

# CPA Mentor Match Portal

## FAQs for CPA Mentors & Students/Candidates

### What is the CPA Mentor Match Portal?

The *CPA Mentor Match Portal* is an online interactive system designed to assist students/candidates in the Experience Verification Route (EVR) to find a CPA mentor.

### How will the Portal benefit CPA mentors and students/candidates?

The Portal was created to better facilitate successful mentoring relationships between CPA mentors and students/candidates. If you have been waiting to be matched, this is a great way to speed up the process. It is also beneficial that CPA mentors can share information about themselves in the Bio section of their profile to assist students/candidates with choosing their desired CPA mentor based on familiar interests or connections.

### Who will have access to the Portal?

CPA students/candidates in the EVR who have not found a CPA mentor three months after the creation of their practical experience reporting tool (PERT) profile, will automatically gain access to the *CPA Mentor Match Portal* to assist with their search.

Rather than the CPA profession matching students/candidates with CPA mentors, the Portal allows students/candidates to conduct their own CPA mentor search by using specific search criteria.

Only EVR students/candidates, will be able to access the Portal through their Profile section of the PERT. Students/candidates working in a pre-approved program route (PPR) and CPA Mentors will not be able to access the Portal.

### Which CPA mentors will be in the Portal?

CPA mentors who selected the match options, “***any suitable match***” or “***only students who work within my organization***” in their CPA mentor profile, will be included in the Portal search pool.

CPA mentors who have selected the match option, “***only students who approach me. I do not want to be included in the CPA Mentor Match Portal***” will be excluded from the Portal search pool. The CPA provincial/regional body may contact CPA mentors in this category to offer **optional** match suggestions with students/candidates if a strong match is found.

## How can a student/candidate get matched with a CPA mentor who works within their organization?

Students/candidates must first perform a mentor search within the Portal. Search results that contain a “Yes” in the “Within Mentor’s Org Only” column identifies the CPA mentors who indicated that they only wish to work with mentees within their organization. To view the name of the CPA mentor’s organization, students/candidates must click “Mentor Bio” for that mentor. Before a request will be sent to that CPA mentor, the student/candidate must make a declaration that they work at the same organization as the CPA mentor.

## Is there a limit to the number of requests a student/candidate can send to CPA mentors?

Yes. Students/candidates are restricted to send one request to a CPA mentor at a time so that CPA mentors do not receive several requests at once. The CPA mentors are given five business days to respond to a student/candidate’s request.

## How are CPA mentor requests sent?

When students/candidates click “*send request*” next to a CPA mentor’s name in the Portal, the CPA mentor will receive an email asking them to accept or deny the request.

## What happens when a CPA mentor request is pending?

If a CPA mentor request is pending (and that CPA mentor has indicated a mentee maximum of number of one), their name will be greyed out to restrict other students/candidates from sending additional requests during the five business day period.

If a CPA mentor request is pending, (and that CPA mentor has indicated a mentee maximum of 2+), their name will continue to appear in the Portal for other students/candidates to send them additional requests during the 5 business day period.

## What happens when a CPA mentor accepts a request?

When a CPA mentor accepts a request from a student/candidate within five business days, the CPA mentor’s name will auto-populate into the student/candidate’s PERT profile. Students/candidates will receive a confirmation email that the match has been accepted and they will be prompted to contact their new CPA mentor within five business days. If the CPA mentor has not reached their maximum number of mentees Portal they can still be matched with other students/candidates.

## What happens when a CPA mentor denies a request?

When a CPA mentor denies a request from a student/candidate within five business days, the student/candidate will receive a confirmation email that the match has been denied, and they will be prompted to conduct another search in the Portal.

## What happens if a CPA mentor request goes unanswered after five business days?

If a CPA mentor does not respond to a request after five business days, the request will no longer be valid and the student/candidate will be prompted to do another search for a different CPA mentor.

## What should CPA mentors do to be excluded from the Portal?

Simply log into PERT, click “*Profile*” then “*Edit*” and ensure that within the “*I want to mentor...*” section, you have selected “*only students who approach me. I do not want to be included in the CPA Mentor Match Portal*”. You will be excluded from the Portal. Changes will only be updated after you click **Save**.

## What should CPA mentors do to be included in the Portal?

To be included in the Portal, CPA mentors can simply log into PERT, click on “*Profile*” and “*Edit*” and complete the steps below:

1. ***Check match Option:*** Within the “*I want to Mentor...*” section, select “***any suitable match***” or “***only students who work within my organization.***”
2. ***\*New - Add BIO:*** Share your personal hobbies, professional experience, and key enabling skills with potential mentees within the 5000 character limit. CPA mentors should include their **city** and **company name** in the Bio section.
3. ***\*New - Add Level of Experience:*** Select the most appropriate job title that matches your level of experience
4. ***\*New - Add Years of Experience:*** Select the most appropriate range that matches your years of experience
5. Click “**Save**” to complete the update of your PERT profile.

Click [here](#) for additional information about the mentorship program and how to find a CPA mentor.

If you have additional questions, please contact your [provincial/regional CPA body](#).

