Pre-approved Program Manager
PERT User Guide
Effective June 2018
<table>
<thead>
<tr>
<th>CPA provincial/ regional bodies</th>
<th>CPA Practical Experience Requirements contact information</th>
</tr>
</thead>
</table>
| CPA Alberta                      | Email: practicalexperience@cpaalberta.ca  
  Phone: 403.269.5341                                      |
| CPA Atlantic Region              | Email: practicalexperience@cpaatlantic.ca  
  Phone: 902.429.4494                                      |
| CPA British Columbia            | Email:  
  • PER/PERT inquiries: cpabcper@bccpa.ca  
  • Mentor inquiries: mentor@bccpa.ca  
  Phone: 604.872.7222                                      |
| CPA Canada — International       | Email: internationalinquiries@cpacanada.ca               |
| CPA Manitoba                     | Email: practicalexperience@cpamb.ca  
  Phone: 204.943.1538                                      |
| CPA Ontario                      | Email:  
  • practicalexperience@cpaontario.ca  
  • Mentor inquiries: mentor@cpaontario.ca  
  Phone: 416.962.1841 or 1.800.387.0735                     |
| Ordre des comptables professionnels agréés du Québec | Email : Stages@cpaquebec.ca  
  Phone: 1.800.363.4688 [2615]                           |
| CPA Saskatchewan                | Email: practicalexperience@cpask.ca  
  Phone: 306.359.0272                                      |
| CPA Canada Toronto Head Office  | Email: member.services@cpacanada.ca  
  Phone: 416.977.0748 or 1.800.268.3793                      |
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1 Introduction to PERT

The CPA Practical Experience Reporting Tool (PERT) helps CPA students/candidates document the development of their technical and enabling competencies in order for them to be assessed and recognized by the profession.

The PERT User Guide outlines how to use PERT, and provides further guidance on how Pre-approved Program Managers (PM) can view student/candidates’ experience reports in order to prepare for meetings, and to document these meetings in PERT.

Pre-approved Program Manager Role

Programs Managers have the ability to see the full student roster for their Pre-approved Program. This mandatory role allows Program Managers to:

• Confirm a CPA student/candidate’s employment status in the organization including job start date, program/location details and whether a CPA mentor has been assigned to the student/candidate
• View the status of all future CPAs within your pre-approved program, along with all of their experience reports, including self-assessments, mentor reviews and profession assessments
• Indicate when employment has ended with their Pre-approved program.
Create your password

Once your provincial/regional CPA body has added you as a Program Manager in PERT, you will receive a confirmation email that contains a link to PERT and instructions to set up your password.

To create your password for the first time, follow these steps.

1. From the confirmation email, click the link to log on to the PERT. The Create Your Password screen appears.

Note: The link to access this portal view set up is valid for 30 days only and should only be used for the initial set up of your program manager role. After 30 days this link will expire.

2. Enter and confirm your new password.

   Note: Passwords are required to be a minimum of six characters in length, and must have at least one letter and at least one number.

3. Click Create Password. If you are successful in creating your password, you will be prompted to sign-in to PERT.
Sign In

1. To sign in, enter your **Email Address** and **Password**.

2. Click **Sign In** to access the PERT.

   **Note:** The URL to log in as a Program Manager is [https://pert.cpa-services.org/ProgramManager/Logon](https://pert.cpa-services.org/ProgramManager/Logon).

Reset Password

If you need to reset your password, follow these steps.

1. From the Pre-approved Program Manager Sign-In screen, click **Do not know your password**. The Reset Password screen appears.
2. Enter the email address you provided at the time of registration for your CPA pre-approved program.

3. Click **Send**. The *Reset Password* screen displays confirming that an email has been sent for you to reset your password.

4. Close this screen and check your email for the password reset message.

5. Within the email message, click the link to reset your password.

**PERT Users Who Play Multiple Roles**

Some PERT users play multiple roles such as Program Manager, Program Leader and CPA Mentor. When logging into the portal, users who play more than one role will see their various roles along the left side.

When logged into PERT you will see a summary page. This page is meant to act as a summary of your action items. To complete your action items you can:

1. Click on the header to be taken to your Candidate screen,
2. Click on the Name field to be directed to the Student/Candidate landing page (Experience Reports), or
3. Select Candidates under the appropriate heading on the left side.
3 Student/Candidate Details

Detail Verification

As a Program Manager, you will be notified when a student/candidate updates their PERT profile to indicate employment in your Pre-approved Program. PERT will send you a system generated email requesting that you log onto PERT to verify the student/candidate's employment information.

