

CPA PROFESSIONAL
EDUCATION PROGRAM

CANDIDATE GUIDE

Core and Elective Modules
Capstone 1 Module
Capstone 2 Module

Updated March 2024



A note about this guide

This is a comprehensive starting point for the following CPA Professional Education Program (PEP) modules:

- Core 1
- Core 2
- Assurance
- Finance
- Performance Management
- Taxation
- Capstone 1
- Capstone 2

Please refer to [CPA Canada's Harmonized Education Policies Vol. 1](#) for national guidelines regarding the implementation of policies for admission, administration, modules, examinations, and other policies for the CPA PEP.

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Common Candidate Guide

Program overview

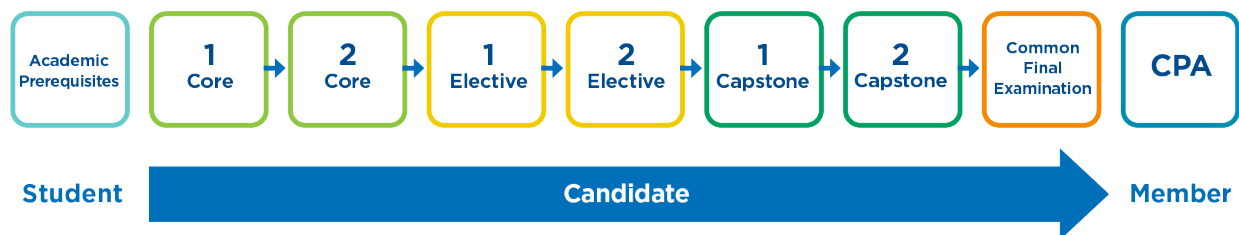
The journey to becoming a CPA has three stages: student, candidate, and member. The CPA certification program is built on three integrated pillars of education, evaluation, and experience:

- **Education:** Prerequisite education and the CPA PEP
- **Evaluation:** The Common Final Examination (CFE)
- **Experience:** Practical experience

The program is nationally developed by CPA Canada and regionally/provincially delivered. Contact information for each region/province can be found in [Appendix I](#).

CPA Canada refers to individuals at the different stages of certification as follows:

- A **student** is anyone enrolled in a program providing prerequisite courses.
- A **candidate** is anyone enrolled in the CPA PEP.
- A **member** is anyone who has met the education, evaluation, and experience requirements for CPA certification and has been formally accepted into membership by a regionally/provincially regulated CPA body.



Section 1 in Part 2 of [The CPA Competency Map](#) discusses certification and the CPA PEP in more depth.

Overview of modules

Candidates are required to complete two core modules, then two elective modules, and finally two capstone modules before attempting the CFE. Both core modules must be completed before starting the elective modules, and at least two elective modules must be completed before starting the capstone modules. Candidates may take more than two elective modules before they start Capstone 1. Capstone 1 is a prerequisite course for Capstone 2; successful completion of Capstone 2 is required before attempting the CFE.

In some regions/provinces, candidates may “fast track” the CPA PEP by taking both core modules at the same time and/or two elective modules at the same time; however, the prerequisite courses as described above remain. Section 1 in Part 2 of [The CPA Competency Map](#) discusses each of the modules in more depth.

Core and elective modules

The core modules focus on building the enabling and the technical competencies required of a professional accountant. After completion of the two mandatory core modules, candidates will choose two elective modules which allow them to explore a field of their choice.

Detailed information about the delivery of the core and elective modules is provided in the [Core and Elective Candidate Guide](#).

Capstone modules

In the capstone modules, candidates learn about team and self-management and how to communicate in a professional environment. These modules also deepen candidates' strategic competencies using the knowledge they have acquired in the prerequisites and earlier modules as they prepare to attempt the CFE. No new technical competencies are introduced in the capstone modules.

Capstone 1

Capstone 1 focuses on applying existing knowledge across all competency areas and on further developing candidates' enabling skills.

Capstone 1 combines individual and teamwork, supported by written activities and oral presentations.

Detailed information about the delivery of the Capstone 1 module is provided in the [Capstone 1 Candidate Guide](#).

Capstone 2

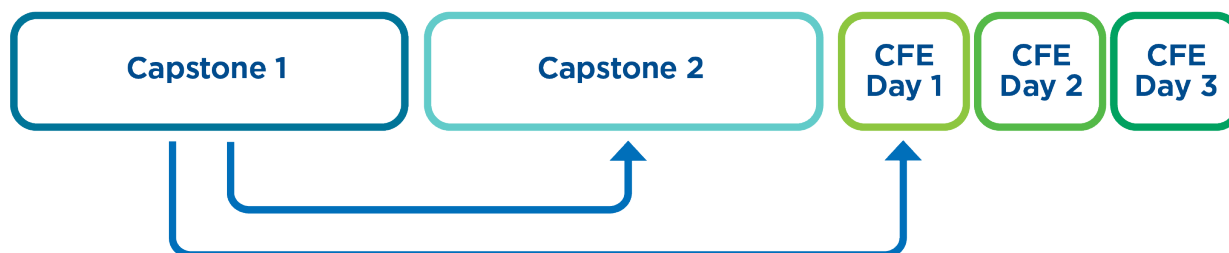
Capstone 2 is the CFE preparation module and is the last module in the CPA PEP. Capstone 2 focuses on preparing candidates for entry into the profession by requiring candidates to apply the competencies acquired throughout the CPA program in unique, complex, and highly integrative cases.

Detailed information about the delivery of the Capstone 2 module is provided in the [Capstone 2 Candidate Guide](#).

Timing of Capstone 1, Capstone 2, and the CFE

The case used in Capstone 1 changes for each offering of Capstone 1. The Day 1 practice cases in Capstone 2 and Day 1 of the CFE are linked to the Capstone 1 case.

If you take Capstone 1 and Capstone 2 consecutively leading up to the CFE, the Day 1 practice cases in Capstone 2 and Day 1 of the CFE will be based on your Capstone 1 case. The graphic below shows this relationship between the cases in the capstone modules and the CFE.



It is **strongly** recommended that you consider Capstone 1, Capstone 2, and the CFE as one integrated package and therefore take Capstone 1 and Capstone 2 immediately leading up to the CFE to ensure consistency of the cases. If you choose to take Capstone 1 and plan to delay Capstone 2 and the CFE, you will need to wait one year after your Capstone 1 session to write the same Capstone 1 case in Capstone 2 and the CFE. First time CFE writers must write the Day 1 CFE case offered in their Capstone 1 module, provided it is offered on the CFE they plan to write. See below for a listing of Capstone 1 cases and when they are tested on the CFE:

The Capstone 1 cases are:

- Kingsdale Tea Inc. — introduced in the January 2023 Capstone 1 module
- J.R. Pets Inc. — introduced in the May 2023 Capstone 1 module
- Neptune Point Fisheries Inc. — introduced in the January 2024 Capstone 1 module
- Amuzu Parks Inc. — introduced in the May 2024 Capstone 1 module

Capstone 1 case names for 2025 will be available in late October 2024.

For the May 2024 CFE, the following Day 1 cases will be tested:

- Neptune Point Fisheries Inc. (version 1)
- Kingsdale Tea Inc. (version 2)

For the September 2024 CFE, the following Day 1 cases will be tested:

- Amuzu Parks Inc. (version 1)
- J.R. Pets Inc. (version 2)

The graphic below shows the Capstone 1 cases and when each version of that case will be offered on the CFE.

Capstone 1 case	2023 CFE		2024 CFE	
	May	Sep	May	Sep
Kingsdale Tea Inc.	v1		v2	
J.R. Pets Inc.		v1		v2
Neptune Point Fisheries Inc.			v1	
Amuzu Parks Inc.				v1

There are specific implications for repeat CFE writers. In these instances, candidates should reach out to their regional/provincial contacts in [Appendix I](#) for more information.

Learning management system

Desire2Learn (D2L) is the learning management system used to deliver the CPA PEP. Each module will be delivered within D2L.

Technical requirements

Required hardware

- A personal computer (PC, Apple, or tablet computer)
- 8 GB minimum of RAM
- 1.5 GB of free hard-drive space
- Webcam may be required depending on the delivery requirements of your region/province, which will be communicated to candidates directly

Required software

- Microsoft Word, Excel, and PowerPoint or similar software. Candidates must be able to view AND generate the following file types:
 - .doc/.docx
 - .xls/.xlsx
 - .ppt/.pptx
- Power BI — a Windows operating system is required to run Power BI
- JavaScript enabled
- Cookies enabled
- Adobe Acrobat Reader or other PDF reader software

General requirements

- Sound card with speakers or headphones (modules may contain audio that requires headphones or speakers)
- Internet access; high speed strongly recommended
- One of the following internet browsers:
 - Firefox (latest version)
 - Chrome (latest version)
 - Microsoft Edge (latest version)

Access

You will receive an automated email once your D2L account has been created, and each time you are enrolled in a module within D2L. The email will contain instructions for login and access. You will continue to have access to your modules and their content until you pass the CFE.

Time zone

You can set your time zone based on your location. This allows you to view the due dates in your local time zone. All CPA PEP deadlines are stated in Pacific Time (PT). The time zone feature does not change the due dates; instead, it converts them to a particular time zone.

For example, if you are in Calgary, you would update your time zone to Mountain Time. For a deadline of Friday night at 11:55 p.m. Pacific Time, your calendar and dropbox would show Saturday at 12:55 a.m. Mountain Time. Saturday 12:55 a.m. Mountain Time is equivalent to Friday 11:55 p.m. Pacific Time.

Instructions on how to change your time zone are provided within your module in the getting started checklist.

Email

D2L has an internal email feature that you can use to contact other D2L users. The email works only within D2L. It cannot email external email addresses, nor can external email addresses send emails to the D2L email address.

You can enable D2L to forward internal D2L emails to an external email account so that you are notified of new emails. **You cannot reply to the forwarded emails from your external email account.** These emails will not be received by the recipients.

Instructions on how to enable your D2L email forwarding settings are provided within your module in the getting started checklist.

Discussion board

You may post questions about the technical content of the module material to the discussion board. The discussion board is monitored by the lead facilitator(s). Questions of a personal nature should be emailed to your facilitator (not applicable for Capstone 2).

The goal of the discussion board is to:

- Allow for efficient and consistent information flow to candidates
- Benefit all candidates with learning opportunities
- Provide for candidate-to-candidate interaction

The discussion board will be available from the first day of the module until the module exam. Once the exam begins, the discussion board is locked and no further postings can be made. The postings will still be visible after the exam for candidate reference.

Here are some best practices you should follow when you post to the discussion board:

- Before you post to the discussion board, first check to see if your question has already been asked. You can do so by searching keywords using the search function on the discussion board.
- The tone of discussion board postings should be professional.
- There is no need to say “thank you” after receiving a reply to your post. While this is polite and appreciated, it creates unnecessary posts.
- While lead facilitators will respond on the discussion board, the discussion board is not monitored by those who develop the eBook and module curriculum. Candidates are encouraged to provide any feedback about the program and module format to CPA Canada via the surveys. This ensures that those responsible for making changes to the program receive your valuable feedback.

Instructions on how to set up your discussion board notifications and subscription settings are provided within your module in the getting started checklist.

Candidate resources

Candidates have access to several resources during the CPA PEP.

Facilitator

A facilitator's role is to coach candidates throughout the module, review submissions and provide feedback, and help candidates with any questions they have. Note that there is no facilitator for Capstone 2 because candidate responses are marked by the CPA Canada National Marking Centre, where applicable. Each candidate is assigned to a facilitator. Facilitators will email candidates at the start of the module to introduce themselves. Email (within D2L) is the mode of communication between facilitators and candidates. To ensure privacy and security, facilitators will not provide other email addresses or telephone numbers. Direct communication with facilitators should not occur outside of D2L for the duration of the module. Candidates who attempt to communicate with their facilitator outside of D2L through other channels (for example, sending a direct message on a social networking platform, such as LinkedIn) will not receive a response from their facilitator.

Facilitators are required to respond to candidate emails within 24 hours. If your facilitator has not replied to your email within 24 hours, please contact your region/province using the information in [Appendix I](#).

Candidates are not permitted to email their facilitator to “pre-review” a submission before the deadline. The facilitator is a designated CPA and acts as a coach, meant to support candidates and assess their level of competency based on submitted activities. However, the facilitator does not decide whether a candidate succeeds in a module.

CPA Canada is dedicated to a quality learning experience for all candidates and encourages candidates to email their facilitator if they are unsatisfied with the quality of their learning experience. If you are unable to resolve difficulties with your facilitator, email your region/province using the information in [Appendix I](#).

Lead facilitator(s)

Lead facilitators are designated CPAs who monitor and facilitate discussions on the discussion board. They are subject matter and policy matter experts, and they will help candidates with their questions on technical concepts covered in the module.

Session leader

Session leaders are designated CPAs who guide the two-day workshops within the module. Session leaders are only available to candidates during the two-day workshops. To ensure privacy and security, session leaders will not provide other email addresses or telephone numbers. Direct communication with session leaders should not occur outside of the two-day workshop for the duration of the module. Candidates who attempt to communicate with their session leader outside of the workshop through other channels (for example, sending a direct message on a social networking platform, such as LinkedIn) will not receive a response from their session leader.

Regional/provincial contacts

The regional/provincial contacts are available to you throughout the CPA PEP. You should contact your region/province for the following:

- Module registration and withdrawals
- Workshop location and administration questions
- DiSC profile assessments (if applicable)
- Questions about accommodations for medical reasons or disability
- Extension requests
- Exam location and administration questions
- Additional support and resources not listed in this guide

Your region/province can be reached using the contact information in [Appendix I](#).

Curriculum resources

Introduction to the PEP module

Introduction to the PEP is an optional module that provides you with valuable resources. All candidates are enrolled in Introduction to the PEP.

The resources within the Introduction to the PEP module include, but are not limited to:

- PEP orientation materials for new and transitional candidates
- Core and Elective module syllabi
- Module-specific technical reviews that include the following resources:
 - A custom study plan based on a candidate's availability to study
 - Diagnostics that evaluate a candidate's proficiency on technical topics in the module to pinpoint areas requiring further study
 - Recommended eBook chapters for each unit, with accompanying knowledge check practice questions
 - Tailored adaptive reviews that reinforce learning and provide candidates with an opportunity for additional practice
 - A question bank for candidates to attempt additional practice questions
- A case-writing tutorial
- Diversity, equity, and inclusion training
- Module and exam resources

The CPA Canada Competency Map

[The CPA Competency Map](#) is a guide to understanding the competencies a candidate must demonstrate to become a CPA. Candidates are responsible for prerequisite knowledge as outlined in this document. Candidates should use this document to understand what concepts are examinable. Details about how to use *The CPA Competency Map* are located within the document.

Knotia

Knotia is CPA Canada's research platform for insights into accounting, assurance, and taxation matters. Through Knotia, candidates will have access to the following subscriptions:

- CPA Canada Standards and Guidance Collection (exam reference)
- Excise Tax Act (exam reference)
- Federal Income Tax Collection (exam reference)

If you experience any issues with your Knotia account, please contact the CPA Canada Customer Service Department at 1-800-268-3793 or member.services@cpacanada.ca.

The CPA Canada Learning Library (eBooks)

The eBooks cover technical and enabling competencies and consist of several volumes. The eBooks are not meant to be a comprehensive representation of [The CPA Competency Map](#); rather, they are a tool to help candidates in their studies. Note that the eBooks are not provided for reference on the examinations. Refer to [Appendix VIII](#) for instructions on how to access and print the eBooks.

Exam resources

Candidates will have access to several exam resources within their module. National exam-related information can also be found on the [CPA Canada website](#).

IT Helpdesk

Direct any technical issues to the [CPA Canada IT Helpdesk](#). For the timeliest resolution of your issue, contact the CPA Canada IT Helpdesk instead of your facilitator or lead facilitator(s), as they are not trained to help with hardware or software issues.

Academic and professional policies

The CPA PEP is a graduate-level accounting designation program. As such, candidates are to familiarize themselves with policies on appeals and conduct, which they are responsible for knowing to be successful in the program.

Conduct

CPAs must abide by a code of conduct, are required to participate in lifelong professional development, and are subject to uniform standards of entry into the profession.

Using the CPA designation

Before passing the CFE and being formally accepted into membership by a regionally/provincially regulated CPA body, candidates may not, under any circumstances, use the designation “CPA” or any other title suggesting that they are Chartered Professional Accountants. Refer to the regional/provincial guidelines on the use of titles for candidates.

Professionalism

How members and candidates act reflects on the CPA designation and affects the level of respect the profession receives. Candidates taking CPA PEP modules are expected to behave professionally. Refer to the [CPA Harmonized Education Policies Vol. 1](#) and the training contract that you signed with your regional/provincial body.

Code of ethics

CPA Canada represents highly qualified professionals who demonstrate an ongoing commitment to providing the highest standards of accounting, ethics, and best business practices. As such, CPA Canada takes violations of ethics very seriously. As stewards of the public trust, students, candidates, and members are expected to maintain a high level of integrity and ethical standards.

All candidates and members are required to abide by their regional/provincial act, bylaws, and the Code of Ethics. Those who do not abide by the Code of Ethics may be subject to the disciplinary process and have their registration removed.

Academic integrity

During their studies in the CPA certification program, candidates are expected to maintain the highest standards of academic integrity. While each module has some of its own unique requirements and standards, academic integrity applies equally to all candidates. Plagiarism — the unauthorized and/or uncredited use of others’ intellectual property — is considered a serious offence and may result in penalties, as noted below. There is likewise a no-tolerance policy toward cheating of any sort. Candidates are expected to conduct their studies with professionalism and integrity. Where there is any doubt, candidates should contact their region/province for guidance.

Use of generative artificial intelligence

Candidates are encouraged to read the policy on [Academic Integrity and the Use of Artificial Intelligence \(AI\)](#). This policy explains how generative AI can be used appropriately by learners. An example of a generative AI platform is ChatGPT.

Plagiarism

Plagiarism, in any form, is considered a serious offence. All cases of suspected plagiarism will be investigated, are taken very seriously, and will have significant consequences that will impact the educational journey and possibly the careers of the individuals involved. Candidates are reminded that they are expected to maintain the highest standards of academic integrity at all times. These standards should be demonstrated when candidates complete their coursework, write exams, and report practical experience. Ultimately, it is each candidate's responsibility to ensure they do not commit an act of plagiarism.

Plagiarism explained

Plagiarism includes (and is not limited to) whenever a candidate:

- Presents work that has been written in part or in whole by another person
- Presents the words, images, or data of another person as the candidate's own, without reference to the original author or the original source (that is, does not give credit to the original author or source)
- Presents work that, in any way, compromises the integrity of the evaluation process
- Presents work that is substantially similar to another person's work
- Presents work that contains any portion of the CPA solutions or feedback guides in the examinations or activities
- Presents work that contains any portion of the CPA Canada Learning Library (eBooks), without reference to the original source
- Shares CPA program files or templates with others (see training contract)
- Purchases or acquires work that has been written in part or in whole by another person and presents it as the candidate's own

In addition, CPA Canada defines plagiarism to include to use of materials posted to study resource websites or platforms such as, but not limited to, Course Hero, Chegg, OneClass, Quizlet, WhatsApp groups, Kijiji, etc. Any instance of use of these types of materials will be flagged by our plagiarism-detection software and subject to investigation. The posting of content to these websites or platforms before, during, or after a candidate's enrolment in the program/module enables plagiarism and will be investigated and subject to the same penalties as plagiarism. If candidates have posted to websites and platforms, it is recommended their content be removed immediately.

