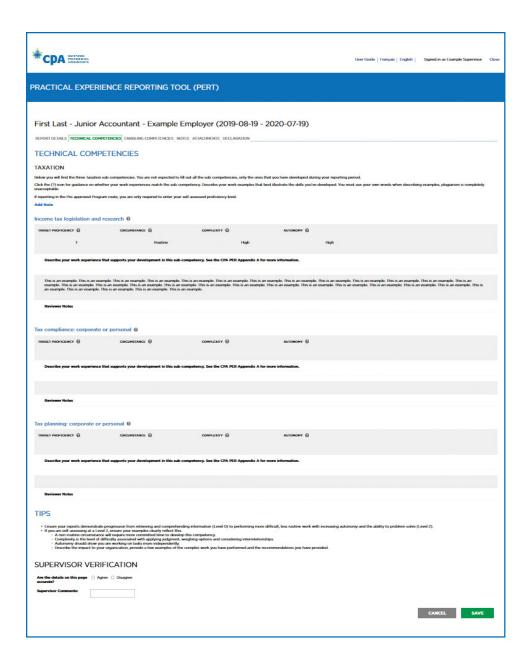
• Navigate to the *Technical Competencies* tab.

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.



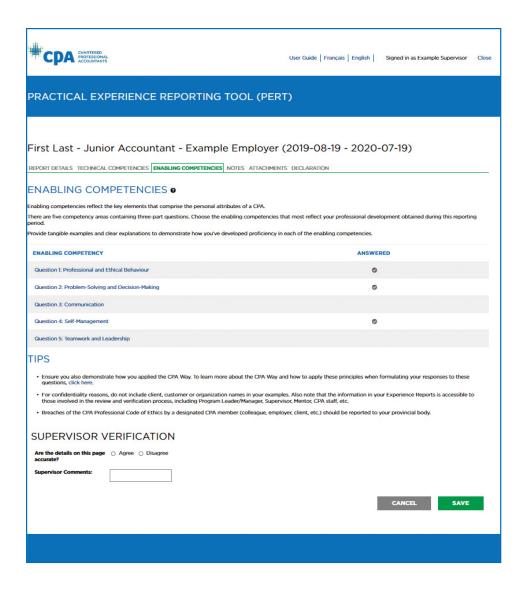
- Confirm the work experience provided is detailed, comprehensive and properly represents the experience.
- Select **Agree** if the details are correct or **Disagree** if they are not.
- Enter your comments. (If you selected Disagree, please indicate what changes are required).
- · Click Save.
- Repeat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



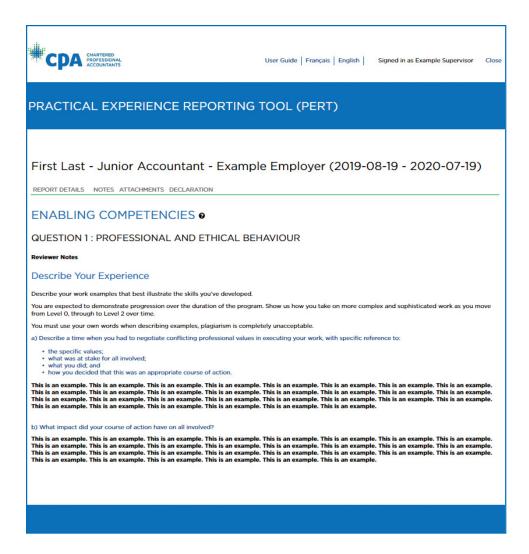
• Navigate to the Enabling Competencies tab.

Here you can see a list of the enabling competencies. If an enabling competency question has been answered, you will see a confirmation tick.

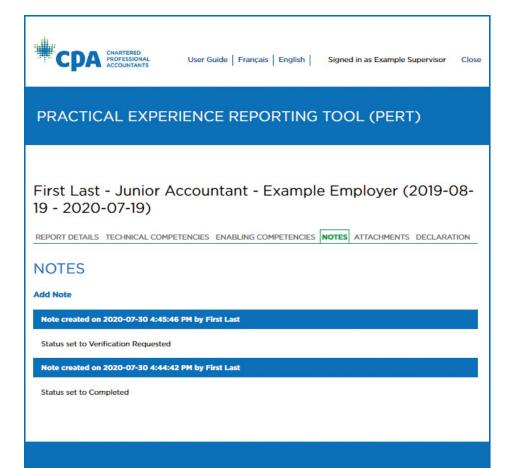
 Click on the enabling competency to view the answers (please note that if none have been answered, please still select **Agree** and **Save** to continue your verification).



- 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.



- Navigate to *Notes* tab (no verification is required here, but you can review any notes if you wish).
- · Navigate to Attachments.
 - No verification is required here, but you can review any attachments if you wish.





User Guide Français English Signed in as Example Supervisor Close

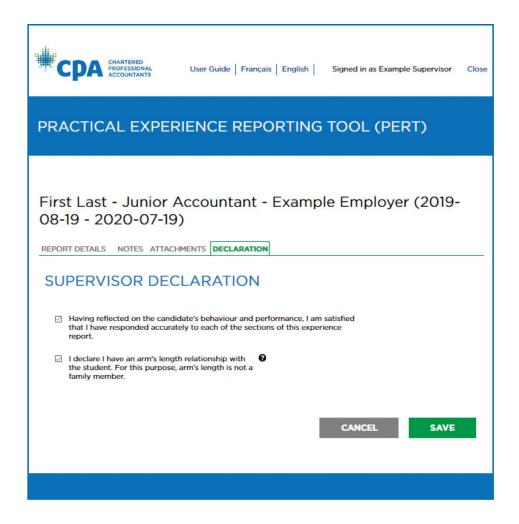
PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

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.



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.