To verify the student/candidate's information, follow these steps.

1. Log in to PERT as a Program Manager (https://pert.cpa-services.org/ProgramManager/Logon). Once logged in, you will be able to see a full listing of students who have indicated employment in your pre-approved program.
2. You will be required to verify the following information for students/candidates who have Employment Confirmation Required associated with their PER Status:
   a) Program
   b) Location
   c) Start Date
   d) Mentor

   **Note:** Program Managers have the option to “Show Pending Only” to identify students requiring Employment Confirmation:

**Incorrect Program, Location or CPA Mentor**

1. If the details for Program and/or Location and/or CPA Mentor are inaccurately reported, select **Follow up**, enter comments about what is incorrect and click **Yes**.

   ![Students/Candidates Table]

2. Then click **Submit** and your changes will be saved. The follow-up date will update and an automated email is sent to the student/candidate that includes your comments about what needs to be changed in order for their employment to be confirmed. Until the student/candidate updates their information you should not be confirming them into your program.
**Missing Start Date or CPA Mentor**
If an employment start date or a CPA Mentor has not been indicated, you will not be able to confirm a student’s/candidate’s employment.

1. Select **Follow up**, enter in comments as to what information is missing, click **Yes** and click **Submit**. This will generate an automated email to student/candidate that includes your comments about what is needed to confirm their employment in your program.

2. Once the student/candidate has created an experience report and added their CPA Mentor, the next time you log as a Program Manager, the **Yes** option will be available.
**Student/Candidate is Not in Your Pre-approved program**
If the student/candidate is not in your pre-approved program, select **No**, enter comments, click **Yes** and click **Submit**. By submitting No, the student/candidate is notified of your comments by email. Also, they are removed from your program, their experience reports related to your program are cancelled, and their PER Status is updated to Unemployed.

**Employment Confirmation**
Once you have verified all of the student/candidate’s employment details, you will then be ready to complete the confirmation process.

Select **Yes**, and click **Submit** and your changes will be saved. The student will have their PER Status updated to In progress and receives an automated email that you have completed the employment confirmation.
4 Experience Reports

As a Pre-approved Program Manager, you will not be expected to review or assess experience reports. However, your Program Leader may ask that you ensure students/candidates are completing their semi-annual self-assessment and meeting regularly with their CPA mentor. As a Program Manager, you can verify whether this has occurred and provide feedback to your Program Leader. Please check with your program leader to advise the level of support they are seeking from you. Therefore, the following section is for information only. It provides an overview of a student/candidate’s experience report and the associated processes around its review and assessment.

Student/Candidate Details

When you log in as a Program Manager, your initial view will display a full listing of all students/candidates in your Pre-Approved Program.

To view a student/candidate’s practical experience details, click the name of the student/candidate from the Name column. The experience details for the student/candidate appear with the Experience Report section in view.
**Note:** You can sort students/candidates alphabetically by clicking any name in the Name column. You can use the search function to search for a student/candidate by their Last name only.

To view the details of an experience report, from the Report Details section, click **Employer** or **Position**.

**Note:** You will only be able to view the details for those positions from within your pre-approved program. Experience reports outside your pre-approved program are restricted for confidentiality reasons.
Here is summary of the information that is displayed:

<table>
<thead>
<tr>
<th>Detail</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PER Status</td>
<td>Indicates the student/candidate’s current status in fulfilling their practical experience requirements.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Pending Enrolment</strong>: Action is required on your part. See the <em>Detail Verification</em> section for more information. This status will display as Pending Enrolment in the student/candidate’s profile until employment is confirmed.</td>
</tr>
<tr>
<td></td>
<td>• <strong>In Progress</strong>: The employment details have been confirmed and the practical experience term is in progress.</td>
</tr>
<tr>
<td></td>
<td>• <strong>PER Standard Met</strong>: The student/candidate has met all the practical experience requirements.</td>
</tr>
<tr>
<td></td>
<td>If any other information is displayed, please contact your local PERT administrator.</td>
</tr>
<tr>
<td>Next Profession Assessment</td>
<td>Display the next scheduled time in which your CPA body will assess the student/candidate’s experience. This is a read-only field, as it is populated by the profession.</td>
</tr>
<tr>
<td>Next Mentor Review</td>
<td>The date displayed indicates the next scheduled mentor review meeting. Initially, this date is set automatically by PERT, six (6) months from the date the PER Status is set to <em>In Progress</em>. After the first mentor review has occurred, the mentor will be required to update this date.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: There is no limit to how far out in the future the meeting can be set by the mentor and therefore it is recommended you provide your mentors guidance in this area.</td>
</tr>
<tr>
<td>PER Effective Date</td>
<td>The date that the student/candidate begins accumulating practical experience. Any work experience achieved after this date will be considered current experience and any experience accumulated before this date is considered prior experience for PERT reporting. A student/candidate is eligible to claim up to 12 months of prior experience accumulated within the preceding 5.5 years.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current status of the student/candidate’s experience report(s).</td>
</tr>
<tr>
<td></td>
<td>• <strong>New</strong>: Indicates that a student/candidate has created a report but has not completed updating it.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Verified</strong>: Indicates a student/candidate has created the experience report, updated any technical and enabling competencies that apply for that reporting period, and has selected <em>Submit</em> on the report.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Follow-up</strong>: Indicates that a student/candidate has altered a report in the Verified status but has not selected <em>Submit</em> on the report.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Reviewed</strong>: Indicates that your CPA body has reviewed and assessed the experience report. Only CPA reviewers can set a report to this status.</td>
</tr>
<tr>
<td>Report type</td>
<td>• <strong>Current</strong> — experience accumulated after your PER Effective date</td>
</tr>
<tr>
<td></td>
<td>• <strong>PRIOR EV</strong> — experience accumulated before your per effective date and is experience verification route type experience</td>
</tr>
<tr>
<td></td>
<td>• <strong>PRIOR PPR</strong> — experience accumulated before your per effective date and is pre-approved program route type experience</td>
</tr>
<tr>
<td></td>
<td>• <strong>Catch up</strong> — previously approved legacy experience</td>
</tr>
</tbody>
</table>
Status

The *Status* section displays read only information related to *Experience Report Status*, *Status Change Date*, *Calculated Duration* and *Duration Recognized* (if the report has been approved by a CPA Reviewer).

<table>
<thead>
<tr>
<th>Report Details</th>
<th>Technical Competencies</th>
<th>Enabling Competencies</th>
<th>Notes</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Details</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status: New</td>
<td>Calculated Duration: 1.74 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Change Date: 27/04/2018</td>
<td>Duration Recognized:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Position</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report Type: Current Experience</td>
<td>Experience Type: Pre-approved Program</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Title: Teter</td>
<td>Employer: Erin &amp; Joshua Company</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Position: Property Accountant</td>
<td>Months on Secondment:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Type: Permanent</td>
<td>Start Date: 02/01/2018</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avg Hrs/Wk: 35.00</td>
<td>End Date: 23/02/2018</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave Taken (days): 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You do not have access to edit this information as it is for review purposes only.
Position
The Position section displays read only details associated with the position held by the student/candidate.

**Note:** While you do not have access to edit this information, you should review it for accuracy. If details are incorrectly listed please follow up with student/candidate to correct any inconsistencies noted. It is important that start date, end date and leaves taken are accurately reported. Leaves taken constitute any time taken away from work for things such as vacation, sick leave, professional development, and/or study leave.

<table>
<thead>
<tr>
<th>Report Details</th>
<th>Technical Competencies</th>
<th>Enabling Competencies</th>
<th>Notes</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status: New</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Change Date: 23/04/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calculated Duration: 1.74 months</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duration Recognized:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Position</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report Type: Current Experience</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Title: Taxer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Position: Property Accountant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Type: Permanent</td>
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<td></td>
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</tr>
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<td>Avg Hrs/Wk: 35.00</td>
<td></td>
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<tr>
<td>Leave Taken (days): 0</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Experience Type: Pre-approved Program</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer: Erin &amp; Joshua Company</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Months on Secondment:</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Start Date: 02/01/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date: 23/02/2018</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Employer information**
The *Employer Address, Employer Profile* and *Supervisor Verification* are typically blank. The majority of pre-approved programs will not require supervisor verification. Please contact your provincial/regional CPA representative if you would like to learn more about this feature and how it could work in your pre-approved program.
Technical Competencies

To view the student/candidate’s self-assessment of technical competency development during the reporting period, follow these steps.