However, candidates are encouraged to use the module discussion board as a platform to collaborate with their peers before composing their own responses. Collaboration can include:

- Discussing technical topics
- Identifying potential resources for further research

- Discussing a general approach to activities

Collaboration does not involve sharing files or templates with peers. This would be considered enabling plagiarism. Unless explicitly stated otherwise, candidates are expected to compose their responses to module activities independently (or with their team members in Capstone 1).

Plagiarism detection

Each region/province has the right, at its sole discretion and without specific notice to candidates, to use active or passive techniques to detect plagiarism. This includes, but is not limited to, comparative analysis of written submissions in hard copy or electronic form. This analysis can be done by human reviewers or by using plagiarism-detection software that searches a comparative databank of written submissions from other current candidates or program years, program articles, or internet-based resources.

Plagiarism consequences

Plagiarism and cheating are serious offences and are considered to be a breach of the Code of Professional Conduct, as governed by the profession's discipline committees. Candidates are expected to familiarize themselves with and conform to the standards noted in the CPA Canada Plagiarism Policy and the Code of Professional Conduct on their regional/provincial website. Those found guilty of plagiarism are subject to penalties and consequences that may include, but are not limited to, the following:

- The finding being noted in the candidate database
- A mark of "fail" in the course/module
- A committee hearing to determine good character
- Enrolment in an ethics course
- Suspension or expulsion
- Suspension of registration and eligibility to continue pursuing designation

The regional/provincial body responsible for investigating plagiarism also has the right to issue additional penalties or contact other regulatory bodies as required.

Any questions regarding the CPA Canada Plagiarism Policy should be directed to your regional/provincial body using the contact information in [Appendix I](#).

Appeals

Below is a discussion of the various appeals within the CPA PEP. All contact information regarding appeals for your region/province can be found in [Appendix I](#).

Appeal of module results

Candidates should expect a high level of fairness, professionalism, and objectivity in the CPA certification program. The appeals process is designed to handle concerns

candidates raise. The intent of the process is to ensure fairness and clear communication.

All appeals related to program policies must be made in writing, and each appeal must clearly state that it is a letter of appeal. The stronger the submission, the greater the likelihood that it will be favourably considered. To make an appeal stronger:

- Include an explanation and appropriate supporting documentation, where applicable, if there were extenuating circumstances that kept you from meeting the requirements or established policies.
- Avoid making general statements such as “I will work harder.” Identify the issue or weakness that created the situation, and clearly outline what changes are required and that you will undertake should your appeal be successful.

The applicable regional/provincial body, in line with its established processes and/or bylaws, will consider appeal submissions. If the appeal is of a confidential nature, any individuals involved in the review are bound by privacy policies. An appeal decision can be expected within six weeks of submission, unless additional information is requested from the candidate. Any other reasons for a delay beyond this time frame will be communicated in writing.

Appeal of fees

Issues with payment and refunds, as per the approved and published schedules, are not appealable. In the case of hardship, contact your regional/provincial body to discuss resources that may be available or alternate arrangements that may be considered. In some situations, a written appeal may be directed to the provincial/regional body for review.

Appeal relating to ethics and conduct

Ethical issues such as cheating or plagiarism will first be dealt with by the candidate's regional/provincial body. Depending on the nature of the situation, and/or in line with regional/provincial requirements, the matter may have to be forwarded to the individual responsible for ethical issues. Any reported instances of plagiarism may result in disciplinary action according to the standards/policies of your regional/provincial body. Candidates may submit an appeal of the decision for consideration by the appeals committee, and they will be notified of the results in writing. Candidates will be responsible for any costs of the appeal.

For ethical issues that relate to workplace or professional conduct, the regional/provincial committee for disciplinary action will consider the matter.

Appeal of exam results (remark)

For a fee, candidates may appeal exam results after each module exam, up until three business days after the results are released for the exam in question. Candidates must

use the guidelines in the [CPA Harmonized Education Policies Vol. 1](#) to appeal their results.

CPA Canada will not accept appeals of grades regarding subject matter from previous exams or related to issues from before the exam for which the appeal has been submitted. Candidates may not appeal on the basis of changes to the program or the program's curriculum based on previous offerings of the program.

Managing your program

You should be familiar with how to make changes to your program.

Personal information changes

You are responsible for notifying your regional/provincial education body (see [Appendix I](#)) when circumstances change, such as the following:

- Address change
- Employer change
- Name change

Enrolling in a module

To enrol in a module, you must be registered with the appropriate program in a Canadian region/province, usually the one in which you are living. You can enrol by visiting your regional/provincial site for specific instructions. Direct any questions about the registration process to the contacts in [Appendix I](#).

Voluntarily withdrawing from a module

If candidates choose to withdraw from a module, they can withdraw by contacting their regional/provincial body using the information in [Appendix I](#).

You may or may not be given a refund or charged an attempt for the module when you withdraw. This depends on when you withdraw. Refer to the [CPA Harmonized Education Policies Vol.1](#) for policies related to withdrawing from a module.

Please note that a “module attempt” means an attempt at a module and/or the module exam. In all cases, if you re-enrol in a module after withdrawing from an earlier offering, you will need to restart the module from the beginning.

Module fees and annual dues

Module fees are required in full at the time of enrolment. To maintain status as a CPA candidate, you are also required to pay annual dues, set by your regional/provincial body.

Important dates

The program schedule lists the module enrolment dates, module start and exam dates, workshop dates, and the dates that results are released. You are encouraged to check you regional/provincial website for key dates.

Accommodations and extensions

Extenuating circumstances sometimes make it difficult for candidates to complete their module activities or attend a workshop in its entirety. CPA Canada has certain procedures in place to deal with these situations.

Extensions: Module activities

Late submissions will not be reviewed and will not receive feedback. However, in extenuating circumstances, candidates may request an extension. To request an extension, contact your region/province using the information in [Appendix I](#). Facilitators do not have the authority to grant extensions or assess the likelihood of an extension being granted. Workload or lack of internet connection are not usually considered extenuating circumstances.

Accommodation: Module workshop

Candidates are expected to attend the entire workshop and participate. If you arrive late or miss part of the session, you may be ineligible to proceed in the module and an attempt may be charged.

In extenuating circumstances, candidates may request permission to arrive late or miss the workshop. In most cases, candidates who are granted an exemption will be expected to complete a series of make-up activities called an accommodation workshop. Candidates may be charged a fee for the accommodation workshop. If candidates do not attend the workshop or do not complete the accommodation workshop, they will not be allowed to successfully complete the module. To request an accommodation, refer to the contact information for your region/province in [Appendix I](#).

Academic accommodations

If candidates have a religious or medically documented reason or disability that affects their participation in the module activities, workshop, or ability to attempt the module exam as scheduled, they can request an academic accommodation. Such candidates will need to provide appropriate supporting documentation and may be asked to provide additional information. To request module or exam accommodations, see [Appendix I](#).

If candidates are seeking a religious accommodation for a workshop, contact your region/province using the contact information in [Appendix I](#).

Core and Elective Candidate Guide

This section of the Candidate Guide is designed to provide key information pertaining to the administration and delivery of the core and elective modules. If there is guidance provided in this section that conflicts with information provided in the [Common Candidate Guide](#), please use the information contained within this section as the authoritative guidelines for the core and elective modules.

Additional information or answers to any questions not addressed here should generally be directed to the following resources, in this order:

1. The [Common Candidate Guide](#)
2. The module discussion board
3. Your facilitator
4. Your region/province

Module format

Each core and elective module contains eight units and a module workshop. Core 1 also includes an orientation workshop. Each [module's syllabus](#) outlines the composition of the module and technical topic coverage. The submission deadlines for each activity can be found within D2L.

Getting started

Once candidates are given access to their module in D2L, they will complete a getting started checklist, familiarize themselves with the module and exam resources, and prepare for the orientation workshop (Core 1 only).

Workshops

Candidates will attend a mandatory two-day module workshop for each core and elective module. Core 1 also includes an orientation workshop that occurs at the beginning of the module. The timing of the module workshop varies from module to module. Refer to your regional/provincial calendar for workshop dates.

Prior to the workshop, candidates are required to complete pre-work and make any submissions to the dropbox (where applicable) by the stated deadline.

During the workshops, candidates will engage in several activities led by a session leader. Candidates may be asked to show their government-issued photo identification at the workshop. Attendance at the workshop(s) is mandatory, and active participation in the workshop is expected.

Your region/province will provide you with logistical details as they relate to your workshop(s).

After each workshop, candidates will provide their feedback on their experience in a workshop session leader evaluation survey and a workshop survey. Both surveys are required to be completed by the stated deadline to receive grades for completion.

Units

Candidates will work through eight units to complete each module. Within each unit, candidates will be presented with the approximate time to complete the activities listed in the unit. The timing is an estimate and does not account for time spent reviewing prerequisite knowledge. The times noted are for an average candidate who has the prerequisite proficiency levels outlined in [The CPA Competency Map](#) for the technical topics in that module.

Each unit is made up of a series of steps that contain the following activities, as applicable.

eBook – Technical review

First, you will perform a technical review with the eBook. A number of eBook chapters are recommended for each unit. Each chapter includes a snapshot, written instruction, examples, e-lessons on select technical topics, summary problems, and practice multiple-choice questions (MCQs), as applicable.

Each module's technical review includes the following resources:

- A custom study plan based on a candidate's availability to study
- Diagnostics that evaluate a candidate's proficiency on technical topics in the module to pinpoint areas requiring further study
- Recommended eBook chapters for each unit, with accompanying practice MCQs
- Tailored adaptive reviews that reinforce learning and provide candidates with an opportunity for additional practice
- A question bank for candidates to attempt additional practice questions

Chapters that are commonly tested in the module are noted for candidates. Note that the technical review is a study resource, and any activities included within the technical review are not graded. Refer to the instructions provided in [Appendix VIII](#) for further information on how to use the technical review and eBooks.

The four hours allocated to the technical review with the eBook for each unit is an estimate and does not account for time spent reviewing prerequisite knowledge. The time allocated is based on an average candidate who has the prerequisite proficiency levels outlined in [The CPA Competency Map](#).

The study plan in the technical review assumes that a candidate will be completing all recommended chapters in a unit, including the practice MCQs. The time spent reviewing by each candidate will vary depending on their level of proficiency with the topics covered. Candidates are not expected to cover all material contained within the

technical review. This would take significantly longer than the four hours allotted to the technical review with the eBook step in each unit.

Unit quiz

After the eBook technical review, you will test yourself with a unit quiz in D2L. The quiz consists of MCQs that have been selected to test your understanding of the technical topics covered in the unit and is assigned for completion before the stated deadline. The first attempt on the unit quiz (prior to the deadline) will be graded. MCQs can be attempted, saved, and returned to at any time up until the submission deadline. Once a first attempt on the quiz is submitted, no further changes can be made to that attempt for grades. Any subsequent attempts will not impact a candidate's overall module grade and are for practice only.

After completing the quiz, you will receive automated feedback for debrief. The quiz will remain available after the deadline for practice.

Webinar

Optional webinars are provided in each unit for Core 1 and Core 2. They cover a variety of key technical topics and provide strategies for success in the program.

Integrated problem

For each unit, you will apply what you have learned with an integrated problem. The integrated problems draw from the technical topics covered in the unit and provide you with an opportunity to practise applying technical knowledge in an integrated manner.

The integrated problem is assigned and must be submitted before the stated deadline. Upon submission, you will receive the solution and debrief materials for self-debrief. If no submission is made, the solution and debrief materials will release after the deadline has passed.

Your facilitator will return feedback on your submission by uploading a completed feedback guide within 96 hours of the submission deadline (48 hours in Unit 8). Once you receive your facilitator feedback, you will perform a second debrief.

Practice case

In each unit, you will write and debrief a practice case. The practice case provides you with an opportunity to hone your case-writing skills and apply technical knowledge that you have learned in a 60-to-120-minute scenario.

The practice case is designed to be written in exam-like conditions within the suggested time noted on the case. For strategies on how to write a practice case, refer to the case-writing tutorial within the Introduction to the PEP module. Each practice case has a word count limit. If you submit a practice case that has exceeded the word count, the portion of your response that exceeds the limit will not be marked by your facilitator.

The practice case is assigned and must be submitted before the stated deadline. Upon submission, you will receive the solution and debrief materials for self-debrief. If no submission is made, the solution and debrief materials will release after the deadline has passed.

Your facilitator will return feedback on your submission by uploading a completed feedback guide within 96 hours of the submission deadline (48 hours in Unit 8). Once you receive your facilitator feedback, you will perform a second debrief.

Retired exam case/set

The retired exam cases are actual cases that were included on past module exams. Writing the retired exam cases is optional; however, you are strongly encouraged to write the case for practice under time-constrained exam conditions. A complete retired exam set is provided in Unit 8, and retired exam cases are provided for a select number of units.

Surveys

In Unit 8, you will be prompted to provide feedback on your experience in the module in a facilitator evaluation survey and a module survey. Both surveys are required to be completed by the stated deadline to receive grades for completion. Your feedback is valuable and is reviewed by the national curriculum staff and your regional/provincial body.

Learning materials

Below is a summary of learning materials specific to each module:

Material	Purpose
CPA Canada Learning Library (eBooks) and technical review	The eBooks include written instruction, examples, e-lessons on key technical topics, summary problems, and practice MCQs, as applicable. The technical review is a study resource specific to your module that contains a custom study plan, diagnostics, recommended eBook chapters and knowledge check practice questions, adaptive reviews, and a question bank.
Unit quizzes	A quiz consisting of MCQs to test your understanding of technical topics. Automated feedback is provided.

Material	Purpose
Webinars (core modules only)	Your region/province may host one-hour live webinars on technical and/or enabling competencies. Attendance at the webinars is optional but highly encouraged, where applicable. Pre-recorded webinars are available for all candidates.
Integrated problems	<p>Integrated problems provide you with an opportunity to practise applying technical knowledge in an integrated manner.</p> <p>Include debrief materials, such as complete PDF and Excel solutions (if applicable) and feedback guides to self-assess performance.</p>
Practice cases	<p>Practice cases for honing your case-writing skills and applying technical knowledge in a time-constrained scenario.</p> <p>Include debrief materials, such as complete PDF and Excel solutions (if applicable), feedback guides to self-assess performance, annotated practice cases that explain how to use and organize the facts in the case, and sample candidate responses with an accompanying completed feedback guide.</p> <p>Note that practice case feedback guides are provided in the core and elective modules to assist with debriefing. They are not intended to mimic the marking guides used by the CPA Canada Evaluations group.</p> <p>For core modules and a select number of cases in the elective modules, debrief videos are provided to explain how to approach the case and provide case-writing tips and techniques.</p>

Material	Purpose
Retired exam case(s) and retired exam set	<p>Actual exam case(s) provided for additional practice, including solutions and feedback guides.</p> <p>An actual complete exam set provided for additional practice (includes cases and MCQs), including solutions and feedback guides.</p> <p>The feedback guides are provided to assist with debriefing. They are not intended to mimic the marking guides used by the CPA Canada Evaluations group. Note that retired exam feedback guides do not contain prescriptive levels and candidates are encouraged to self-assess using the assessment opportunity level descriptions provided.</p>
Data analytics activities (Core 2 and electives only)	Optional data analytics activities, including solutions and feedback guides.

Submitting activities

Quizzes

Once all questions in the quiz have been answered, click “Submit Quiz” to submit your quiz attempt.

Surveys

Plan to complete each survey in one sitting. Once all questions have been answered, click “Submit Survey” to send your feedback to CPA Canada. You must click “Submit Survey” to complete your survey attempt.

Integrated problems and practice cases

File submission format

All integrated problem and practice case submissions, unless noted otherwise, must be drafted in one Word and/or one Excel file. The memo should be drafted in Word, and the calculations (if any) should be drafted in Excel. This means that all activities for an integrated problem or practice case will be submitted in one Word file and/or one Excel file. Candidates are encouraged to use page breaks in Word and separate tabs in Excel to organize their responses in a professional manner. Unless otherwise stated, no other file formats (including PDF files) are accepted.

Responses must:

- Be in Arial, Calibri, or Times New Roman 12-point font
- Be single spaced
- Have 1" margins

Files must be named with the following convention:

- LastnameFirstname-XX#, where # is the unit number, and XX is one of the following:
 - MW for module workshop pre-work
 - IP for integrated problem
 - PC for practice case

The file extension after the name will be either .doc or .docx for a Word file, and .xls or .xlsx for an Excel file. Files that are not formatted as stated above may require resubmission.

Submitting to the dropbox

Integrated problem and practice case response files will be uploaded to the related dropbox within D2L. Refer to [Appendix IX](#) for instructions on how to submit to the dropbox. Candidates must submit documents to the correct dropbox. Only one submission is permitted. After submitting your files, you cannot make edits to them, nor can you email your facilitator with a revised file to review. **Be sure to submit your final response only.**

Note that the end date for the dropbox is visible below the dropbox folder name, and a short date format is displayed. To view the full end date and time for the dropbox, hover your cursor over the short date.

Integrated problem and practice case	
<input type="checkbox"/>	Unit 1 Integrated problem ▼ 🔑 📁 Ends Feb 3 ← • Available until Feb 3, 2024 11:55 PM Submission restricted after availability ends.
<input type="checkbox"/>	Unit 2 Integrated problem ▼ 🔑 📁 Ends Feb 9
<input type="checkbox"/>	Unit 2 Practice case ▼ 🔑 📁 Ends Feb 9

Alternatively, you can view the full end date and time by selecting the dropbox name and viewing the dropbox folder properties.

Dropbox > Unit 1 Integrated problem

Unit 1 Integrated problem

▼ Hide Folder Information

Turnitin™

This assignment will be submitted to Turnitin™.

Instructions

A reasonable attempt on an integrated problem does not include submitting a blank or unrelated response. There is no minimum score requirement.

Available until Feb 3, 2024 11:55 PM. Submission restricted after availability ends.

Full end dates and times are also visible for all assignments in the calendar tab.

Course Home Content Learning Resources Dropbox Quizzes Surveys Discussions **Calendar** Classlist Email Grades

Agenda Day Week Month **List** Print Settings Subscribe Search Events

All events

Filter By: Dropbox Checklists Discussions Events Grades Materials
Modules Quizzes Surveys

35 items shown

- Jan 26, 2024 11:55 PM
- Jan 28, 2024 4:00 PM
- Policy quiz - Availability Ends Jan 30, 2024 11:55 PM
- Academic Honesty Quiz - Availability Ends Jan 30, 2024 11:55 PM
- Unit 1 Quiz - Availability Ends Jan 30, 2024 11:55 PM

January 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Tasks

Add a task...

Late or incorrect submissions

All deadlines are quoted in Pacific Time. Facilitators will not review or provide feedback on late submissions unless an extension has been granted by your region/province.

If you have submitted incorrect files to the dropbox, you need to email your facilitator with an explanation of the issue and attach the correct files before the deadline. Facilitators are required to respond to emails within 24 hours, so it is important to email your facilitator the correct submission files, especially when the deadline is approaching.

If the facilitator does not receive the correct files before the deadline, then the submission will be considered late and cannot be accepted.

An example of an incorrect file is an integrated problem file submitted to the practice case dropbox. An incorrect file is not a revised version of a file you have already submitted (see [submitting to the dropbox](#)) or a file that was missed or damaged/corrupted in the original submission. For example, if a candidate submits a Word file and forgets to attach an Excel file, or the Excel file is damaged/corrupted, the Excel file cannot be accepted via email by facilitators. If your submission qualifies as an incorrect submission, your facilitator will delete your original submission. You will submit the same file(s) you emailed to your facilitator to the correct dropbox. Your facilitator will verify that the same files that were emailed were submitted to the dropbox.