1. From within the student's/candidate's experience report, click the Technical Competencies section.

2. Click any of the six technical competency areas.

The details of the reported technical competency are displayed, which includes the various competency sub-areas, a description of the job duties relevant to the sub-area, the student’s/candidate’s self-assessed proficiency value, and supervisor verification details.

Note: The competency map has been pre-populated for students/candidates in pre-approved programs.
The **Target Proficiency** column displays the proficiency level that the student/candidate expects to achieve by the **end of the period of practical experience**. The **Self-assessed Proficiency** column displays the level of proficiency in which the student/candidate self-assessed to have achieved at the **end of the current reporting period**.

<table>
<thead>
<tr>
<th>Competency Sub-Area</th>
<th>Target Proficiency</th>
<th>Circumstance</th>
<th>Complexity</th>
<th>Autonomy</th>
<th>Self-Assessed Proficiency</th>
<th>Profession Assessed Proficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal control</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Enabling Competencies**

Enabling competency development is discussed and reviewed by the CPA student/candidate and their CPA mentor on a semi-annual basis. Any concerns should be discussed with the student/candidate’s CPA mentor.

To view the student’s/candidate’s self-assessment of enabling competency development during the reporting period, click the **Enabling Competencies** section. The **Reflective Questions** screen appears.

<table>
<thead>
<tr>
<th>Reflective Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 1: Professional and Ethical Behaviour</td>
</tr>
</tbody>
</table>

Students/candidates track their enabling competency development by responding to five, three-part questions. Each question is related to one of the five enabling competencies, and two summary questions.

**Note:** Students/candidates are not required to answer all questions each reporting period, only the enabling competencies they have developed during that time.
Summary Questions
Students/candidates are required to answer both summary questions, irrespective of how many enabling competencies they achieved during the period.

For Question A, students/candidates should set specific development targets between meetings with their CPA mentors.

<table>
<thead>
<tr>
<th>Summary Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Question A</strong></td>
</tr>
<tr>
<td>Identify key competency areas (enabling and/or technical) you will focus on developing or improving between now and your next meeting with your mentor. What is your action plan for doing so?</td>
</tr>
</tbody>
</table>

| **Question B** |
| Looking back at your experience captured in this report, in which competency areas (enabling or technical) do you feel most confident in your abilities and why? |

Notes
The Notes section contains all the status changes of the experience reports, as well as any notes entered by CPA reviewers and/or CPA mentors.

Attachments
Students/candidates are able to attach files, such as resumes or job descriptions, to their experience reports. To view the attached files, follow these steps.

1. Click the **Attachments** tab.

2. To review an attached file, click the file to open it.
5 Consolidated Summary

Pre-approved Program Leaders may request your support to complete a review of student/candidates’ experience report(s). Use the information in the Consolidated Summary section to view the overall progress of a student/candidate. This feature is particularly useful when a student/candidate has multiple employment/experience reports.

To view a consolidated summary report, select the experience reports to be included in the consolidated summary and click Assess. Only verified or reviewed reports should be included. (It may take a few moments for the summary to appear) ‘Assess’.
Duration Requirement

The *Duration Requirement* section provides an overview of the number of leave weeks reported by the student/candidate, and any duration penalties applied by the provincial/regional CPA body and the projected Duration Required adjusted for the leave weeks taken in excess of the 20 weeks allowance and penalty. A leave includes time away from work for such reasons as vacation, sickness, professional development, and/or study time, and is reported in weeks.

<table>
<thead>
<tr>
<th>Duration Requirement</th>
<th>3.2 weeks</th>
<th>20 allowable leave weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reported Leave</td>
<td>13 months</td>
<td>13 month penalty</td>
</tr>
<tr>
<td>Duration Penalty</td>
<td>43 months</td>
<td>30 months (adjusted for leave in excess of allowance and penalty)</td>
</tr>
</tbody>
</table>

Eligible Practical Experience

The *Eligible Practical Experience* section provides an overview of the eligible practical experience completed by a student/candidate. It is separated by *Prior and Current Experience*, as well as experience before and after PEP start date. Current experience is experience accumulated after a CPA student’s/candidate’s Practical Experience Requirement (PER) effective date. Prior experience is any experience accumulated before the PER effective date. A CPA student/candidate is eligible to claim up to 12 months of prior experience from the preceding 5.5 years. CPA students/candidates may accumulate up to 18 months of qualifying practical experience before commencing the CPA Professional Education Program (PEP). No further qualifying experience will be recognized beyond 18 months until they register in the CPA PEP.
The summary indicates whether the student/candidate has met the required duration.