Debriefing

Self-debrief

After submitting quizzes, integrated problems, and practice cases, candidates should complete a self-debrief of their performance.

Quizzes

Automated feedback is provided to explain why the answer selected was correct or incorrect.

Integrated problems and practice cases

The integrated problem and practice case debrief materials are made available at the earlier of submission to the dropbox or the dropbox deadline.

Feedback guide

The integrated problems and practice cases are made up of individual assessment opportunities. An assessment opportunity is a specific requirement of an integrated problem or practice case. Each assessment opportunity is further broken up into minimum proficiency indicators (MPIs).

Ref.	Minimum Proficiency Indicator (MPI) Description	CPA Way	N/P/Y	Feedback
AO1 (Financial Reporting — Long-lived asset impairment)				
1	Identifies the financial reporting issue	Situation		
2	Discusses the event or change in circumstances indicating that the asset is impaired, using case facts	Analyze		
3	Discusses that the carrying amount of the asset is not recoverable if it exceeds the sum of the undiscounted cash flows expected to result from its use and eventual disposition	Analyze		
4	Calculates the impairment loss (Yes if compares fair value to carrying amount.)	Analyze		
5	Recommends whether impairment should be recorded, consistent with the analysis	Conclude		
6	Concludes on the impact of the adjustment on the financial statements or the current ratio	Conclude		
NA	The candidate does not address this assessment opportunity.			
NC	The candidate does not meet the standards for reaching competence.			
RC	The candidate attempts to discuss the potential impairment of the long-lived asset (Yes on 2 MPIs OR Partial on 3 MPIs).			
C	The candidate discusses the potential impairment of the long-lived asset, including a conclusion (Yes on MPIs 1-5).			
CD	The candidate thoroughly discusses the potential impairment of the long-lived asset, including a conclusion, and discusses the impact of the issue on the financial statements or the current ratio (Yes on all).			

Each **MPI** (or row in the feedback guide) is rated as:

- No (N): The candidate did not attempt the MPI.
- Partially (P): The candidate attempted the MPI to some degree.
- Yes (Y): The candidate fully achieved the MPI as described.

Each **assessment opportunity (AO)** is rated as:

- Not addressed (NA): The candidate did not address this assessment opportunity.
- Nominal competence (NC): The candidate did not meet the standards for reaching competent.
- Reaching competent (RC): The candidate identifies the assessment opportunity, but the response lacks depth and/or breadth.
- Competent (C): The candidate prepares a reasonable response for the assessment opportunity.
- Competency with distinction (CD): The candidate prepares a thorough response for the assessment opportunity.

Debrief of facilitator feedback

Facilitators will review candidates' integrated problems and practice case submissions (Word and Excel files) and provide feedback in a feedback guide. **The feedback guide will be attached to the activity dropbox.**

Within the feedback guide, facilitators will rate each MPI (N, P, or Y) and each assessment opportunity (NA, NC, RC, C, CD). Candidates will receive written feedback for each AO.

Each assessment opportunity is awarded points as follows:

- Not addressed (NA) = 0
- Nominal competence (NC) = 1
- Reaching competent (RC) = 2
- Competent (C) = 2
- Competency with distinction (CD) = 2

Grades

When determining the overall grade on the module activities, the activities are weighted as follows:

Integrated problems: 30%

For each integrated problem, you are eligible for two graded components:

- **Attempt:** One point is awarded if a reasonable attempt* is submitted to the dropbox before the deadline.
- **Score:** A maximum of one point is awarded for each integrated problem, based on your actual performance across all assessment opportunities in that problem. For example, if you achieve a score of 8 out of 10 on the assessment opportunities, you will receive 0.8 points for your actual performance on the integrated problem.
- Each integrated problem is weighted evenly, worth 1/8 of 30%, or 3.75%. As such, if an integrated problem has more tasks (or more assessment opportunities), more “points” are not available.

*** A reasonable attempt on an integrated problem does not include submitting a blank or unrelated response. There is no minimum score requirement.**

Practice cases: 30%

For each practice case, you are eligible for two graded components:

- **Attempt:** One point is awarded if a reasonable attempt* is submitted to the dropbox before the deadline.
- **Score:** A maximum of one point is awarded for each practice case, based on your actual performance across all assessment opportunities in that case. For example, if you achieve a score of 6 out of 10 on the assessment opportunities, you will receive 0.6 points for your actual performance on the practice case.
- Each practice case is weighted evenly, worth 1/8 of 30%, or 3.75%. As such, if a practice case has more assessment opportunities, more “points” are not available.

*** A reasonable attempt on a practice case is defined as writing the response under exam-like conditions, without submitting a blank or unrelated response, or**

using additional time or resources. There is no minimum score requirement. It is recommended that candidates aim to provide their response within the recommended time frame and under exam-like conditions to receive the most valuable feedback from their facilitator.

Quizzes, surveys, and module workshop pre-work (where applicable): 30%

Unit quizzes

For each quiz, you are eligible for two graded components:

- **Attempt:** One point is awarded if a reasonable attempt is submitted before the deadline.
- **Score:** A maximum of one point is awarded based on your actual performance in the quiz, which is the number of questions answered correctly divided by the total number of questions in the quiz.

Note that the gradebook will be populated within 96 hours of completion.

Academic integrity quiz, policy quiz, and module workshop pre-work (where applicable)

One point is awarded if a reasonable attempt is submitted before the deadline.

Surveys

One point is awarded if a pair of surveys is completed and submitted before the deadline. The following surveys must be completed together to earn one point in the gradebook:

- Orientation workshop session leader evaluation survey **and** orientation workshop survey (Core 1 only)
- Module workshop session leader evaluation survey **and** module workshop survey
- Facilitator evaluation survey **and** module survey

For example, a candidate must complete the module workshop session leader evaluation survey **and** the module workshop survey to receive one point in the gradebook — otherwise, the grade is 0, even if one survey has been completed.

Note that the gradebook will be populated within 96 hours of completion.

Module workshop participation (includes the orientation workshop; 5% for each workshop in Core 1 only): 10%

- Attendance at each module workshop is mandatory. In addition to this, 10% of the overall module grade is available for participation and behaviour during the workshop. One point will be awarded to those who attend the workshop and act and participate in a professional, respectful, and courteous manner. Candidates will receive either zero or one point on their participation; there are no part marks for

workshop participation. When candidates are consistently disrespectful to others attending the workshop or are disengaged during activities (on their phone or computer), the session leader will award a grade of zero on the module workshop participation.

- If candidates arrive late or leave early, session leaders must note this for regional/provincial bodies. It will be up to the regional/provincial bodies to determine the consequences, and they will contact candidates directly. A late candidate may still achieve one point for workshop participation if they act and participate in a professional, respectful, and courteous manner after their arrival. There are limitations on how late a candidate can arrive to the workshop or how early a candidate can leave the workshop. Refer to your region/province for further guidance on lateness and participation grading.

Note that the overall grade on the module activities is cumulative. Therefore, the beginning overall grade on the module activities is 0%. As activities are completed and grades are received on those activities, the overall grade on the module activities will increase proportionately to the grades earned, weighted based on the type of module activity (as outlined above).

Candidates need to achieve at least a 75% overall module grade by the end of the module, as this is used to determine exam eligibility. Candidates may view their overall module grade within D2L at any time.

Module exam

Many of the exam resources are located within the CPA Canada website. They are consolidated for reference within the exam resources section of the module. Candidates should review the exam resources to prepare for exam day. Candidates are responsible for knowing all the material that is examinable given the module and the level as set by [The CPA Competency Map](#). Studying all module content may not be enough preparation for the exam. The module covers a large amount of content, but not the entire breadth of content that may be examinable. To reinforce your knowledge of commonly tested topics, refer to the technical review for your module.

Eligibility to write the module exam

To be eligible to attempt the module exam, candidates must achieve a minimum overall module grade on the module activities and attend the workshop(s) (or complete an accommodation workshop activity, if required).

A candidate who attends the workshop (or obtains accommodation for the workshop) and achieves an overall module grade of 75% or higher on the module activities by the end of the module (per the Grades feature in D2L) will be eligible to write the module exam.

A candidate who does not meet this requirement may not be eligible to write the module exam. Only candidates who are not eligible to write the module exam will be notified by

their region/province. Candidates who have not been contacted should assume they are qualified to write unless they hear otherwise.

Candidates are allowed three attempts to pass each core module. If a candidate does not pass a core module in three attempts, they will be expelled from the program. Each elective module may be attempted three times, and two electives must be passed before proceeding to Capstone 1. If a candidate does not pass two electives before exhausting their three attempts per elective module, they will be expelled from the program.

If you are unsure about your eligibility to write the exam, or would like to dispute any of your activities, please contact your regional/provincial delivery body using the information in [Appendix I](#).

Performance in the learning module versus the end-of-module examination

The learning modules are designed to assist candidates in obtaining and developing the competencies outlined in the CPA Competency Map.

While progressing through the technical review, candidates will engage with MCQs hosted on an adaptive learning platform. These MCQs are designed to help candidates review their technical knowledge at varying proficiency levels. Therefore, it is important to note that not all the technical review questions are necessarily representative of the MCQs included in the end-of-module examination.

During the modules, facilitators provide guidance and support, complete feedback guides to offer feedback on practice cases and integrated problems and provide guidance to candidates in their review and debrief of their coursework, all with the intent of supporting the learning process. The end-of-module examinations are designed to assess if students have obtained the competencies at the level examinable per the CPA Competency Map.

Although there is a relationship between the learning activities in the module and the end-of-module examination (for example, performing well on the unit quizzes, integrated problems, and practice cases in the module will greatly increase your likelihood of success on the examination), success in the module does not necessarily guarantee success on the examination. The PEP Board of Evaluators is responsible for oversight of the process for establishing the passing standards for the PEP examinations.

In addition, a candidate's performance might vary between the learning setting and the examination environment. For example, writing a time-constrained examination in a more stressful environment with limited resources (i.e., not open book) can impact a candidate's examination performance as compared with their coursework.

Refer to the [CPA PEP Module Examination FAQs](#) section on "Preparing for CPA PEP Examinations" for additional information on how to prepare for the module-end examination.

Frequently asked questions

- I forgot to complete and submit an activity before the deadline. Can I still receive feedback and grades?
- Where can I find the date and location of my module workshop and exam?
- I'm worried I won't be able to qualify to write the module exam. What should I do?
- Where can I find information related to the module exam?
- What is going to be on the module exam? Is there a formula sheet?
- If I complete and study the quizzes, integrated problems, and practice cases, will that allow me to pass the exam?
- If I consistently receive ratings of C and RC on my integrated problems and practice cases in the module, will that guarantee my success on the examination?
- The eBook does not cover the entire CPA Competency Map. Why not?
- Can I print the eBooks?
- Will I be able to reference the eBook during the exam?
- In each unit, four hours are allocated to "Technical review with the eBook." However, when I set up my study plan in the technical review over eight weeks, there is more than four hours' worth of studying assigned in a unit. Why is the timing different?
- I emailed my facilitator over 24 hours ago and they haven't emailed me back. What should I do?
- It takes me longer to complete the activities than the suggested timing. Why is that?
- I want to sign up for a different workshop or exam location. How do I request to switch my location?

Capstone 1 Candidate Guide

This section of the Candidate Guide is designed to provide key information pertaining to the administration and delivery of the Capstone 1 module. If there is guidance provided in this section that conflicts with information provided in the [Common Candidate Guide](#), please use the information contained within this section as the authoritative guidelines for Capstone 1.

Additional information or answers to any questions not addressed herein should generally be directed to the following resources, in this order:

1. The [Common Candidate Guide](#)
2. The module discussion board
3. Your facilitator
4. Your region/province

Overview

In Capstone 1, there is no new technical material. Instead, the Capstone 1 module focuses on the application of existing knowledge across all competency areas and on the further development of candidates' enabling skills.

Capstone 1 combines individual and team work, supported by written assignments and oral presentations. Teams will typically consist of three to five candidates who will work together as consultants or internal advisors to resolve issues and provide recommendations. The team will submit a final written report to their facilitator and present an oral report to CPAs acting as a board of directors or as senior managers.

The main challenge of Capstone 1 is the breadth of topic coverage across a vast number of technical competencies. No individual candidate is expected to have all this knowledge; rather, candidates will need to rely on other team members who have more expertise in certain topic areas.

Team dynamics such as leadership, professionalism, ethics, teamwork, and self-management are critical to success in Capstone 1.

Capstone 1 has four primary objectives:

1. To continue the development of candidates' enabling competencies, particularly their teamwork and leadership skills, professional and ethical behaviour, problem solving and decision-making, and communication competencies.
2. To simulate an authentic business problem, including gathering and evaluating relevant information, developing a written report, and preparing an oral presentation suitable for delivery to a board of directors or a senior management team.

3. To prepare candidates for the Common Final Examination (CFE), particularly Day 1, which will draw on both the content and the skills developed in Capstone 1.
4. To continue the development of candidates' integration of technical competency areas.

Secondary objectives include continuing the development of candidates' ability to:

1. Solve problems and make decisions in contexts with significant integration opportunities and in situations with increased ambiguity and uncertainty.
2. Analyze problems where further information must be gathered.
3. Conclude and advise in situations where the decision criteria are difficult to determine or where competing decision criteria are present.
4. Conclude and advise in situations where creativity is encouraged to develop solutions that are not obvious.

Module format

Getting started

Once candidates are given access to their module in D2L, they will complete a getting started checklist, familiarize themselves with the module resources, and prepare for the module workshop.

Module workshop

The module begins with a module workshop. Attendance at the module workshop is required and participation is expected and graded. Candidates are expected to complete the module workshop pre-work and participation will be evaluated as detailed below.

Capstone 1 case – report

There is one case that flows throughout the module: the Capstone 1 case. It is focused on strategic analysis and integrates all technical areas.

The case is designed to allow for many different recommendations, resulting in a situation where there isn't necessarily a single "correct" response. As a result, team performance on the Capstone 1 case is assessed holistically.

Teams will begin by preparing planning documents (team agreement, project plan, and project schedule) and then submit their Capstone 1 report in three parts, incorporating feedback received along the way.

Teams may be required to complete revisions on their planning documents, Part 1 and/or Part 2. Optional revisions (those not requested by a facilitator) are not allowed and revisions are not possible on Part 3. See later on for information on the revision process.

The following sections outline what should be included in each submission.

Planning for the report (due in Week 1)

Teams will begin their report by preparing a series of planning documents in the module workshop. These planning documents include a team agreement, a project plan, and a project schedule.

Teams will submit the completed planning documents to their facilitator for feedback in Week 1. This feedback will help with preparing Parts 1, 2, and 3 of the report.

Part 1 of the report (due in Week 2)

In Part 1 of the report, teams will be asked to:

- Provide an overall situational assessment, including appropriate internal, external, and financial analyses to identify major issues.
- Demonstrate the CPA Mindset, especially due care and objectivity.
- Exhibit strong communication that addresses audience needs.

Teams will submit Part 1 to their facilitator for feedback. Feedback on Part 1 will help with preparing Parts 2 and 3 of the report.

Part 2 of the report (due in Week 4)

Teams will complete analyses of the **strategic options** in the Capstone 1 case. Part 2 will focus on the following areas:

- Explanations for choices of quantitative and qualitative tools
- Identification and justification of appropriate assumptions in the absence of relevant case facts
- Thorough analyses using appropriate tools and methods
- Interpretation of analyses, including integration of relevant case facts, research, and the overall situational assessment
- Demonstration of the CPA Mindset, especially due care and objectivity
- Strong communication that addresses audience needs

Teams will submit Part 2 to their facilitator for feedback. Feedback on Part 2 will help with preparing Part 3 of the report.

Part 3 of the report (due in Week 7)

The assessment for Part 3 will focus on the integration of the teams' conclusions and recommendations based on their prior assessment of the current situation and analysis of the issues. The Part 3 report should include:

- A cover page
- An executive summary
- A table of contents
- An introduction
- Finalized analyses from Parts 1 and 2 (updated for feedback from the facilitator)
- Recommendations on, and implementation steps for, **strategic** analyses from Part 2
- Data analysis
- Analysis of additional issues, which may include those related to vision or mission alignment, ethics, performance management, tax, financial reporting, assurance, and others
- A financial forecast based on all recommendations, including additional issue costs (the forecast should include a projected income statement and at least one other full or partial relevant statement)
- A conclusion
- Appendixes and/or exhibits
- References (footnotes and/or bibliography)

Teams will submit Part 3 to their facilitator for feedback. Feedback on Part 3 will help with preparing the oral presentation.

Refer to the Capstone 1 D2L site for detailed instructions on the required content for these team submissions.

Also refer to the module resources section of the Capstone 1 D2L site for a mock team report based on a retired Capstone 1 case. The mock team report will provide further information on what may be included in each submission.

File submission format

All submissions must be in Word and/or Excel. The file extension for submitted documents will be .doc or .docx for a Word file, and .xls or .xlsx for an Excel file. Files that are not formatted as stated above may require resubmission. For each of Parts 1, 2, and 3 of the report, a maximum of one Excel and one Word file will be submitted.

The formatting specifications for the three parts of the Capstone 1 case are as follows:

	Part 1 of the report	Part 2 of the report	Part 3 of the report
Maximum length	1,600 words, excluding appendixes/exhibits ¹	3,400 words, excluding appendixes/exhibits ¹	8,300 words, excluding cover page, executive summary (no more than two pages), table of contents, appendixes/exhibits, and references ¹
Maximum appendix/exhibit pages	10 pages (Word and Excel combined) ¹	20 pages (Word and Excel combined) ¹	25 pages (Word and Excel combined) ^{1, 2}
Document type and page layout	<ul style="list-style-type: none"> • Letter paper size: 8½" × 11" • Margins: 2.54 cm / 1" • Font: <ul style="list-style-type: none"> ○ Word: Arial, Calibri, or Times New Roman 12-point font ○ Excel: Arial, Calibri, or Times New Roman 10-point font³ <p>100% scaling Use of the "fit to page" function is not permitted All pages must be sequentially numbered Financial data may be rounded to the nearest thousand or million if labelled and if rounding does not mislead the reader</p>		
Content of appendixes/exhibits	<p>Quantitative and/or qualitative information, which must be consulted to follow main points in the report, such as:</p> <ul style="list-style-type: none"> • Charts or graphs • Tables of data • Calculations • Summaries of information acquired through research <p>An audit trail with clear referencing must be provided in both Word and Excel, including labelling of amounts, sources of data, and calculation details (unless calculations are clearly evident when a hard copy is printed).</p>		

¹ All submissions will be checked for word count / page limits by your facilitator using the print preview function. Print options will be set according to the paper size, margins, scaling, and other specifications noted above. Any content exceeding the maximums will not be marked. Candidates should ensure that all requirements are met. If Excel is used to prepare appendixes/exhibits, do **NOT** copy the Excel content into the Word document.

² The appendix/exhibit page limit for Part 3 of the report (25 pages) is less than the combined page limit for Parts 1 and 2 of the report (30 pages). Candidates are

expected to demonstrate professional judgment in determining what is relevant for inclusion in their final Part 3 of the report.

³ Excel exhibits comprising 60% or more of non-quantitative text must be in Arial, Calibri, or Times New Roman 12-point font.

Capstone 1 case – oral presentation

At the end of the Capstone 1 module, each team will be responsible for providing a presentation on their Capstone 1 report. Teams will use presentation software, such as PowerPoint or Google slides, and presentations must not exceed 30 minutes. Teams will be provided with more detail on the logistics and delivery method of their presentation, including any Q&A, if applicable, by their regional or provincial offices.

The oral presentation should focus on the overall issues and recommendations. The introduction and closing should emphasize these elements. The presentation should not contain the same amount of detail as the written report, since information presented verbally is assimilated differently than information conveyed in written form. The written report cannot be read during the presentation, nor can the script for the oral presentation be submitted as the written report.

For more details on the oral presentation, see [Appendix V](#) and the Enabling Competencies eBook chapter on Presentation Skills.

Chat calls

Teams will take part in two live 30-minute chat calls with their facilitator in Weeks 3 and 6 of the module. The purpose of the chat calls is to discuss the upcoming submission requirements, address any questions that teams may have, and discuss any concerns about team dynamics. Chat calls are limited to 30 minutes, and so the most important issues should be raised first, including any team dynamic issues the team would like to discuss. Facilitators cannot go over the 30-minute time limit or hold extra chats.

Facilitators will email candidates an initial greeting at the start of the module that will contain possible dates and times for the chat calls.

Teams must send the facilitator an email with **at least two** dates, times, and team time zone (from the facilitator's options) for each chat call, listed in order of preference. The facilitator will then confirm one date and time for each chat call.

During the chat calls, facilitators cannot provide "answers" to the Capstone 1 case. However, they may be able to respond by asking probing questions to aid in the thought process.

Candidates are expected to attend all chat calls, and grades are awarded for attendance. See [Appendix VI](#) for instructions on how to access the chat calls.

Peer and self-assessments

Periodically throughout the module, candidates will complete peer and/or self-assessments. Feedback from the peer assessments will be summarized by the facilitator and will be discussed during the chat sessions. The feedback from the peer assessments will be anonymous.

Facilitator questions

As a team, candidates will develop three questions that they would like their facilitator to address during the chat calls. The questions should be well thought out and are not limited to questions on specific parts of the report.

Introduction to Capstone 2 and the CFE

The Introduction to Capstone 2 and the CFE module is a self-study module that prepares you for Capstone 2 and the CFE and can be completed while you are working through Capstone 1. Completion of this module is **OPTIONAL**. There is no facilitator support, required submissions, grades, or deadlines in this module. Capstone 1 facilitators are focused on guiding their teams to success in Capstone 1 and are not available to answer CFE study questions.

The Introduction to Capstone 2 and the CFE module contains the following resources:

- A Capstone technical review that includes:
 - a custom study plan based on a candidate's availability to study
 - diagnostics that evaluate a candidate's proficiency on technical topics in the module to pinpoint areas requiring further study
 - recommended eBook chapters for each unit, with accompanying practice MCQs
 - tailored adaptive reviews that reinforce learning and provide candidates with an opportunity for additional practice
 - a question bank for candidates to attempt additional practice questions
- A sample CFE study calendar
- Practice cases with supporting materials (debrief notes, walk-throughs, and feedback guides)
- Data analytics and information systems (DAIS) activities
- An unmonitored discussion board where candidates can discuss study plans and form Capstone 2 and CFE study groups

Submissions

Capstone 1 by week

Below is a summary of the activities by week. **Refer to the Capstone 1 D2L site for weekly instructions on submission of individual and team activities.**

Week	Submission	Submission type
MW	Module workshop pre-work	Individual submission
1	Team agreement	Team submission
	Project plan	Team submission
	Project schedule	Team submission
	Academic integrity quiz	Individual D2L quiz
	Module workshop session leader evaluation survey and module workshop survey	Individual D2L surveys (both must be completed for a grade to be awarded)
2	Part 1 of the report	Team submission
	If required, revisions on the team submission from Week 1	Team submission
	Chat call questions for facilitator	Team submission
	Peer and self-assessments	Individual submissions
3	Chat call with facilitator	N/A — no submission, chat call attendance required
	If required, revisions on the team submission for Part 1 in Week 2	Team submission
4	Part 2 of the report	Team submission
5	Chat call questions for facilitator	Team submission
	Peer and self-assessments	Individual submissions
	If required, revisions on the team submission for Part 2 in Week 4	Team submission

Week	Submission	Submission type
6	Chat call with facilitator	N/A — no submission, chat call attendance required
7	Part 3 of the report	Team submission
8	Prepare for oral presentation	N/A — no submission, presentation delivered to region/province
	Facilitator evaluation survey and module survey	Individual D2L surveys (both must be completed for a grade to be awarded)

Submission deadlines

Weekly **initial** responses are due each Friday at 11:55 p.m. Pacific Time.

Revisions, if required, are due Mondays at 11:55 p.m. Pacific Time.

A facilitator may require revisions from a team for the following activities:

Week	Team submission	When revisions are required (per the Overall tab in the Feedback Guide document)
1	Team agreement	The team receives an Overall Score of Reaching Competent (RC) or lower.
	Project plan	The team receives an Overall Score of RC or lower.
	Project schedule	The team receives an Overall Score of RC or lower.
2	Part 1 of the report	The team receives an Overall Score of RC or lower.
4	Part 2 of the report	The team receives an Overall Score of RC or lower.

If you are unsure whether your team is required to complete revisions, email your facilitator.

If revisions are required, the team must revise the submission using track changes (or a new font colour in Excel) for all sections with a **Summary Score** of RC or lower in the Feedback Guide. Note that the Summary Score is different than the Overall Score. The Overall Score is on the Overall tab. The Summary Scores are within the Minimum Proficiency Indicator (MPI) sections in the corresponding activity tab.

Note: If a team receives some Summary Scores of RC or lower, but its Overall Score is a Competent (C), no revisions are required.

Teams are not permitted to submit non-mandatory revisions for review by their facilitator. However, it is still expected that teams update each part of their report to incorporate facilitator feedback and guidance, and improve the overall quality of their Part 3 report and/or their oral presentation.

Formatting, as outlined earlier, must be maintained after revisions are completed. For example, a team may not exceed the maximum page length or word count after completing revisions.

Revisions must be submitted to the revision dropbox by the specified due date.

Online facilitation and feedback

Each candidate/team is assigned to a facilitator. An online facilitator's role is to coach and support candidates/teams in their learning, review and provide feedback on submissions, assess candidate/team competency based on assignments, and help candidates/teams with any questions they have. However, the facilitator does not decide whether a candidate/team succeeds in a module.

Facilitators will provide detailed feedback via the dropbox on the team agreement, project plan, project schedule, and Parts 1, 2, and 3 of the report, within 96 hours of the submission deadline (48 hours for revisions).

The primary purpose of the facilitator feedback is to help candidates learn, not to measure their performance. Facilitators will review responses for evidence that the candidate/team understands the assignment, not that the candidate/team has produced an answer that is free of error.

Facilitator feedback is designed to guide candidates toward understanding the process used to arrive at a competent response that addresses concerns raised in the case. Facilitator feedback on Part 1 of the report should be reviewed and incorporated into Part 2 of the report. Facilitator feedback on Part 2 of the report should be reviewed and incorporated into Part 3 of the report. Facilitator feedback on Part 3 of the report should be reviewed and incorporated into the oral presentation that takes place in Week 8 of the module.

Facilitators will be available via email within D2L and will respond to emails within 24 hours. Candidates/teams are not permitted to email their facilitator to “pre-review” a submission before the deadline.

CPA Canada is dedicated to a quality learning experience for all candidates and encourages candidates to email their facilitator if they are unsatisfied with the quality of their learning experience. If you are unable to resolve difficulties with your facilitator, or

your facilitator has not replied to an email you sent within D2L within the required 24 hours, please contact your region/province using the contact information in [Appendix I](#).

Grading

The grading in Capstone 1 is as follows:

Team submission

Initial submission:

Competent (C) = 5 points
Reaching Competent (RC) = 3 points
Nominal Competence (NC) = 2 points
Not Addressed (NA) = 0 points

Upon revision:

C = 3 points
RC = 1 points
NC = 0 points
NA = 0 points

A candidate must achieve a grade of at least 5 (after revisions) to pass each part of the report.

For example, if a team receives an RC on initial submission (3), then they can only pass by receiving a C on their revisions (3); in other words, the team can't pass by receiving an RC on their revisions (1).

If a team receives an NC on initial submission (2), then they can only pass by receiving a C on their revisions (3); the team can't pass by receiving an RC on their revisions (1).

If a team receives an NA on initial submission (0), then they automatically fail (there is no way to bring their grade up to 5 on revision). An NA on submission implies that the team didn't submit that part of the report at all.

Individual submission

Competent (C) = 1 point
Not Addressed (NA) = 0 points

Note that there are no revision opportunities for individual submissions.

Module workshop

Attendance at the module workshop is mandatory. One point will be awarded to those who attend the workshop and act and participate in a professional, respectful, and courteous manner. Candidates will receive either zero or one point on their participation; there are no part marks for workshop participation. When candidates are consistently disrespectful to others attending the workshop or are disengaged during activities (on

their phone or computer), the session leader will award a grade of zero on the module workshop participation.

If candidates arrive late or leave early, session leaders must note this for regional/provincial bodies. It will be up to the regional/provincial bodies to determine the consequences, and they will contact candidates directly. A late candidate may still achieve one point for workshop participation if they act and participate in a professional, respectful, and courteous manner after their arrival. There are limitations on how late a candidate can arrive to the workshop or how early a candidate can leave the workshop. Refer to your region/province for further guidance on lateness and participation grading using the contact information in [Appendix I](#).

Capstone 1 passing profile

To pass Capstone 1, candidates must:

1. Attend the module workshop.
2. Pass at the team level (Part 1, 2, and 3 of the report, as well as the Oral Presentation and Q&A).
3. Contribute effectively to the team. Candidates are contributing effectively to the team when they are:
 - **Respectful.** Respectful candidates are courteous, polite, and listen to and consider how they can be influenced by the ideas of their team members.
 - **Available.** Available candidates respond to team members within 48 hours of contact, unless they have explained otherwise.
 - **Approachable.** Approachable candidates are friendly, thank their team members for sharing their ideas, and ask open-ended questions.
 - **Collaborative.** Collaborative candidates understand their role and the role of others, recognize interdependencies between team members and share information instead of withholding it.
 - **Helpful.** Helpful candidates assist team members when they are unable to solve a problem, offer to teach others their skills and pitch in when team members are overwhelmed with work.
 - **Reliable.** Reliable candidates get their work done on time, and if a deadline will be missed, they notify their team members of the issue in advance.
 - **Active participants.** Candidates who are active participants are fully engaged in the work of the team, come well prepared for team meetings, listen actively and speak up when they have an idea, comment or concern.
 - **Committed.** Committed candidates care about their work and the work of their team members. They are punctual and always put in their best effort.

4. Make a reasonable attempt (and where applicable, upload to the dropbox) 75% (rounded up), or six of the Capstone 1 weekly individual activities, which include:
 - Module workshop pre-work
 - Academic integrity quiz
 - Two peer and self-assessments (Weeks 2 and 5)
 - Attendance at two chat calls (Weeks 3 and 6)
 - Two pairs of surveys (both surveys within the pair must be completed):
 - module workshop session leader evaluation survey **and** module workshop survey
 - facilitator evaluation survey **and** module survey
 - For example, a candidate must complete both the module workshop session leader evaluation survey and the module workshop survey for a reasonable attempt on this survey pair. Otherwise, the survey pair will be considered incomplete, and no attempt will be granted, even if one survey has been completed.
 - Module workshop participation
5. Demonstrate development of the Enabling Competencies.

Note: See the [CPA Competency Map](#) for a detailed list and description of the Enabling Competencies.

Refer to [Appendix III](#) and [IV](#) for details on the Capstone 1 passing profile.

What impact do team dynamics have on the final module assessment?

In a normal group setting, all teams are likely to experience issues. Candidates are responsible for reporting any **significant** team issues first to the facilitator (through peer reviews, chat calls, and/or through email). If the facilitator is unable to help the team resolve the issue, then it will be escalated to the mentor and regional or provincial administrator.

If the team is unable to resolve the issue, the individuals responsible for creating the issue could be at risk of failing Capstone 1, even if the team passes the written report and the oral presentation components of the module.

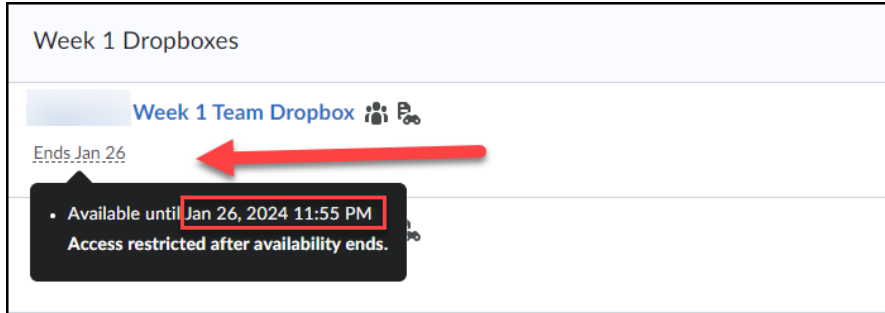
Submitting to the dropbox

Refer to [Appendix IX](#) for instructions on how to submit to the dropbox.

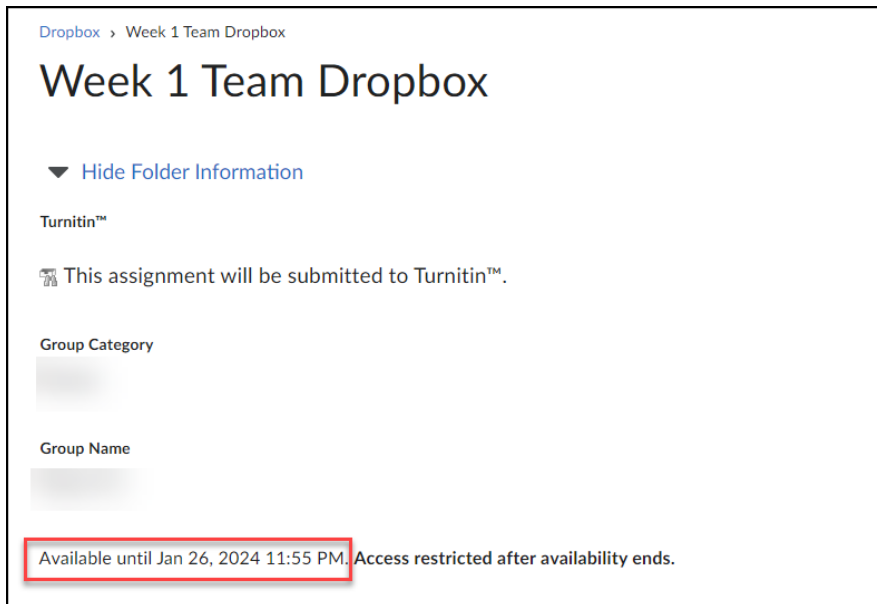
If candidates experience technical difficulties while submitting a response, they should create a support ticket with the [IT Helpdesk](#).

All responses must be submitted to the D2L dropbox by the deadline. The end date for the dropbox is visible below the dropbox folder name, and a short date format is

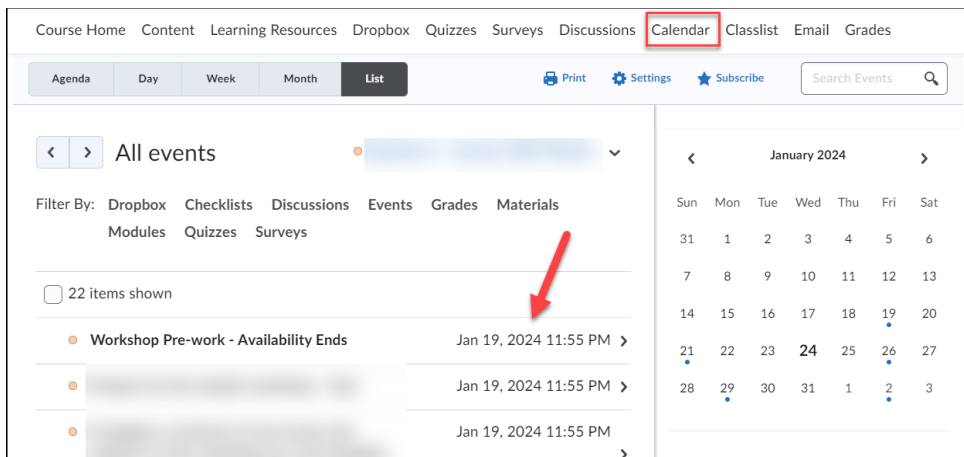
displayed. To view the full end date and time for the dropbox, hover your cursor over the short date.



Alternatively, you can view the full end date and time by selecting the dropbox name and viewing the dropbox folder properties.



Full end dates and times are also visible for all assignments in the calendar tab.



Teams should designate one member to submit each team submission, ensuring that all requisite files are submitted by one person. Another team member should verify that the submission has been made by the deadline.

Candidates/teams must submit documents to the correct dropbox. Only one submission is permitted. After submitting your files, you cannot make edits to them. Be sure to submit your final response only.

Name your submissions as follows:

Submission type	Naming protocol	Example
Team submission	Team#-Week#-ActivityName Note: Add an "R" at the end of the file name for revisions.	Team1-Week1-TeamAgreement.docx
Individual submission	LastnameFirstname-Week#-ActivityName	SmithJan-Week2-SelfAssessment.docx

All deadlines are quoted in Pacific Time, and you can translate the deadlines into your local time zone. Deadlines can be found in the D2L calendar. Facilitators will not provide feedback or review late submissions unless an extension has been granted by the region/province.

If you have submitted the incorrect file to the dropbox, you need to email your facilitator with an explanation of the issue and attach the correct files before the deadline. Facilitators are required to respond to emails within 24 hours, so it is important to email your facilitator the correct submission files, especially when the deadline is approaching. If the facilitator does not receive the correct files before the deadline, then the submission will be considered late and cannot be accepted.

An incorrect file is not a revised version of a file you have already submitted or a file that was missed or damaged/corrupted in the original submission. For example, if a candidate submits a Word file and forgets to attach an Excel file, or the Excel file is damaged/corrupted, the Excel file cannot be accepted via email by facilitators. If your submission qualifies as an incorrect submission, your facilitator will delete your original submission. You will submit the same file(s) you emailed to your facilitator to the correct dropbox. Your facilitator will verify that the same files that were emailed were submitted to the dropbox.

Capstone 2 Candidate Guide

This section of the Candidate Guide is designed to provide key information pertaining to the administration and delivery of the Capstone 2 module. If there is guidance provided in this section that conflicts with information provided in the [Common Candidate Guide](#), please use the information contained within this section as the authoritative guidelines for Capstone 2.

Additional information or answers to any questions not addressed here should generally be directed to the following resources, in this order:

1. The [Common Candidate Guide](#)
2. The module discussion board
3. Your region/province

Introduction

Capstone 2 has three primary objectives:

1. Continue the development of your enabling competencies, particularly your communication and self-management competencies
2. Prepare you for all three days of the Common Final Examination (CFE)
3. Continue the development of your ability to integrate technical competency areas

During the module, you will receive a variety of feedback and support, including:

- Individualized feedback on select case responses from a team of national markers, referred to as the National Marking Centre (see below for more information on the National Marking Centre)
- Debrief guidance that is case specific
- Technical knowledge support through the technical review and eBooks
- Continuous support provided by lead facilitator(s) on the discussion board

Candidates should expect to spend approximately 15 hours weekly on Capstone 2.