<table>
<thead>
<tr>
<th>Eligible Practical Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Experience</td>
</tr>
<tr>
<td>Current Experience</td>
</tr>
<tr>
<td>Experience Before PEP Start Date</td>
</tr>
<tr>
<td>Experience After PEP Start Date</td>
</tr>
<tr>
<td>Penalty</td>
</tr>
<tr>
<td>Total Eligible Duration</td>
</tr>
</tbody>
</table>

**Competency Assessment**

The *Competency Assessment* section indicates whether the student/candidate has met the specified technical and enabling competency requirements.
Technical Competencies
To view more information on the details of the technical competencies within the consolidated summary, follow these steps.

1. View **Technical**. The list of technical competencies and sub-competencies appear.

```
<table>
<thead>
<tr>
<th>Technical</th>
<th>Financial Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Financial reporting needs and systems</td>
</tr>
<tr>
<td></td>
<td>Accounting policies and transactions</td>
</tr>
<tr>
<td></td>
<td>Financial report preparation</td>
</tr>
<tr>
<td></td>
<td>Financial statement analysis</td>
</tr>
</tbody>
</table>
```

2. For a detailed view, select a technical sub-competency. A summary of student/candidate responses, position duties, circumstance, complexity, autonomy, target proficiency, self-assessed proficiency, profession assessed proficiency, duration, and status are displayed.

```
<table>
<thead>
<tr>
<th>Technical</th>
<th>Financial Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Financial reporting needs and systems</td>
</tr>
</tbody>
</table>

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<th>Complexity</th>
<th>Autonomy</th>
<th>Target Proficiency</th>
<th>Self-Assessed Proficiency</th>
<th>Profession Assessed Proficiency</th>
<th>Duration</th>
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<td>Routine</td>
<td>Moderate</td>
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<td>Level 0</td>
<td>Level 0</td>
<td>1.74</td>
<td>New</td>
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</tbody>
</table>
```
Enabling Competencies
To view more information on the details of the enabling competencies within the consolidated summary, follow these steps.

1. View Enabling. The list of enabling competencies appears.

   ![Enabling Competencies Table]

2. For a detailed view, select an enabling competency. The detailed view appears and provides a summary of the student/candidate's responses, self-assessed proficiency, profession assessed proficiency, duration and status.
6 CPA Mentor Reviews

The Mentor Reviews section provides a quick status of the mentor review meetings that have occurred or are scheduled. It also includes comments submitted by the CPA Mentor.
7 Profession Assessments

The *Profession Assessments* section displays any reviews requested by the student/candidate. Information displayed in this section is typically entered by a provincial/regional CPA reviewer who documented their comments following a profession assessment of the submitted experience report.

When students/candidates believe they have completed all of the practical experience requirements or they are departing your pre-approved program, the following steps must be completed:

a) The future CPA must request a professional assessment in PERT. The *Assessment Status* will be *Certification Requested*. An automated email is sent to the program leader when a pre-approved program student/candidate requests a profession assessment.

b) The Pre-approved Program Leader must sign off on the assessment by making a declaration in PERT. Once the Pre-approved Program Leader has completed their required declaration, the status will change from Certification requested to *Assessment Requested*, and a CPA reviewer will be assigned to the assessment.

**Tiered Profession Assessment: Data Check**

If you, as a Program Manager, would like to be notified by email when a student/candidate requests a profession assessment, please contact your provincial/regional body and they can enable the assessment notification for your Pre-approved Program. Every time a student/candidate requests a profession assessment you would be copied on a system generated email to the Program Leader.

If you would like to review a profession assessment before it is submitted to your Program Leader, please contact your provincial/regional body and they can enable the “Data Check” status for your program.
The status of Data Check means that a profession assessment is with the program manager for Review prior to the experience profile being submitting to the Program Leader. As a program Manager, you can either approve the profession assessment which will then send it to the Program Leader or you can Return the assessment to the student/candidate should changes be needed. The Data Check feature and/or the email notification can be turned on or off at any time by contacting your provincial/regional body.

**Completing the Data Check**

When a student/candidate requests a profession assessment and your program has enabled Data Check, you would be notified via email that there is a profession assessment for you to review. Log on to your Program Manager portal and you will see the student’s/candidate’s profession assessment under the Data Check List section on the left navigation panel.

Select the Student/Candidate Name to view their experience reports and PERT details. It is recommended that you review the following details:

1. Experience report start and end dates are accurate and do not overlap
2. Total days of reported leave is accurate
3. Sufficient mentor reviews have been documented in the PERT and all mentor review are in a “completed” status
4. All relevant experience reports are in “verified” status
5. Self-assessed proficiency levels for the technical sub-competencies are appropriate
   a. If self-assessed proficiency levels exceed target proficiency levels, supporting documentation should be included (e.g. mentor comments support exceptional competency development)
6. If required, a signed chargeable hours form is attached to the final experience report
7. If the Profession Assessment is for Completion, the consolidated summary indicates that all requirements have been met.

Once your review is completed, select the profession assessment screen to complete the Data Check process. Click **Status Date**.

Click **Edit** to complete the process.

To approve and send the profession assessment to the Program Leader, click **Approve** and then **Save**. Comments are optional. Note: Your comments are visible to all portal users.
Once you select **Save** the student/candidate will no longer appear in your Data Check section.

To return the profession assessment to the student/candidate in situations where changes are needed, select **Return**, enter in your comments identifying the reasons it is being returned, and select Save. By selecting **Return**, the student's/candidate's profession assessment will be cancelled and they will receive an email that includes your comments.

**Note:** Your comments are visible to all portal users.
8 PERT Reports

To access the reports available to you, as Program Manager, click Reports, located on the left-hand navigation.

As Program Manager, you have access to the following reports:
- Student Roster Report
- Non-Compliance Report
- O/S Certification Requested Report
To access any one of these reports, click **Export**.

Each report will open as “Excel” format so you can easily save, search, manipulate, and combine data as needed. Each report provides specific data on the students/candidates currently associated within your pre-approved program.

**Note:** Some data within these reports are protected for confidentiality reasons. Information populated within these reports is exported directly from PERT and the student/candidate's profile.

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**Student Roster Report**

This report provides a full list of students/candidates enrolled in your pre-approved program along with their basic PERT information. This is to provide you, as a Program Manager, a high level overview of each student’s/candidate’s state/progress.

**CPA Number:** The student’s/candidate’s CPA ID

**Full Name:** The student’s/candidate’s first and last name

**Email Address:** The student’s/candidate’s email address they have identified in PERT

**Mentor:** Mentor’s first and last name associated/assigned to the student/candidate

**Note:** If there is no Mentor name assigned/associated with the student/candidate, the student/candidate has not yet added their mentor to their profile.

**PERT Status:** The student’s/candidate’s status in PERT. Status can be listed as the following:

- **In Progress:** Student/Candidate is in progress
- **Pending Enrollment:** Student/Candidate is still pending confirmation of being enrolled as part of your Pre-approved program
  * *Please review Chapter 3 Student/Candidate Details, in the User Guide (User Guide: also located on the left-hand side of your landing page)*
- **Unemployed:** Student/Candidate has identified themselves as being “unemployed”
- **PERT Standard Met:** Student/Candidate has met the Practical Experience Requirements for designation
**Position Type**: The student’s/candidate’s current type of employment position identified in the most recently created experience report.

**PER Effective Date**: The date that practical experience will begin to accumulate towards a student’s/candidate’s total practical experience duration. Relevant experience accumulated from this date forward is captured as “Current Experience.” Relevant experience accumulated before this date, is captured as “Prior” experience.

**Governing Body**: The student’s/candidate’s province that they are affiliated with for membership.

**Last Completed Mentor Review**: The date on which the student’s/candidate’s last completed mentor review was requested.

*Note*: If the field does not hold a date, a mentor review has not been requested or a review has been cancelled.

**Total Completed Mentor Reviews**: Total count of mentor reviews completed and documented in PERT by the student’s/candidate’s mentor.

**Program**: The name of the program which the student/candidate has identified themselves as part of within your Pre-Approved program.

**Location (Program)**: The location of the associated program identified.

**Program Status (Program)**: The status of the associated program identified.

**Non-Compliance Report**

This report will provide a list of students/candidates currently enrolled in your pre-approved program that may be potentially not in compliance with their reporting.

Students/Candidates whose PER Effective Date is within the last 7 months are excluded from this report. This report will only show students/candidates who meet one or more of the following criteria:

- “Last Completed Mentor Review” is dated more than 6 months ago from the date the report is exported.
- “Next Mentor Review Date” is dated prior to the date the report is exported (past dated).
- “End Date” of the most recent experience report listed is dated more than 6 months ago from the date the report is exported.