Candidates are not assigned a facilitator, nor are they permitted to email their lead discussion board facilitator. Candidates are encouraged to use the discussion board to ask questions on practice cases and/or questions of a technical nature. In addition, candidates are encouraged to respond to their peers' questions and comments. Candidates may [contact the National Marking Centre](#) about their individual performance on practice cases marked by the National Marking Centre.

CPA Canada is dedicated to a quality learning experience for all candidates and encourages candidates to email their region/province using the contact information in [Appendix I](#) if they are unsatisfied with the quality of their learning experience.

Module requirements

Aside from a workshop, the balance of the module consists of independent online learning.

Throughout Capstone 2, candidates will be writing practice cases that resemble the three days of the CFE. These Capstone 2 practice cases are commonly referred to as “Day 1,” “Day 2,” and “Day 3” cases. Candidates will also write a two-day mock CFE that resembles Days 2 and 3 of the CFE.

There is no examination at the end of Capstone 2. To pass Capstone 2 and **be eligible to proceed to the CFE**, candidates must:

1. Attend the Module Workshop*.
2. Make a reasonable attempt** on (and where applicable, upload to the dropbox) 75% (rounded up), or 17 of the Capstone 2 weekly activities, which include:
 - 12 marked practice cases
 - Two marked Module Workshop cases
 - Four unmarked practice cases
 - Module Workshop surveys (Module Workshop session leader evaluation survey and Module Workshop survey — both surveys must be completed to fulfil this survey activity requirement)
 - End-of-module survey
 - Capstone 2 Introduction quiz
 - Academic integrity quiz
 - Module Workshop participation*

*** Grade will be awarded after Module Workshop participation is verified. If an accommodation has been granted, grade will be awarded once candidates complete the assigned accommodation activities by the stated deadline.**

**** A reasonable attempt on a practice case is defined as writing the response under exam-like conditions, without submitting a blank or unrelated response, or using additional time or resources. There is no minimum score requirement. It is recommended that candidates aim to provide their response within the recommended time frame and under exam-like conditions to receive the most valuable feedback from the National Marking Centre.**

Eligibility to proceed to the CFE will be posted to the D2L homepage by the date specified on your regional/provincial website.

Gradebook

Candidates can track their performance throughout Capstone 2 by referring to the gradebook in D2L (accessed by clicking “grades” in the toolbar at the top of the webpage).

A reasonable attempt on each activity is worth one point, for a total of 23 points in the module. Candidates need to achieve 75% (rounded up), or 17 points overall by the end of the module to proceed to the CFE.

IMPORTANT NOTE: Grades will be displayed in the gradebook within 96 hours of the posted deadline for the activity, with the exception of the Module Workshop grade, which will be displayed eight days after the end of the Module Workshop. **Feedback on practice cases marked by the National Marking Centre will be returned to candidates on the dates noted in the [Capstone 2 calendar](#).**

If your grades are not displaying in the gradebook after the timeframe outlined above, file a ticket with the [IT Helpdesk](#) by selecting the IT Helpdesk button.

National Marking Centre

The Capstone 2 National Marking Centre consists of markers from across Canada, many of whom have marked the CFE and the CPA PEP core and elective end-of-module exams. These markers are tasked with marking and providing meaningful feedback to candidates on 12 Capstone 2 practice cases. The National Marking Centre will also mark the Day 3 Module Workshop practice case and selected common assessment opportunities (AOs) of the Day 2 Module Workshop practice case. The Day 1 Module Workshop case and the remaining four practice cases in the Capstone 2 module will be self-debriefed by candidates. For information on which practice cases will be marked by the National Marking Centre, consult the [Capstone 2 calendar](#).

Markers are selected based on their past marking experience, their attendance and performance at a training session, their completion of the session-specific training requirements prior to each marking session going live, and their demonstrated commitment to the profession. Markers will be overseen by a team leader and a group of assistant team leaders for each marked practice case. Team leaders and assistant team leaders continuously monitor the quality of feedback provided and the consistency of the marking across the team, looking for instances where a marker is being too harsh or too lenient on an AO. Where inconsistent marking is noted, the marker will be consulted and retrained, if necessary.

Candidates are reminded that the primary focus of the National Marking Centre is on the feedback being provided to candidates. While consistency of marking is important, candidates may note instances of inconsistency between the rankings they receive and

the rankings of their peers. This is not a cause for alarm. The CFE will be marked much more slowly, over a longer period of time, and will focus on consistency, not feedback.

The National Marking Centre will return feedback to candidates by the dates outlined in the [Capstone 2 calendar](#). Please note that the National Marking Centre will not mark late submissions unless an extension has been granted by the candidate's regional/provincial delivery body.

National Marking Centre feedback on Day 1, Day 2, and Day 3 cases

For cases assessed by the National Marking Centre, markers will complete a feedback guide in Excel, which will rank performance by element (Yes, Partial, or No), rank overall performance by AO, provide a place for markers to comment on why candidates received a certain assessment and how to move to the next assessment level (where applicable), and provide a place for markers to give feedback on communication and the candidate's response as a whole.

In addition to written feedback, candidates will receive a short audio message from their marker that communicates overall performance. The feedback guide and audio feedback will be returned to candidates via the D2L dropbox, by the dates outlined in the [Capstone 2 calendar](#).

Quartile performance

Quartile performance scores will be provided for Day 2 and Day 3 practice cases to help candidates determine where they rank in relation to overall candidate performance.

Each feedback guide will include a total score based on the number of AOs and candidate performance. Scores will be determined for each ranking as follows:

- Not addressed (NA) = 0/2
- Nominal competence (NC) = 0/2
- Reaching competence (RC) = 1/2
- Competent (C) = 2/2
- Competence with distinction (CD) = 2/2

Once candidates receive feedback from the National Marking Centre, they are encouraged, as part of their second self-debrief, to compare the total score from their completed feedback guide to the quartile performance document. This will help candidates determine where they rank in relation to overall candidate performance. For cases that are not assessed by the National Marking Centre, the quartile performance is based on historic candidate results, and candidates are encouraged to review the quartile performance during the initial self-debrief.

Please refer to the quartile performance document for each case for more detail and instructions.

Note that a quartile performance document and a total score will not be provided for Day 1 practice cases. However, for Day 1 cases only, the average candidate performance on the overall assessment will be provided in the “Candidate performance by AO” document.

Contacting the National Marking Centre

Once candidates have reviewed their feedback from the National Marking Centre, they may have questions on their individual assessment.

Candidates can ask questions about areas of their feedback that they disagree with by submitting a ticket to the National Marking Centre hotline for up to five days after the feedback return deadline. The hotline can be accessed through the [CPA Canada Helpdesk](#) by clicking the “Capstone 2 National Marking Centre” button and filling out the form as prompted.

When completing the form, candidates must enter their candidate ID, also known as their D2L ID. Candidates can find their candidate ID on their Capstone 2 module registration documentation. The candidate ID must be inputted correctly, as the hotline will use this ID to retrieve the candidate’s response and completed feedback guide.

In the “Description of issue” field, candidates should be specific about the concern and which AO(s) the question relates to. For example: “AO1 was assessed at RC, but I think that I should have been assessed at C because of [insert rationale here].” Tickets that do not include an appropriate rationale for why the candidate feels the grading is inaccurate may be sent back to the candidate to provide more details. The hotline will not re-evaluate responses on request.

Candidates can expect a response within 24 hours of their ticket being assigned to a hotline agent. For tickets that are more complex to address or when the National Marking Centre is experiencing high ticket volumes, candidates will be provided with an estimated timeline for a response.

The National Marking Centre hotline will respond to tickets relating to the candidate’s individual performance on practice cases marked by the National Marking Centre. General case-writing and Capstone 2 questions should be posted to the appropriate discussion board topic. If general case-writing and Capstone 2 questions are received by the National Marking Centre, candidates will be redirected to the appropriate place for their questions.

The cutoff for tickets received by the National Marking Centre is 2 p.m. Pacific Time the day before Day 1 of the CFE. Tickets received by the National Marking Centre after this time will not be answered.

Calendar

The [Capstone 2 calendar](#) (also accessible through the module) runs from Saturday to Friday and provides candidates with detailed information about when each practice

case is due and when feedback from the National Marking Centre can be expected, where applicable. Consult the calendar carefully to determine which practice cases are required to be submitted in each week.

IMPORTANT NOTE: Unlike other modules, practice cases are **not** all due on Fridays. Candidates are reminded to refer to the Capstone 2 calendar for the due dates.

Writing early

While candidates have the option of writing and submitting their practice case responses at any time before the stated deadline, candidates are encouraged to write their practice case responses only in the week in which they are due. The reason for this recommendation is twofold: practice case responses that are submitted early will not be marked and returned to candidates by the National Marking Centre before the stated feedback deadline. Also, it is known that candidates improve their writing skills by digesting and applying feedback received on previously submitted practice case responses. If candidates write all of their practice case responses in the first few weeks of the module, they will not have an opportunity to apply feedback received from the National Marking Centre and gauge their improvement over the course of the module.

Learning materials

The cases written throughout Capstone 2 are prior years' CFE cases, with the exception of the Day 1 cases. While the cases will cover some of the [CPA Competency Map](#), they will not provide candidates with a summary or comprehensive coverage of all of the technical topics required for the CFE. **Candidates will be responsible for technical studying beyond what is in the practice cases in the module.**

For information on the standards and regulations that candidates are responsible for on the CFE, see the technical update on the [CPA Canada website](#) for more detail.

Capstone 2 is designed to provide candidates with all of the learning materials and resources necessary to facilitate effective studying in the weeks leading up to the CFE, with no time off from work. Learning materials for each practice case are accessible within the module.

The following learning materials will be provided for the **Day 1** practice cases:

Debrief material	Explanation
Solution	A complete solution that includes a situational analysis framework. Note that the solution is beyond the requirements for a "clear pass" response, and is usually much longer than what can be achieved in an exam setting.
Feedback guide*	A guide to assess performance, based on the solution.
Walk-through	An annotated version of the practice case, highlighting key facts and triggers to the requireds.

Debrief material	Explanation
Debrief notes	Notes to highlight specific areas of the practice case and to summarize key learning points.
Strong sample response and marked feedback guide	A strong, passing response, demonstrating the level of depth and breadth that can realistically be achieved in an exam setting.
Candidate performance by AO	For Day 1 practice cases assessed by the National Marking Centre, overall candidate performance will be provided, highlighting key areas of strengths and weaknesses to aid in candidate assessment of their performance relative to peers.

The following learning materials will be provided for the **Day 2 and Day 3** practice cases:

Debrief material	Explanation
Solution	<p>A complete solution that demonstrates case-writing best practices, including the use of headings, point form, templates, and exhibits. Note that the solution is a competency with distinction response and is usually much longer than what can be achieved in an exam setting.</p> <p>The solution is meant to illustrate to candidates <i>how</i> to write a best response for the various issues in the practice case, and to provide some technical detail for study purposes.</p>
Feedback guide*	A guide to assess performance, based on the solution.
Walk-through	An annotated version of the practice case, highlighting key facts and triggers to the requires.
Debrief notes	Notes to highlight specific areas of the practice case and to summarize key learning points.
Strong sample response and marked feedback guide	A strong, competent response, demonstrating the level of depth and breadth that can realistically be achieved in an exam setting.
Quartile performance	An allocation of the range of possible scores across four quartiles, based on overall candidate performance, to enable assessment of candidate performance in relation to overall results, where applicable.
Candidate performance by AO	For select cases, National Marking Centre comments on overall candidate performance by AO, highlighting key areas of strengths and weaknesses.

*Feedback guides are provided in Capstone 2 to assist with debriefing. They are not intended to mimic the marking guides used by the CPA Canada Evaluations group. Certain components of the feedback guides have been automated, to assist with

determining ranking on each AO. Please refer to the spotlight videos in D2L for more detail on the automation.

Additional module resources

- A workshop at the beginning of the module where candidates are provided with information on Capstone 2 and the CFE — candidates will also learn valuable case-writing and study tips, and will have an opportunity to write parts of a Day 1, Day 2, and Day 3 practice case
- One-hour weekly webinars that cover a number of topics including case-writing tips, Capstone 2, and CFE frequently asked questions, as well as themes and challenging technical topics encountered in weekly practice cases (candidates unable to attend the live webinars [where applicable] will be able to access pre-recorded versions of the webinars).
- A discussion board with at least one lead discussion board facilitator who continuously monitors and provides timely responses to candidate questions
- Additional practice cases (with supporting learning materials) beyond those practice cases included in the Capstone 2 module
- Flashcards summarizing key technical content covered in the Capstone 2 practice cases
- Technical knowledge support through the eBooks
- An Excel tracking sheet designed to facilitate results tracking and interpretation
- A sample CFE study calendar
- Access to the National Marking Centre, which marks and provides feedback to candidates on the two Module Workshop case submissions and 12 practice cases throughout the module
- Access to employees of the candidates' regional/provincial body who are dedicated to supporting candidates through the CPA PEP
- A detailed [Capstone 2 calendar](#) that outlines the due dates for each of the Capstone 2 activities and feedback return dates for practice cases that are marked by the National Marking Centre
- Short videos that walk through the key learning points of a Day 1, Day 2, and Day 3 practice case
- Spotlight videos that walk through various topics related to Capstone 2 and the CFE

When to use the learning resources

It is not necessary for candidates to use all of the learning materials provided to them in Capstone 2. Below are some common areas of difficulty described by candidates and a suggestion for the learning resources that may help them. Please note that this is not a prescriptive list; some candidates may find different learning resources useful to them in similar situations.

Question: I read the case and attempt to analyze the issues, but I always seem to address issues that aren't important to the case and miss AOs. What should I do?

Answer: This seems like an issue related to identifying the requirements in the case. You may be focusing on perceived requests for analysis and not noticing the main triggers in the case.

Recommended learning resource: Walk-throughs; debrief notes

Walk-through files help identify where the triggers are located in a case and help determine how other case facts can be used in the analysis. The debrief notes identify the main triggers in the case, as well as other additional triggers that point to the main issues.

Question: I am able to see the requirements in the case, gather all the case facts, and attempt an analysis, but I can't seem to provide enough details in my response or structure my response to provide a meaningful analysis. What should I do?

Answer: This seems like an issue with achieving depth in your response. You might be performing a superficial analysis or might not be approaching the analysis from the correct perspective.

Recommended learning resource: Solutions; debrief notes; eBooks, strong sample responses

The solution, debrief notes and eBooks explain the technical subject matter; a solid understanding of the technical material is necessary as a foundation for achieving depth in the case response. These learning resources also demonstrate how to apply the case facts to perform the required analyses. The strong sample responses provide examples of how to format your response and how to structure and approach the different issues in your case response.

Question: I read the case, can recognize what is required, and perform a very detailed analysis on a few elements. However, I am often held back from achieving competence. What should I do?

Answer: This seems like an issue with achieving adequate breadth in your discussion. Your case response must discuss each element in depth, but it must also discuss enough of the elements related to each issue (breadth). You might not be identifying enough case facts related to each issue, which is holding you back from performing a broad enough analysis.

Recommended learning resource: Walk-throughs; feedback guide

The walk-through files help identify additional case facts that should be used in the calculations or discussions, to help increase the breadth of the analyses. The feedback guide provides details on the amount of breadth that was expected for each issue to reach competence.

Question: I read the case and am able to easily recognize all the issues that need to be addressed, but I don't understand how to perform the analyses that are being requested.

Answer: This seems like an issue with technical knowledge. It is important to have a solid foundation of the technical competencies so that you can understand how to address the issues and to formulate your response.

Recommended learning resource: Solutions, eBooks, flashcards, debrief notes

These learning resources explain the technical concepts on the various competency areas.

Mock CFE

The mock CFE consists of the Day 2 and Day 3 exam papers from a recent CFE.

The Day 2 mock CFE paper should be written in five hours, and the Day 3 mock CFE paper should be written in four hours. The mock CFE will be written remotely (not in a writing centre) and may be written by candidates at any time, as long as the files are submitted by the calendar due date. Day 2 of the mock CFE is due on the Saturday of Week 4. Day 3 of the mock CFE consists of three practice cases in one exam and is due on the Sunday of Week 4.

The mock CFE provides candidates with an opportunity to practice writing Day 2 and Day 3 of the CFE. It is a valuable study resource.

IMPORTANT NOTE: For the Mock CFE Day 3 exam, you must write each case in a separate Word and Excel file and submit to the corresponding dropbox in D2L.

CPA Canada strongly recommends that candidates wait until Week 3 of Capstone 2 to write the mock CFE. This will ensure that candidates have received feedback from the National Marking Centre on their Module Workshop, Week 1 and 2 practice cases and are provided with an opportunity to apply some of the skills they have learned on the mock CFE.

Discussion board

A discussion board, moderated by lead facilitator(s) for each region/province, is made available to candidates for the duration of Capstone 2. While the lead facilitator(s) are not the same people who are marking candidates' practice case responses, they are very familiar with the content of each practice case and can address any module-related inquiry. Candidates are encouraged to subscribe to the "Important Announcements" board and any other forums or topics that are of interest.

The discussion boards that are available to candidates include:

- **Important announcements:** Capstone 2 lead facilitator(s) will post important information to candidates about Capstone 2 and/or the CFE here. Candidates are

not permitted to post under this topic. Any candidate posts to this topic will not show up and will not be answered.

- **CFE questions:** candidates are encouraged to post questions about the CFE here.
- **General Capstone 2 questions:** candidates are encouraged to post general questions about the Capstone 2 module here.
- **General case-writing questions:** lead facilitator(s) will share case-writing best practices and answer candidate questions related to case-writing here.
- **Additional practice cases:** lead facilitator(s) will answer questions about the additional practice cases here.
- **Case-specific questions (by case and AO):** lead facilitator(s) will answer questions about specific practice cases here. Lead facilitator(s) will not answer questions about individual performance on specific practice cases received from the National Marking Centre. Candidates should contact the National Marking Centre via the hotline for queries related to individual performance.
- **Module Workshop questions:** lead facilitator(s) will answer questions about the Module Workshop here.
- **Study partners:** candidates can use this discussion board to find a study partner to work with. This discussion board will not be monitored by the lead facilitator(s).

Candidates are reminded to use online discussion board etiquette, as outlined in the [Common Candidate Guide](#).

The lead facilitator(s) will only address discussion board posts related to cases written as part of Capstone 2 or included in the additional practice cases folder. **Questions pertaining to any other case will not be addressed.**

The lead discussion board facilitator(s) will not be available after 2 p.m. Pacific Time the day before Day 1 of the CFE. Discussion board posts will not be addressed after this time.

Additional practice cases

Additional practice cases, along with the solutions and select supporting material, are available to candidates in Capstone 2, as a resource to supplement their study. Completion of these cases is **optional**. These cases will not be marked by the National Marking Centre.

The additional practice cases and solutions were used in prior offerings of Capstone 2 and are based on past CFE cases.

The following additional practice cases have been updated for changes to the *Handbook* and the *Income Tax Act*:

Day 2

RMZ Pharmaceuticals Inc.
Farm Fresh to You Inc.

Day 3

Dreamy Donuts Co.
Festival Inc.
Sally's Good Furniture
FenceCo
Kitchen Apparel Inc.
Wicked Water Sarnia Inc.

The following additional practice cases have **not** been updated for all changes to the *Handbook* and the *Income Tax Act* or case-writing best practices:

Day 2

Atlantic Shellfish Inc.
K-Med Ltd.
Ferguson Real Estate Inc.
TankCo Limited
Solar Panel Solutions Inc.
EnviroCab Inc.

Day 3

Bamboo Bikes Inc.
Chang ESL Academy Inc.
Katwill Lodge Inc.
Perfecto Painters Inc.
National Mail
Canadian Holistic Health Practitioners
Dogani Inc.
Culinary Crawl
Play Canada Inc.
Elder Care Centre and Spa Inc.
Roxanne Kalpert
World Wide Windows Inc.
Perkins Packing Inc.
Jump Inc.
King Street Theatre
Lake Country Camping Inc.
StillGood Food
Veza Eye Centre Limited

Study partners

In addition to the Capstone 2 resources, candidates are encouraged to work with a coach and/or a study group.

When looking for a coach, candidates are encouraged to find someone that they feel comfortable with, who is willing to share their knowledge and experience and who will be available to the candidate for moral support, if needed. A coach doesn't have to reside in the same city as the candidate, as information can be easily shared electronically or by phone.

Candidates may also want to consider joining a study group. Study groups can take many different forms. Some study groups choose to write, mark, and debrief every Capstone 2 practice case together, while other study groups only come together to mark and debrief practice cases after having written and marked the practice cases individually. Some study groups have members that reside across Canada and come together using tools, such as Zoom or Skype, while other study group meet in person daily. Candidates are reminded that an effective study group is a group that works for each member. There is no "right way" when it comes to study groups.

In some situations, a candidate may decide that their study group is no longer providing the support that the candidate needs during their CFE preparations. When this happens, candidates are encouraged to leave the study group. Although this may cause a disruption to the other group members, it is very important that each candidate prepares for the CFE in a way that works for them.

Study group members can be found in many different ways. Candidates can:

- Form study groups with colleagues.
- Use the Introduction to Capstone 2 and the CFE module "Study partners" discussion board or the Capstone 2 "Study partners" discussion board to find a study partner(s).
- Connect with CFE candidates who were enrolled in the same CPA PEP modules or preparatory courses.

Peer review is not formally mandated by CPA Canada. However, it is a recommended step to help candidates learn from one another. It has been demonstrated that significant learning can be derived from seeing another's work.

Submissions

Refer to [Appendix IX](#) for instructions on how to submit to the dropbox. The end date for the dropbox is visible below the dropbox folder name, and a short date format is displayed. To view the full end date and time for the dropbox, hover your cursor over the short date.

Module Workshop Dropboxes

Activity 2: Write a Day 3 Case

Ends Apr 6

• Available until Apr 6, 2024 11:55 PM
Access restricted after availability ends.

Accommodation

Alternatively, you can view the full end date and time by selecting the dropbox name and viewing the dropbox folder properties.

Dropbox > Activity 2: Write a Day 3 Case

Activity 2: Write a Day 3 Case

▼ Hide Folder Information

Turnitin™

This assignment will be submitted to Turnitin™.

Instructions

Available until Apr 6, 2024 11:55 PM. Access restricted after availability ends.

Full end dates and times are also visible for all assignments in the calendar tab.

If candidates experience technical difficulties while submitting a response, they should visit the [IT Helpdesk](#).

Case responses must be written in Word and Excel and uploaded to the D2L dropbox. Unless otherwise stated, no other file formats (including PDF files) are accepted.

Submissions may only be a maximum of one Word and one Excel file. Submissions containing an extra file (for example, two Word files) will not be marked.

The Excel portion of case responses must be written using only one worksheet. **Do not use multiple worksheet (tabs).**

Responses must:

- Be in Arial, Calibri, or Times New Roman 12-point font
- Be single spaced
- Have 1" margins

Candidates will use Knotia to access reference material when writing case responses. For more detail on Knotia, refer to your Capstone 2 D2L site.

- An important difference to note from earlier modules is that the Capstone 2 D2L dropboxes will accept multiple submissions up until the submission deadline. Only the last submission will be retained.
- The naming convention also has an important difference from the instructions provided for other modules. In Capstone 2 candidates must use their candidate ID number in place of their candidate name.
 - For example, a Week 2 Day 3 practice case would be “1234567_W2D3.docx”. Note that for Week 7, both response files will use the same name, for example, both response files will be named as “1234567_W7D3.docx”.
 - For the Module Workshop practice cases, the file name would include “MW” in place of week number, for example, “1234567_MWD2.docx”.
 - For the Mock CFE, utilize the following naming conventions, for the applicable case:
 - 1234567_MockD2_UBI
 - 1234567_MockD3_HG
 - 1234567_MockD3_HAI
 - 1234567_MockD3_CBA
- PDF documents and encrypted practice exam files will not be accepted by the National Marking Centre.

It is expected that candidates will attempt and submit all practice cases on time. The National Marking Centre will not mark late submissions. In extenuating circumstances, a candidate may request an extension with their region. See the Common Candidate Guide for more details on extensions. Regional/provincial contacts for extensions can be found in [Appendix I](#).

Debriefing

A thorough debriefing of each practice case is an important element in preparing to successfully write the CFE. With the aid of the solutions and other supporting documents, such as feedback guides, debrief notes, and so on, debriefing will help candidates gauge their performance and improve their ability to identify issues, address user needs, and prepare useful and efficient qualitative and quantitative analyses. Debriefing also helps candidates develop and learn how to apply technical knowledge. For more detail on how to effectively debrief a practice case response, review the “Exam Preparation – Debriefing a Case” chapter in the Enabling Competencies eBook.

The total time spent on debriefing a practice case should be at least as long as it took to write the practice case. This total debrief time includes both the initial self-debrief and, for practice cases marked by the National Marking Centre, any additional time spent on the second debrief after the National Marking Centre feedback is received.

Ideally, the initial self-debrief of a practice case should occur shortly after writing the response. For marked practice case responses, the second debrief should be performed shortly after receiving feedback from the National Marking Centre.

As noted earlier, candidates are encouraged to compare the total score from their completed feedback guide to the quartile performance document, where applicable, as part of their debrief.

Surveys

The candidate Module Workshop session leader evaluation survey, Module Workshop survey, and end-of-module survey are required activities in Capstone 2. The surveys are completed within D2L. Plan to complete each survey in one sitting. After all questions have been answered, click “Submit Survey” to send your feedback to CPA Canada. You must click “Submit Survey” to complete your survey attempt.

Note that the Module Workshop session leader evaluation survey and Module Workshop survey must be completed together to earn a grade. Candidates must complete the Module Workshop session leader evaluation survey **and** the Module Workshop survey to receive a grade in the gradebook or they will receive a grade of zero, even if one survey has been completed.

CFE marking

Details on how the CFE is marked are outlined in the [CFE Board of Examiners' Reports](#).

It is strongly suggested candidates familiarize themselves with how the CFE will be marked, including paying particular attention to the message to candidates, which details what past CFE writers did well and where there was room for improvement.

Writing the CFE

For information on CFE software, reference materials, and all other CFE-related questions, please refer to the following resources:

- [Technical update for the CFE](#)
- [CFE examination regulations](#)
- Supplemental CFE frequently asked questions, located in the ‘Access the CFE resources’ section in the CFE resources checklist of the Capstone 2 D2L site
- Regional/provincial specific guidance, to be released by the regions/provinces close to the CFE writing date

Appendix I: Regional/provincial contact information

Academic accommodations

For information related to:	Contact:
An academic accommodation for missing module activities or exam accommodations for medical reasons or disability	Visit the Accessibility and Special Accommodation Requests page.

CPA West (CPAWSB)

For information related to:	Contact:
A change in the assigned in-person workshop location	cpamodule@cpawsb.ca
Enrolment questions and requests, including withdrawing from a module and DiSC profile assessments	cpamodule@cpawsb.ca
An activity extension	Visit the Extensions page on the CPA Western School of Business website.
Exam locations (posted two weeks before exam date)	Visit the CPA Western School of Business website.
In-person workshop locations (posted two weeks before workshop)	Visit the CPA Western School of Business website.
Counselling or mental health resources	Visit the CPA Western School of Business website.

CPA Ontario

For information related to:	Contact:
A change in the assigned in-person workshop location	cpaPEPenrolment@cpaontario.ca
Enrolment questions and requests, including withdrawing from a module	cpaPEPenrolment@cpaontario.ca
An activity extension	cpaextensions@cpaontario.ca
Module or challenge exam registration, including Module Zero	cpaPEPenrolment@cpaontario.ca
DiSC profile assessments	cpamodule@cpaontario.ca
In-person workshop locations (posted one week before the module start date)	Visit the CPA Ontario website.

CPA Quebec

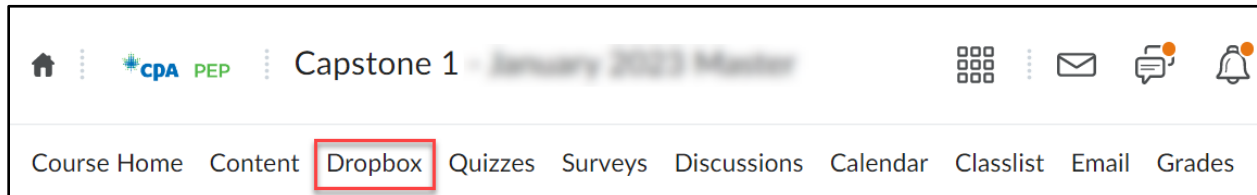
For information related to:	Contact:
A change in the assigned in-person workshop location	programmenational@cpaquebec.ca
Enrolment questions and requests, including withdrawing from a module and DiSC profile assessments	programmenational@cpaquebec.ca
An activity extension	programmenational@cpaquebec.ca
In-person workshop locations (provided 10 days before the workshop)	Candidates will be contacted directly

CPA Atlantic

For information related to:	Contact:
A change in the assigned workshop location	programs@cpaatlantic.ca
Enrolment questions and requests, including withdrawing from a module and DiSC profile assessments	programs@cpaatlantic.ca
An activity extension	programs@cpaatlantic.ca
Workshop locations (provided shortly after the module start date)	Posted directly to D2L

Appendix II: Capstone 1 – How to find your team

To determine who is in your Capstone 1 team, log in to D2L and navigate to your Capstone 1 module homepage. Then, click on “Dropbox.”



Navigate to one of the team dropboxes to view the team you have been assigned to. The team name will also indicate who your facilitator is.

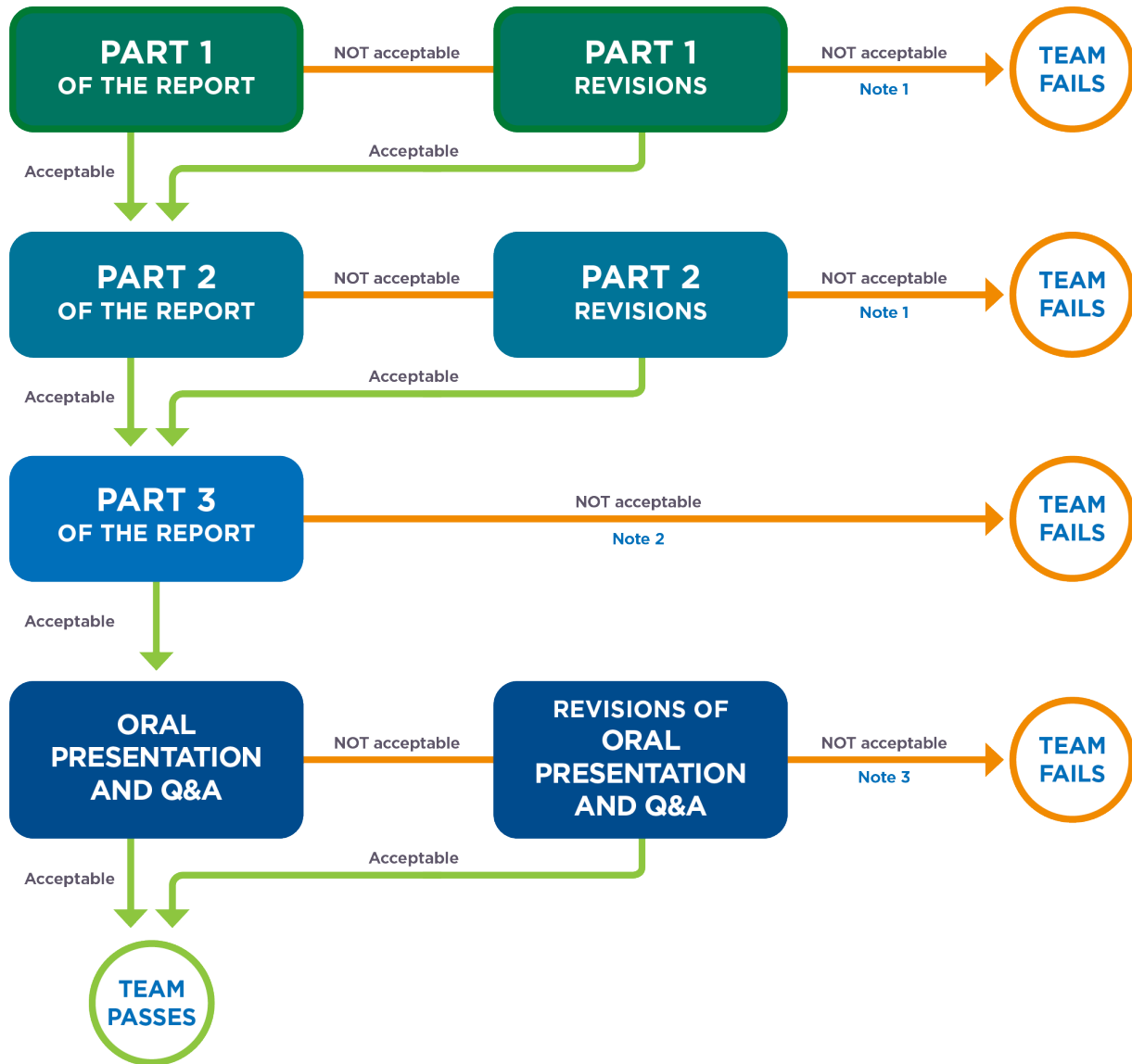
Dropbox Folders

[View History](#)

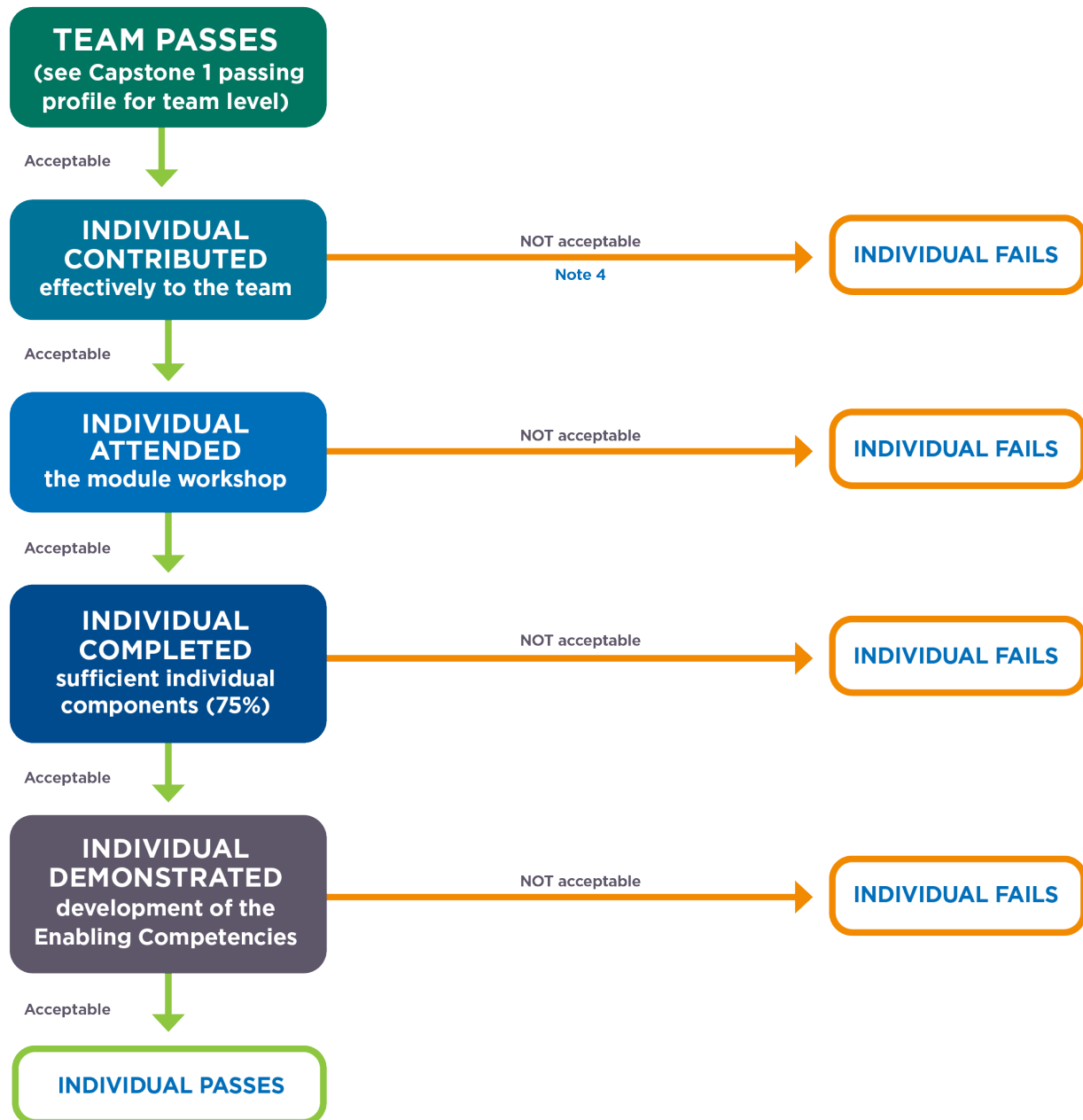
Folder	Completion Status	Score	Evaluation Status
Module Workshop Dropboxes			
Workshop Pre-work		- / -	Feedback:
Week 1 Dropboxes			
FAC Team 16 - Week 1 Team Dropbox		- / -	Feedback:

A red arrow points to the 'Week 1 Team Dropbox' entry in the table.

Appendix III: Capstone 1 – Passing profile for team level



Appendix IV: Capstone 1 – Passing profile for the individual level



Notes:

1. When Part 1 or Part 2 of the report requires revision, that revision is marked by the team's facilitator. If the revised report is deemed not acceptable, the report will be cross marked by an experienced lead facilitator. The cross-marked evaluation is the final evaluation.
2. If the original submission of Part 3 of the report is deemed not acceptable, the report will be cross marked by an experienced lead facilitator. The cross-marked evaluation is the final evaluation.
3. If a Capstone 1 team is unsuccessful on their panel presentation, they will have one opportunity to re-present to a second panel. Unsuccessful re-presentations are evaluated at least twice and reviewed by another province/region before the unsuccessful result is released. Appeals (remarks) are not available for unsuccessful panel presentations.
4. Candidates are contributing effectively to the team when they are respectful, available, approachable, collaborative, helpful, reliable, active participants, and committed. An individual's contribution to the team may be deemed to be unacceptable if there is substantial evidence throughout the module via peer reviews and facilitator meetings to support the claim. Regional or provincial administration staff will be involved before this stage, and the individual will be adequately warned of the consequences.

Appendix V: Capstone 1 – Oral presentations

As noted earlier, each team will be required to provide a presentation on their Capstone 1 report, which should focus on the overall issues and recommendations. The written report cannot be read during the presentation, nor can the script for the oral presentation be submitted as the written report. The presentation evaluators will not have access to the team's written report, and teams may not submit their written report as part of their presentation supporting materials.