**CPA Number**: The student’s/candidate’s CPA ID.
Full Name: The student’s/candidate’s first and last name

Email Address: The student’s/candidate’s email address identified in PERT

Governing Body: The student’s/candidate’s province that they are affiliated with for membership

PER Effective Date: The date that practical experience will begin to accumulate towards a student’s/candidate’s total practical experience duration. Relevant experience accumulated from this date forward is captured as “Current Experience.” Relevant experience accumulated before this date is captured as “Prior” experience.

Position Type: The student’s/candidate’s type of employment position identified in their most recently created experience report.

Mentor: Mentor’s first and last name assigned to the student/candidates

Total Number of Mentor Reviews Completed: Total mentor reviews completed and documented in PERT by mentor

Last Completed Mentor Review: The date on which the student/candidates last completed mentor review was requested.

Note: This field will only show results of reviews that are in completed status. If the field does not hold a date, a mentor review has not been requested or a review has been cancelled

Last Mentor Review dated more than 6 months ago: If the student/candidates last mentor review date was more than 6 months ago, a “YES” will be displayed. If the student/candidates last mentor review date is less than 6 months ago a “NO” will be displayed.

Note: If this field shows a result of YES, but no date for “Last Completed Review” is shown, a mentor review has not been requested or a review has been cancelled. Please look into the students profile/reports further.

Mentor Review in Requested Status: If the student/candidate has a mentor review in requested status, a “YES” is displayed, otherwise “No” will be indicated.

Date of Requested Mentor Review: If a “YES” was indicated for Mentor Review in Requested Status, then the date the student/candidate made the request will be indicated here. If this date is more than 30 days ago, please follow up with the CPA Mentor.
Next Mentor Review Date: Due date of the student’s/candidate’s next mentor review with mentor

**Note:** This date is initially automatically populated to be 6 months from the PER Effective date. Subsequent to this, the Mentor is required to update this field when completing each mentor review.

Next Mentor Review Date over due: If the student/candidate’s next mentor review date is in the past, then a “YES” will be indicated.

End of most recent experience report: The most recent end date of the student’s/candidate’s experience report(s).

**Note:** If end date is blank then likely there is no end date indicated in the report or the student/candidate has no reports in their profile.

Last experience report greater than 6 months ago: If the student’s/candidate’s most recent end date of their experience report is dated more than 6 months ago a “YES” will be displayed. If the student’s/candidate’s last experience report is dated less than 6 months ago a “NO” will be displayed.

Report Status: This refers to the status of the experience report that the end date is using. A report status can be listed as the following:

- **New:** Indicates that a student/candidate has created a report but has not completed updating it.
- **Verified:** Indicates a student/candidate has created the experience report, updated any technical and enabling competencies that apply for that reporting period, and has selected Submit on the report.
- **Follow-up:** Indicates that a student/candidate has altered a report in the Verified status but has not selected Submit on the report.
- **Reviewed:** Indicates that your CPA body has reviewed and assessed the experience report. Only CPA reviewers can set a report to this status.
- **Verification Requested:** A report has been submitted to the supervisor for verification. This is likely seen on secondment reports.

Program: The program which the student/candidate has identified themselves as part of within your Pre-Approved program

Location (Program): The location of the associated program identified
**O/S Certification Requested Report:**
This report will show a list of student/candidates that have requested a Profession Assessment for one of the Program Leaders in your program.

**CPA Number:** The student’s/candidate’s CPA ID

**Full Name:** The student’s/candidate’s first and last name

**Email Address:** The student’s/candidate’s email address identified in PERT

**Governing Body:** The student’s/candidate’s province that they are affiliated with for membership

**Assessment Reason:** The reason the student/candidate has requested the assessment. The reason for the assessment could be for any of the following:
- Completion Assessment
- Change of Job

**Assessment Status:** The current status of the requested assessment.
The assessment status can be listed as any of the following:
- Certification Requested
- Data Check

**Status Date:** The date the Assessment Status was requested

**Program Leader:** The full name of the Program Leader associated with student/candidate

**Program Leader Email:** The Program Leader’s email

**Program:** The program which the student/candidate has identified themselves as part of within your Pre-Approved program