Following the presentation, teams must be available for a question and answer (Q&A) period, at the discretion of their region/province. The team's region/province will provide details on the logistics of the presentation process.

During the Q&A period, team members should be able to respond to questions confidently. If necessary, teams should clarify questions before attempting to provide answers. The answers should address both the specifics of the question and, if appropriate, the underlying assumptions. Team members should be able to support the arguments and recommendations made during the presentation. Teams may be asked for more information in the Q&A period, and the team should be prepared to answer any questions. This may mean creating additional visual exhibits to be used for the Q&A period. Each team member should participate equally in the presentation and the Q&A period.

Teams will receive their final pass/fail assessment from their region or province. It is important to note that individuals can fail the oral presentation even if their team passes. If teams fail their oral presentation, they will be advised by the regional or provincial office and will be provided with details on re-presenting their oral presentation.

The following are preparation and presentation tips for teams to consider:

- Divide the topics in the presentation, and plan who will respond to questions for that topic, if required.
- Practice handing off discussion to a team member in a way that appears natural.
- Consider what to do if a team member appears to be struggling with the question.
- Teams should be well prepared for the oral presentation and have a strong understanding of the content of the presentation. At the same time, the presentation should not seem overly rehearsed.
- During the Q&A, if team members are unsure of the question being asked, they should seek clarification before an answer is attempted.
- Team members should speak clearly and audibly at a moderate speed. Team members are reminded that the expectation is that they present without cue cards.

- Team members should maintain eye contact and face the audience at all time, avoid the use of excessive hand gestures, and manage their time.
- Practise, practise, practise!

Oral presentations — frequently asked questions

1. Will there be any warnings/repercussions for oral presentations that are too short or too long?

Teams are encouraged to spend the full 30 minutes on their oral presentation.

Teams are responsible for managing their time during the oral presentation. Panel members will stop the oral presentation after 30 minutes, and teams will not be able to present after this point. The team will not be penalized for ending the oral presentation early.

2. What should teams focus on in the presentation — content or communication?

Teams should focus on both content and communication in the oral presentation.

Content: The oral presentation should focus on a discussion of the overall issues in the case and the team's recommendations to address these issues. The presentation should follow a logical flow and should not contain the same amount of detail as the written report. Candidates are reminded to focus on the issues that the board is interested in. For example, the board isn't looking for a detailed discussion of the options that the team is not recommending, nor will the board be looking for a presentation of a detailed SWOT analysis of a company that they know intimately. For more information, refer to the Oral Presentation Evaluation Form and Oral Presentation Evaluation Form addendum available in the Content tab of D2L.

Communication: Teams should ensure that they address their audience in a clear and professional manner, maintaining eye contact, and conveying confidence and interest in the subject matter. For more information, refer to the Oral Presentation Evaluation Form and addendum on the Capstone 1 D2L site.

3. Are you permitted to use cue cards?

It is strongly recommended that teams **not** use cue cards, as they distract from the presentation and may make it seem as if the team did not prepare for their oral presentation adequately. Candidates may also want to consider that reading from cue cards limits eye contact and the use of gestures, both of which are points for consideration on the Oral Presentation Evaluation Form Addendum.

4. Can the team provide the panel with supplemental materials? If so, what kinds of material would be appropriate?

The panel is able to accept supplemental materials that meet three major objectives:

- They provide a framework for the presentation.
- They enhance audience understanding.
- They maintain audience attention.

Teams are prohibited from providing the panel with copies of their Capstone 1 report.

5. Is there a dress code for the oral presentation?

Yes. Team members should be dressed in appropriate business professional attire.

6. Are all team members expected to participate in the Q&A period of the oral presentation?

The expectation is that each candidate will answer at least one question. Team members should be able to speak about all topic areas of the Capstone 1 report and should decide in advance how they will allocate the questions asked of the team.

7. Is there a list of sample questions for the oral presentation? How should the team prepare for the Q&A?

A list of sample questions will not be provided to teams. Team members are encouraged to brainstorm the types of questions they could be asked and practise their answers to these questions before the oral presentation.

Appendix VI: Capstone 1 – Chat calls guide

The cloud conferencing platform Zoom will be used for the Week 3 and Week 6 chat calls in Capstone 1. Facilitators and candidates will meet virtually using the free version of the Zoom platform. While candidates are required to have functional computer audio, the use of video in the chat calls is optional. Once your team and the facilitator have confirmed the chat call dates and times via email, your facilitator will email you with the Zoom meeting information.

For information on how to install, test, and use Zoom, please read [Zoom's Getting Started Guide](#). Important setup specifications that are applicable for Capstone 1 are noted below.

Zoom account

If you do have a Zoom account already, sign in via your professional email address or dedicated Google credentials. Do **not** use your personal email address or Facebook account to sign in to Zoom. If you do not have a professional email address or a Google account that is dedicated for use as a PEP candidate, you can sign up for a [free account](#).

Day of chat call

About five minutes before the scheduled chat call start time, open the email you received from your facilitator through D2L and click on the meeting link. Log in using your professional email address as noted above. When asked, click on “Join with Computer Audio.”



Note: Due to CPA Canada’s best privacy practices, **recording of Capstone 1 meetings is not permitted**, and facilitators are asked to disable the recording feature.

If due to human error your meeting is recorded and you see a message stating that the meeting is being recorded, please alert your facilitator immediately in order to stop the recording.

Once the meeting has started, click on “Start Video” to enable your video camera.

Zoom technical support

For Zoom technical support, visit [Zoom Support](#).

Appendix VII: Capstone 2 preparation

The following is information for candidates regarding Capstone 2:

- Access to Capstone 2 will be granted in the same way as other modules, within one week of the module start date.
- There is a mandatory workshop at the beginning of Capstone 2.
- Candidates will need to complete pre-work prior to the module workshop. This pre-work requirement will be available once candidates have access to the Capstone 2 D2L site.
- In Capstone 2, candidates will have access to all module materials (including debrief materials) for all weeks at the beginning of the module. The purpose of this approach is to enable candidates to work on their own schedules as they study for the CFE.
- There is no examination at the end of Capstone 2.
- For details on the passing profile for Capstone 2, please refer to the [Capstone 2 Candidate Guide](#).
- Candidates who would like to begin preparing for Capstone 2 in advance of the module start can refer to the Introduction to Capstone 2 and the CFE Module in D2L and work through the materials in that module.

Appendix VIII: Commonly asked questions about the technical reviews and eBooks

Technical reviews

What is the adaptive learning platform?

The adaptive learning platform is a platform integrated with D2L that hosts the module-specific technical reviews that cover the CPA Canada Learning Library.

What is a module-specific technical review?

The technical reviews are an optional self-study resource to assist you in reviewing and developing your technical and enabling competencies, most of which are prerequisite knowledge. Refer to [The CPA Competency Map](#) to determine which competencies are prerequisite knowledge. The technical review includes learning tools that utilize the CPA Canada Learning Library, including:

- A custom study plan
- Diagnostics
- eBook chapters and knowledge check practice questions
- Adaptive reviews
- A question bank

How many technical reviews are there?

There is a module-specific technical review provided for each of the core and elective modules, and a Capstone technical review.

The core and elective module-specific technical reviews contain the recommended eBook chapters for that module. The Capstone technical review covers all eBook chapters and is an optional study tool for candidates in Capstone 1 and/or Capstone 2 to complete in preparation for Capstone 2 and the CFE.

Am I required to complete the technical review? Does it contribute to my overall module grade?

The technical reviews are optional to complete; however, they are a valuable resource for you to assess your proficiency level and increase your knowledge of the topics covered in each unit. At a minimum, we encourage you to review the recommended eBook chapters outlined in each unit for the core and elective modules.

Completion of the technical review does not contribute to your overall module grade.

How do I access the core and elective technical reviews?

There are two ways to access the core and elective technical reviews within D2L:

Module-specific D2L site:

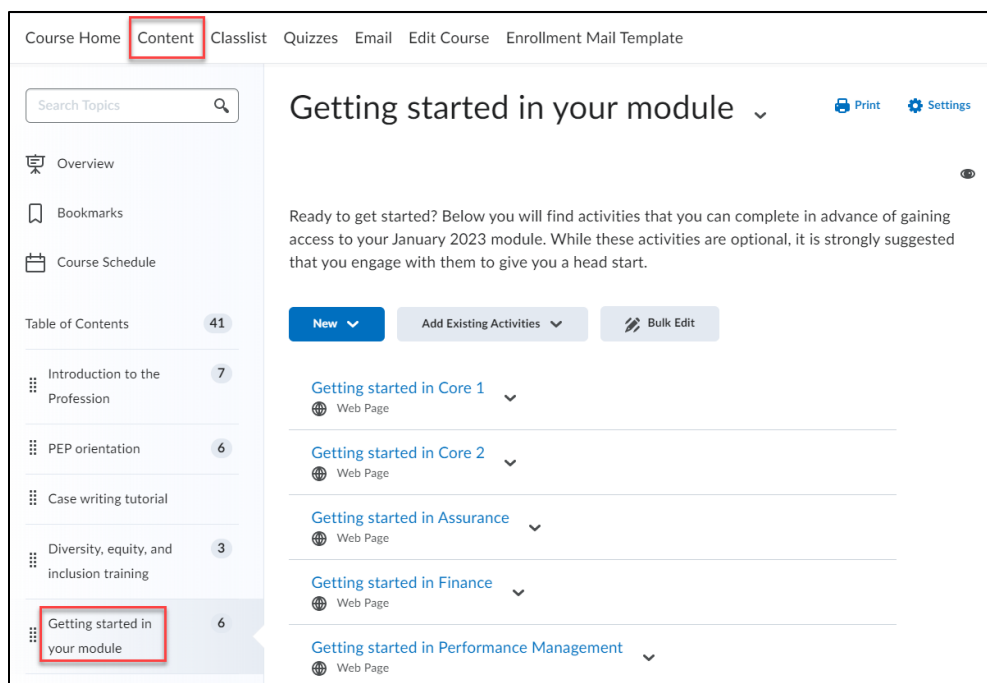
Note: you will have access this way only once you are enrolled in a module.

1. Select “Technical Review” from the navbar.



Introduction to the PEP module D2L site:

1. Select “Content,” then “Getting started in your module.”



2. Choose your module.

3. Select tab two, “Complete the technical review,” and the link “Access the technical review.”

Core 1

Getting started

Complete the optional activities below to get ready for your Core 1 module. Select each item below to learn more.

1. Learn about Core 1

2. Complete the technical review


Below you are provided with access to your module's technical review. This technical review is optional and includes:

- diagnostic assessments that evaluate your proficiency on all technical topics covered in the module, including commonly tested topics
- a personalized syllabus focused on technical topics where you require additional study
- tailored adaptive reviews that reinforce your learning and provide you with an opportunity for additional practice

The progress that you make within the technical review will give you a head start in your module.

The first time you enter the adaptive learning platform, you will be prompted to set up your learning plan.

Watch the [video](#) to learn how to set up your learning plan.

Access the [Core 1 technical review](#) 

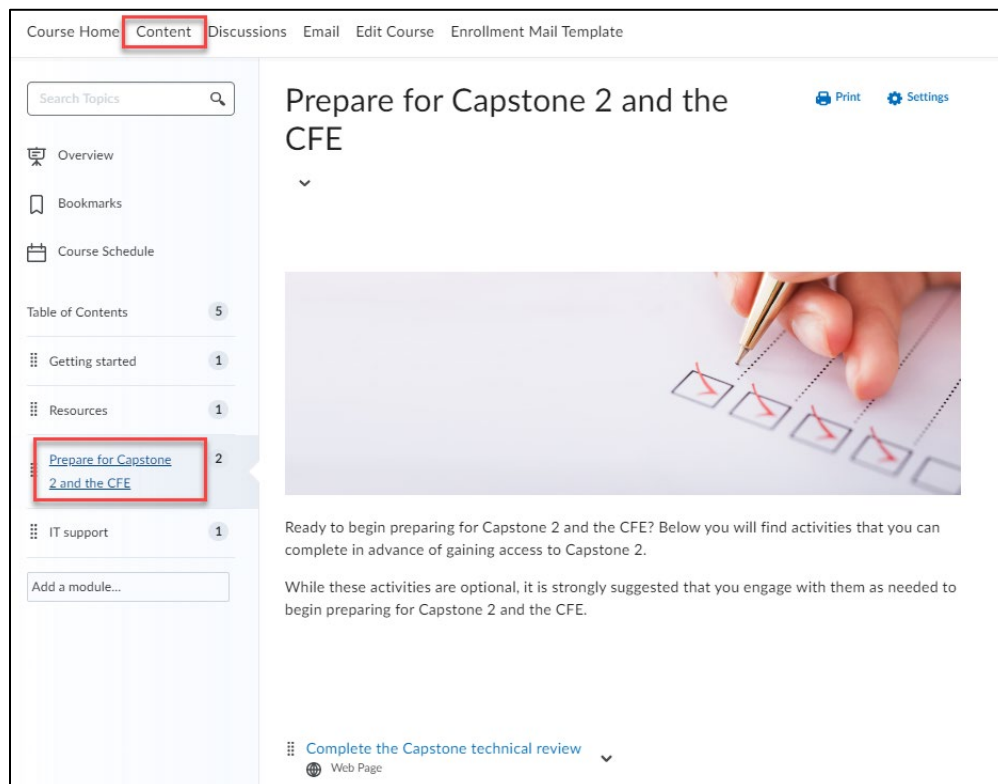
How do I access the Capstone technical review?

There are two ways to access the Capstone technical review within D2L:

[Introduction to Capstone 2 and the CFE module D2L site:](#)

Note: You will only have access to this module once you are enrolled in the Capstone 1 and/or Capstone 2 module.

1. Select “Content,” then “Prepare for Capstone 2 and the CFE.”



The screenshot shows a D2L course interface. At the top, the navigation bar includes 'Course Home', 'Content', 'Discussions', 'Email', 'Edit Course', and 'Enrollment Mail Template'. The 'Content' tab is highlighted with a red box. Below the navigation bar is a search box labeled 'Search Topics'. On the left side, there is a sidebar menu with options: 'Overview', 'Bookmarks', 'Course Schedule', 'Table of Contents', 'Getting started', 'Resources', 'Prepare for Capstone 2 and the CFE', and 'IT support'. The 'Prepare for Capstone 2 and the CFE' item is highlighted with a red box. The main content area displays the title 'Prepare for Capstone 2 and the CFE' with 'Print' and 'Settings' icons. Below the title is a dropdown arrow and a large image of a hand checking off a list. The text below the image reads: 'Ready to begin preparing for Capstone 2 and the CFE? Below you will find activities that you can complete in advance of gaining access to Capstone 2. While these activities are optional, it is strongly suggested that you engage with them as needed to begin preparing for Capstone 2 and the CFE.' At the bottom, there is a link 'Complete the Capstone technical review' with a 'Web Page' icon.

2. Select “Complete the Capstone technical review” and the link “Access the Capstone technical review.”

Complete the Capstone technical review

Instructions


Below you are provided with access to your module’s technical review. This technical review is optional and includes:

- diagnostic assessments that evaluate your proficiency on technical topics
- a personalized syllabus focused on technical topics where you require additional study
- tailored adaptive reviews that reinforce your learning and provide you with an opportunity for additional practice

While completing the technical review, you will be prompted to complete and debrief DAIS activities and practice cases. Completion of the DAIS activities and practice cases is optional. The practice cases and solutions were used in prior offerings of Capstone 2 and are based on past CFE cases. [These practice cases and supporting materials have not been updated for all changes to the Handbook, Income Tax Act, or case-writing best practices.](#)

Complete the technical review

The first time you enter the adaptive learning platform, you will be prompted to set up your learning plan.

1. Watch the [video](#) to learn how to set up your learning plan
2. Access the [Capstone technical review](#) 
3. Download the [study plan materials](#) that will be a part of your syllabus

Select each unit below to learn more.

Introduction to the PEP module D2L site:

1. Select “Content,” then “Getting started in your module.”
2. Choose “Prepare for Capstone 2 and the CFE.”
3. Select the link “Access the Capstone technical review.”

I am looking for a specific chapter in the eBook. How do I find the chapter I am looking for?

If you know which module the chapter is covered in, access that module-specific technical review. If you are unsure which module covers the chapter you are looking for, access the Capstone technical review located in the Introduction to the PEP D2L site.

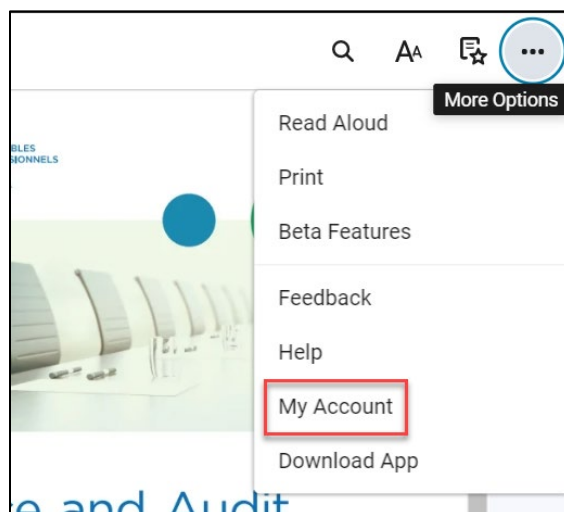
Once you are in the technical review, select “Syllabus” and find the related chapter within a unit. If you know the eBook volume you wish to open, select any chapter from that volume to open the eBook in VitalSource. Once the eBook is open, you can navigate to the chapter using the table of contents.



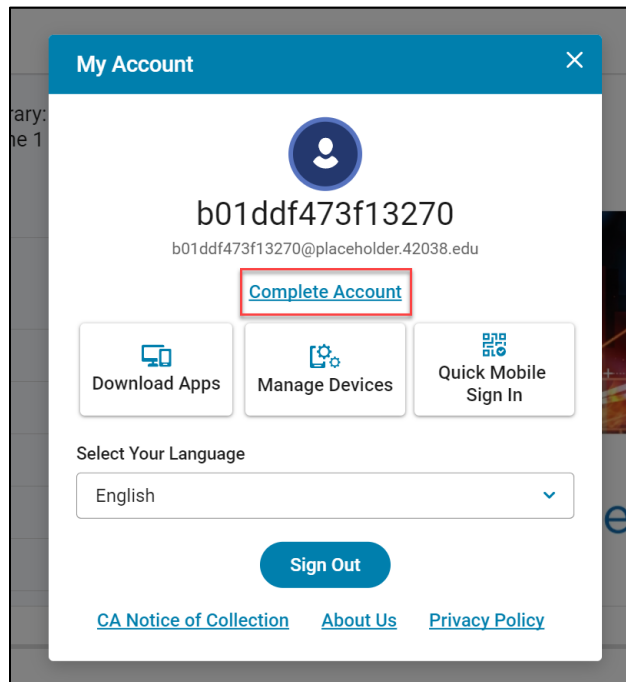
Can I access the eBooks directly through the VitalSource website instead of navigating through the technical review each time?

To access the eBooks directly from the VitalSource website, you must first pair your automatically generated VitalSource account to a personal VitalSource account as follows:

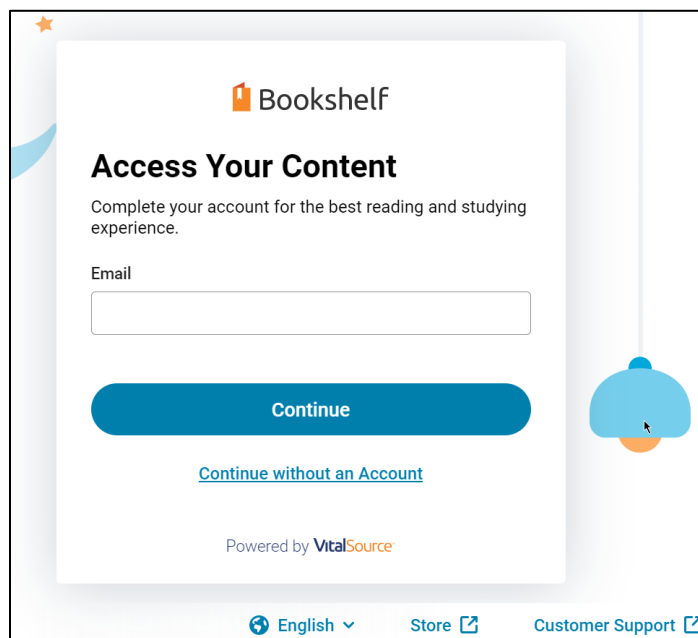
1. Enter the technical review and open the eBook volume you would like to access.
2. Under “More Options,” select “My Account.”



3. Select “Complete Account.”



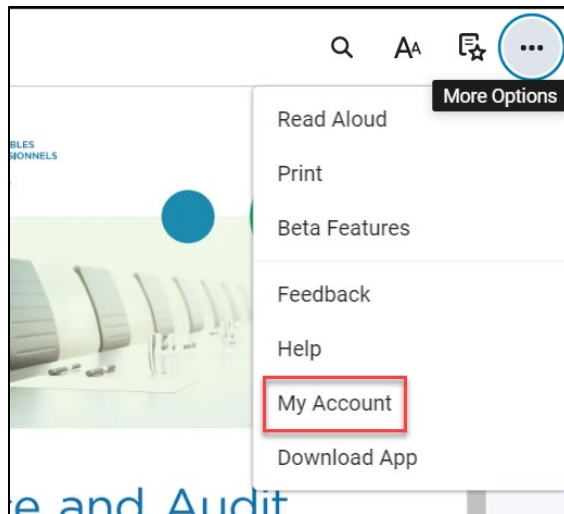
4. Sign up using your preferred email. If you have an existing VitalSource account, you can use your account email. Alternatively, you can sign up for a new account.



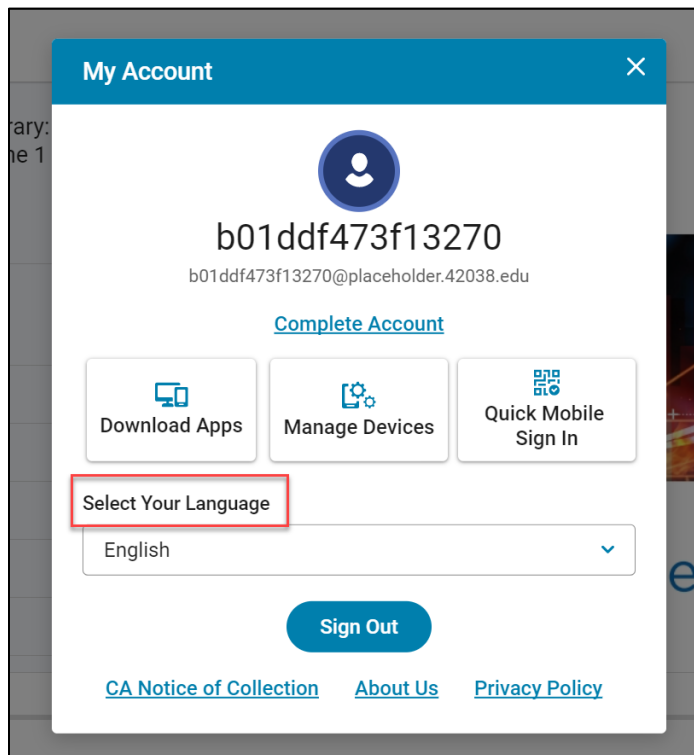
Once your account is paired, the eBook you accessed will be accessible from [your bookshelf](#). To add additional eBook volumes to your bookshelf, you will need to open each of the volumes from the technical review as demonstrated above.

How do I change the default language for VitalSource?

1. With VitalSource open, select “More Options” and then “My Account.”



2. Select your language from the list.



Note that VitalSource's default user interface language is English.

Can I use the VitalSource desktop reader application?

We do not suggest using the VitalSource desktop reader application for Windows computers, as some layout boxes in the eBook do not display appropriately in the

desktop application. We suggest that you access the online version of the eBooks through the technical review or the web browser version of the VitalSource bookshelf.

How is the Capstone technical review different from the core and elective technical reviews?

The Capstone technical review is an optional study plan introduced to Capstone 1 candidates to complete in preparation for Capstone 2 and the CFE. It is made up of units that cover the entire eBook. It is not recommended that candidates complete the Capstone technical review prior to completing the core and elective modules. It is intended to help candidates prepare for Capstone 2 and the CFE.

When can I access the technical reviews?

All active PEP candidates can access any of the technical reviews from the Introduction to the PEP module in D2L, regardless of when candidates are enrolled in their upcoming module's D2L site.

If I am studying for a challenge exam, will I be able to access the technical reviews?

Yes. As an active PEP candidate, you will be able to access all technical reviews from the Introduction to the PEP module in D2L to prepare for your upcoming examination.

When I first enter the technical review, it prompts me to set up a custom study plan. What is a study plan?

The custom study plan is an optional tool that schedules all activities within the technical review based on the time you have available to study. You will be prompted to enter:

- The date you want to start studying
- The date you want to complete your studying (end date)
- The days of the week you are available for study
- The hours per day you are available for study

When do you want to start and end studying?
We'll build a study plan to fit your schedule.

< > | End Date < >

How many hours a week do you wish to study?
You can make further adjustments at any time. Total estimated hours needed - 271 hours

<input checked="" type="checkbox"/> Sun	<input type="range" value="2"/>	2hrs	Time Allotted: 14 hrs / week
<input checked="" type="checkbox"/> Mon	<input type="range" value="2"/>	2hrs	
<input checked="" type="checkbox"/> Tue	<input type="range" value="2"/>	2hrs	
<input checked="" type="checkbox"/> Wed	<input type="range" value="2"/>	2hrs	
<input checked="" type="checkbox"/> Thu	<input type="range" value="2"/>	2hrs	
<input checked="" type="checkbox"/> Fri	<input type="range" value="2"/>	2hrs	
<input checked="" type="checkbox"/> Sat	<input type="range" value="2"/>	2hrs	

Cancel

Using this information, the adaptive learning platform will create a study plan that fits your personal study schedule. It will set the due dates for all activities included within the technical review.

In the study plan, what should I enter as my start studying date and end studying date?

You can start studying any time before the module starts or after the module has already started. It is suggested that you finish studying prior to the end of the module to leave time for exam review.

The number of hours I can study per week does not meet the minimum number of hours required to save my study plan. What do I do?

The study plan assumes you will be completing all activities within the technical review. If the number of hours you can devote to studying does not allow you to save your study plan, you can increase the number of hours available for study to be able to save your study plan or increase the date range of your study plan. For example, if you plan to devote four hours per week to study over eight weeks, and you receive a warning that your planned end date must be before your selected end date, you won't be able to save your study plan. Increase the number of hours and/or the date range that you plan to study by modifying the start and finish dates until the warning disappears. Then, save your study plan.

Do I need to follow the syllabus as scheduled by my study plan? What happens if I fall behind and can't keep up with the due dates shown in the syllabus?

The study plan is an optional tool within the technical review that schedules the due dates for all activities within the syllabus according to your availability to study. You are not required to set up a study plan, nor are you required to follow the suggested due dates in the study plan. There is no penalty if you fall behind and do not complete the activities by the date suggested in the study plan. Regardless of the due dates noted, it is recommended that you complete all unit activities together as noted in your module's D2L site, starting with the recommended chapters within the technical review with the eBook.

If needed, you can reset your study plan anytime to reschedule all future activities by accessing the study plan from the menu located in the top left of the technical review.

How do the diagnostics work?

There is an optional diagnostic to complete at the start of each unit. The diagnostics are used to assess your proficiency with the technical topics covered in that unit and identify eBook chapters requiring further study. The diagnostics are designed to be taken at the beginning of a unit to assist you in determining which chapters require further study in that unit.

How does the syllabus work?

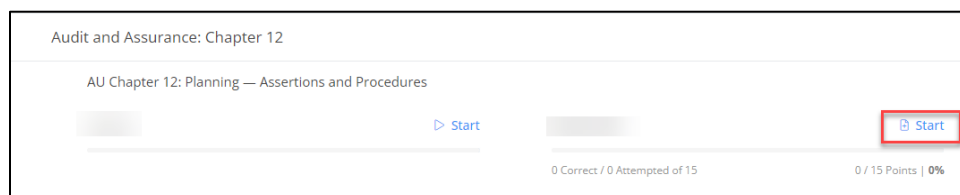
The technical review syllabus outlines the recommended eBook chapters for that module. Based on your results in the diagnostic, it is suggested that you focus on eBook chapters that require further study and skip chapters that you feel do not require further study.

How do I access the practice MCQs?

Practice MCQs are housed within the technical review. They are optional to complete and can be accessed in two ways:

1. Knowledge check

Within the syllabus, select the relevant eBook chapter, and select "Start" beside the knowledge check. Note that the knowledge check presents a limited selection of MCQs for that chapter. To access all MCQs for a chapter, navigate to the question bank (see instruction below).



2. Question bank

To access the question bank, select “Question bank” from the left-hand navigation, and then select “Create activity.” Note that the question bank contains all related MCQs for each eBook chapter.

What are the adaptive reviews and how do they work?

The adaptive reviews are optional. If you choose to complete them, we recommend you proceed through the chapters before starting them. Adaptive reviews reinforce your learning and provide an opportunity for additional practice. They consist of no more than 30 questions. The first 15 questions are “baseline” questions of a moderate difficulty. Your performance is monitored on these questions, and the remaining question difficulty will increase or decrease. If you’re struggling, the difficulty of the questions will decrease. If you are performing well, the difficulty of the questions will increase to challenge you. You will receive a personalized report at the end of your adaptive review that highlights your strengths and weaknesses to assist you with your debrief.

If I start the technical review through the Introduction to the PEP module, and then access the technical review from my module, will my progress be saved?

Yes. All progress made in any technical review will be saved whether it is accessed from Introduction to the PEP or within your module’s D2L site. This is also true for any technical reviews completed for future modules, if you choose to access the technical review for a module you are not currently participating in.

How do I find the recommended eBook chapters for my module?

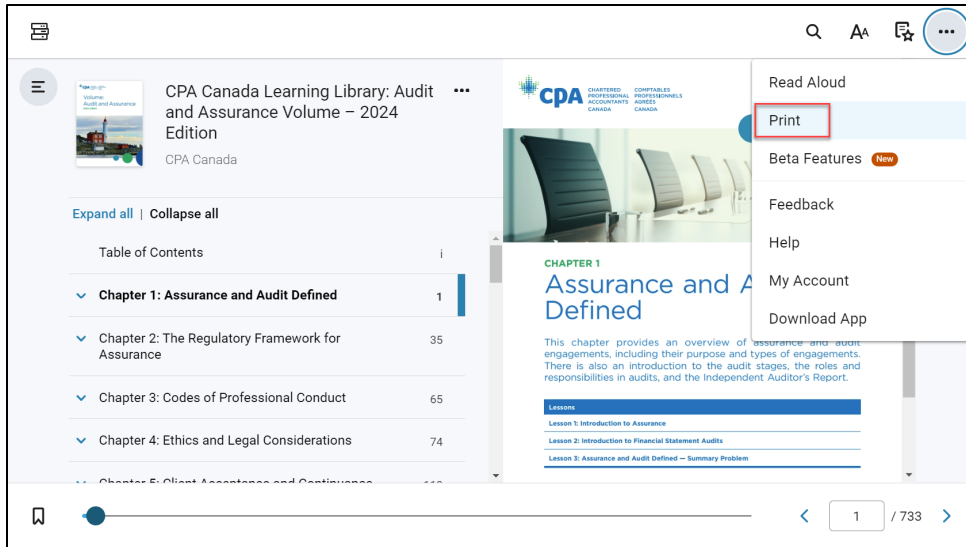
Refer to the syllabus for your module.

How do I prioritize which chapters I should read?

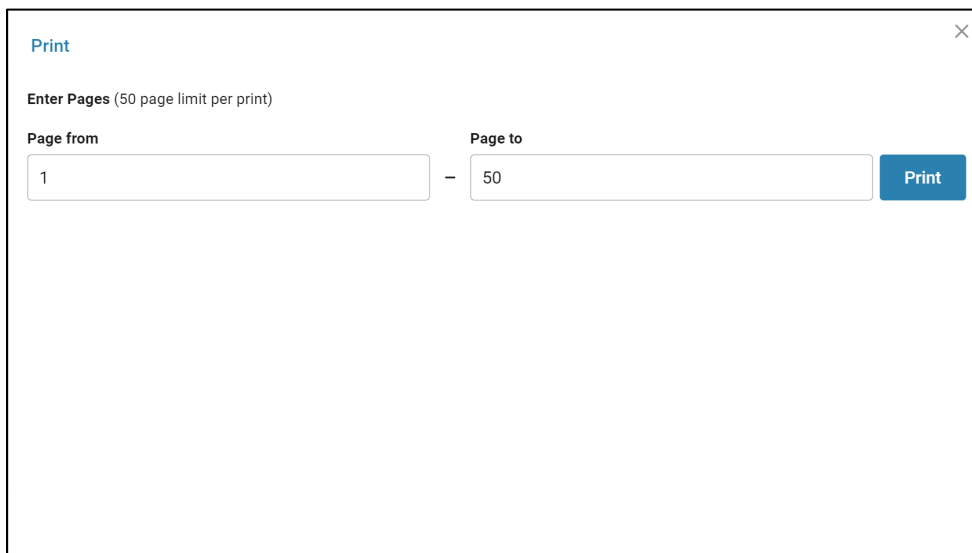
You are encouraged to use the diagnostics at the start of each unit to determine which chapters to focus on reviewing. You should use your judgment on how much time you spend reviewing each chapter and which eBook tools to utilize. You can utilize the additional chapter resources, such as the e-lessons, examples, summary problems, and knowledge check practice questions at your discretion. For example, a candidate who requires assistance in learning a particular competency may choose to utilize all the additional resources, whereas a candidate who is proficient with that competency may decide not to use the additional resources. You are not required to use all resources.

How do I print the eBooks?

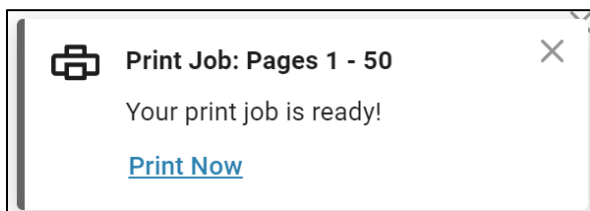
Open the eBook in VitalSource, either through the bookshelf (see FAQ above) or through the adaptive platform. Once you are in VitalSource, select “Print” from the menu.



Select the page range that you would like to print and select “Print.” Note that the maximum number of pages to print at one time is 50 pages to avoid timeout.



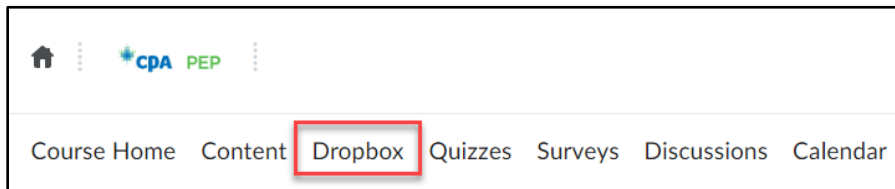
Once your print job is ready, select “Print Now” and follow the instructions on your computer to save the document as a PDF or to print to a personal printer.



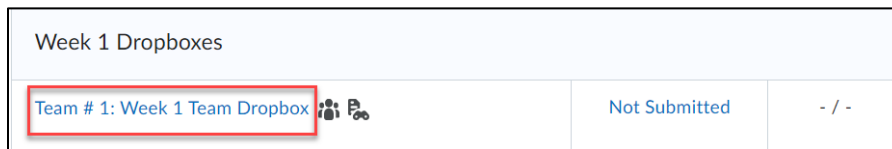
Appendix IX: How to submit files to the dropbox

Use the following steps to submit files to the dropbox.

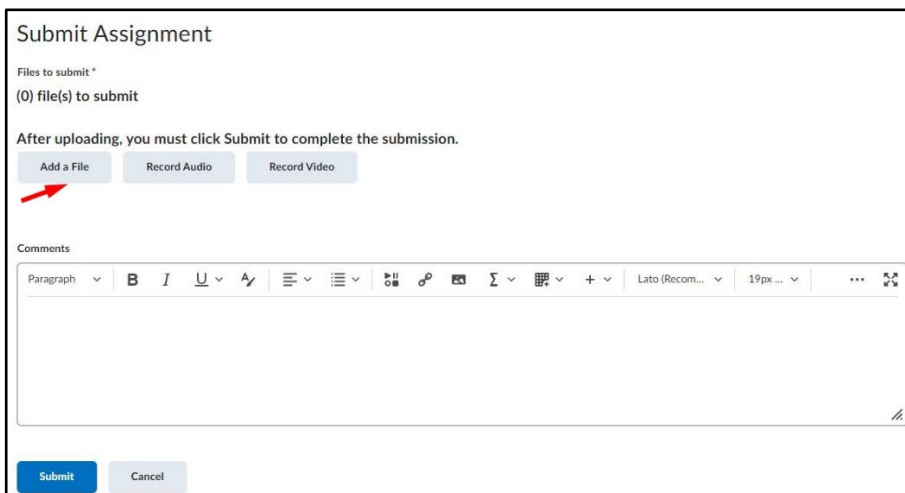
1. Within the module, select the “Dropbox” tab.



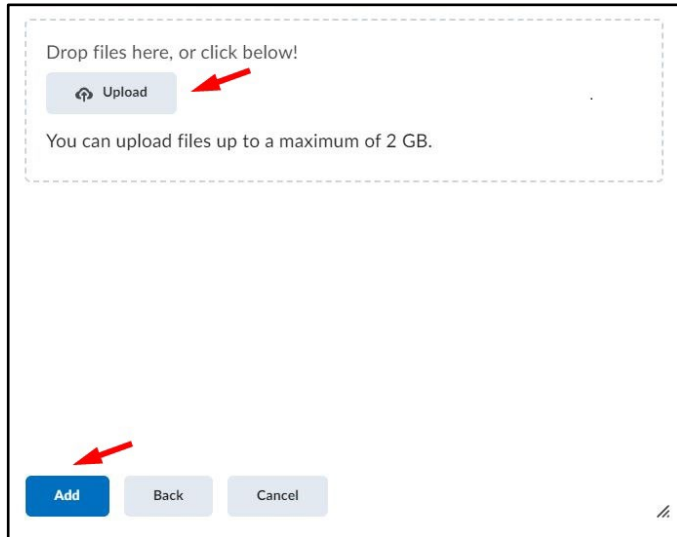
2. Select the applicable dropbox for the activity that you are submitting.



3. Click “Add a File.”



4. Drag and drop files or click “Upload” to select the files from your computer. Ensure you select all files (as applicable) for your submission, and that the files are named in accordance with the appropriate naming convention. Once the files are uploaded, click the “Add” button.



5. Make sure that the correct files have been uploaded.
6. Then select “Submit.”