**Location (Program):** The location of the associated program identified

**Student Currently in your Program:** A “YES” will be indicated if this student/candidate is currently in your program. If “NO” is indicated, one of your Program Leaders has received an assessment for a student/candidate who previously worked in your pre-approved program.
Appendix A: PERT Resources

- Program Leader User Guide
- Program Manager PERT log in
- Mentor User guide
- PPR - Getting Started in PERT
Appendix B: PERT Process to Confirm Employment of CPA Students

1. CPA students/candidates must specify their employment details for your pre-approved program by updating their PERT profile with specific organization, location, and program information, as well as their CPA Mentor’s email address. Pre-approved program students/candidates are instructed to immediately create a Current Experience report in order for their job start date and type of employment (permanent, contract, co-op, intern) to be appropriately captured.

2. As a Program Manager, you will receive a PERT generated email after CPA students/candidates indicate employment in your pre-approved program, requiring you to log into PERT and verify the employment details of your CPA students/candidates.

3. **You need to confirm** whether the employment details of CPA students/candidates are accurate. Details to be confirmed are:
   a) **correct start date and employment type**
   b) **correct program name and location**
   c) **assignment of CPA mentor to pre-approved program student**

An extract of the new landing page for Program Managers, which is a roster of all CPA students who indicated employment in your organization’s pre-approved program, is as follows:
Note: — Program Managers can select Show Pending Only to identify which students/candidates require employment confirmation.

4. Program Managers may encounter three options —Yes, No, or Follow-up
   — Yes: If program details and start date are correct, then select Yes and click Submit to confirm a student/candidate’s employment in your pre-approved program. The PER Status will then change to in-progress.
   — No: If the CPA student/candidate is not in your pre-approved program, select No, enter comments, click Yes and click Submit. By Selecting No, the CPA student/candidate is removed from your roster, set to Unemployed and receives an email that includes your comments.
   — Follow up: If there is no start date or no CPA Mentor indicated, select Follow up, enter your comments, click Yes, and click Submit. This action will generate an auto email notification to CPA student/candidate that includes your comments about what action/changes are needed in order to confirm employment. You can also select Follow up if the program details are incorrect.

5. A requirement of Pre-approved programs is to assign CPA students/candidates with CPA mentors. A CPA Mentor is required in order to confirm employment.
Appendix C: CPA Practical Experience Requirements (PER) Effective Date

FREQUENTLY ASKED QUESTIONS

What is the PER Effective Date?
The Practical Experience Requirements (PER) Effective date is the date that practical experience will begin to accumulate towards your total practical experience duration.

Why is the PER Effective Date significant to CPA students/candidates?
Any experience accumulated after the PER Effective date is considered CURRENT experience and is reported through current experience reports. Any experience accumulated prior to the PER effective date is considered prior experience and is reported in either a prior pre-approved program (Prior PPR) or a prior experience verification (Prior EV) experience report within PERT. All CPA students/candidates are eligible to claim up to 12 months of prior experience that they have accumulated in the last 5.5 years that they have accumulated prior PER effective date.

How is the PER Effective Date calculated?
The PER Effective Date is calculated based on the later of your job start date or your CPA registration date (if within the last 90 days), and whether there you identified your CPA mentor in your PERT profile at the time your employment was confirmed. You may have your PER Effective Date calculated up to 90 days prior based on whether your job start date or CPA registration date occurred within the last 90 days, and if and only if you identified your CPA mentor in your PERT profile at the time your employment is confirmed. This is why it is important that you identify your CPA mentor as early as possible and before employment is confirmed.
How is employment confirmed?
If you are in the Experience Verification route (EVR), employment is confirmed via PERT when your provincial/regional body reviews and approves the role submitted via a pre-assessment. If you are in a pre-approved program route (PPR), employment is confirmed when your Program Manager confirms your employment in PERT.

If I am a PPR student/candidate, how does my Program Manager know when to confirm employment?
When you update your PERT profile to indicate employment at a specific organization, location, and program, an automatic notification requesting confirmation of your employment is sent to your program manager. It is imperative that you create an experience report once you start employment in order to capture your job start date, otherwise employment cannot be confirmed. Additionally, you will need to identify your CPA mentor in your PERT profile as this is required for your program manager to confirm employment.

Once the PER Effective date is set, does it change?
No, once set, the PER Effective Date will remain in your PERT profile until you qualify for CPA membership or deregisters.

For assistance, please send inquiries to your respective provincial/regional body.