

# Changing Jobs while reporting

Future CPAs may change their job while completing the practical experience requirements. Use this guide to identify whether you need to report your change of job and how to do it.

Report a change of job in the following situations:

- you are terminating employment with your current employer,
- you are changing roles at your current employer (i.e. Financial Analyst to Internal Auditor),
- you are changing office locations within a pre-approved program, or
- your co-op is ending, and you have not been asked to stay on the roster.

You are required to report your change of job within 90 days of your employment change date. This is to ensure your experience can be reviewed properly and your new role assessed for qualifying experience.

Do not report a change of job if:

- you are promoted within your role at the same employer (i.e. Analyst to Senior Analyst), or
- you are in a co-op, going back to school and your program leader has instructed you to stay on their roster as you will be returning to the same pre-approved program.

This document covers step-by-step instructions on how to report your change of job in PERT, select your situation to view your instructions:

[I am currently unemployed and starting a new job in the EVR](#)

[I am currently unemployed and starting a new job in the PPR](#)

[I am currently in the EVR and am starting a new job in the EVR](#)

[I am currently in the EVR and am starting a new job in the PPR](#)

[I am currently in the EVR and have not started a new job](#)

[I am currently in the PPR and am starting a new job in the EVR](#)

[I am currently in the PPR and am starting a new job in the PPR](#)

[I am currently in the PPR and have not started a new job](#)

## Currently unemployed and starting a new job in the EVR

The first thing all future CPAs must do once they have a relevant role (or one they believe is relevant) is have that role approved for reporting experience.

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION, update your experience route to Experience Verification and add your mentor.

*(Note: Future CPAs reporting in EVR (and not public practice) can be mentored by [CPA members in good standing](#). If you are reporting in EVR and public practice your mentor must be working in public practice also.)*

2. Return to the Home page and click GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT, document your employment information, and attach your current job description along with any other required documentation.
3. Return to the Report Details section of your experience report and click COMPLETE.
4. Return to the Home page and click GET STARTED on the action item SUBMIT YOUR EMPLOYMENT INFORMATION and request your pre-assessment.

Once you have requested your pre-assessment, it will be sent to your provincial/regional body. Once the pre-assessment is reviewed, you will receive an email with the results.

5. Return to your Home page and confirm you have no more action items.

## Currently unemployed and starting a new job in the PPR

The first thing all future CPAs must do once they know they are employed in a pre-approved program is update their employment information.

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your experience route to Pre-approved Program, enter your new organization information and add your mentor.

*(Note: Future CPAs reporting in PPR must be mentored by an approved mentor who also works within the same organization. Your program manager will provide you with an eligible mentor. You must update your mentor information before you can report experience from the PPR.)*

2. Return to the Home page and click GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT. Document your employment information and click COMPLETE.

Your new employment information will now be sent to your program manager who will confirm your employment. You will then receive an email letting you know you are able to begin reporting.

3. Return to your Home page and confirm you have no more action items.

## Currently in EVR and starting a new job in the EVR

If you had a role under EVR and have changed jobs but will still be reporting under EVR, you need to have your previous employment work experience reviewed and your new role assessed to confirm it is still a relevant and qualifying role.

1. From your Experience Reports page, update your previous employment's experience report(s) and self-assess your sub-competency proficiencies to reflect your experience gained during your employment for your previous role.
2. Ensure your report(s) is in a verified status.
3. From your Mentor Meetings page, ensure your mentor meetings have been documented.
4. When your experience report(s) are in a verified status and your mentor meeting is complete, navigate to the CPA Reviews page and click REQUEST CPA REVIEW.

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### CPA REVIEWS

To have your competencies recognized toward meeting the Practical Experience Requirements, your experience reports must be reviewed by the CPA profession. Only verified experience reports can be reviewed.

Select Request CPA Review if your experience reports:

- accurately reflect experience gained to date
- have required documents attached
- have been verified.

REQUESTED	COMPLETED	STATUS	
2019-05-27	2019-06-27	Completed	<a href="#">VIEW</a>
2017-06-03		Cancelled	<a href="#">VIEW</a>

[REQUEST CPA REVIEW](#)

5. Enter CHANGE OF JOB ASSESSMENT as the Review Reason.

6. Complete the declarations and click REQUEST.

### REQUEST CPA REVIEW

<b>Type</b>	Assessment
<b>Status</b>	Assessment Requested
<b>Date Created</b>	2020-07-30

Select the reason you are requesting a CPA Review:

**Review Reason** (Required) Change of Job Assessment ▼

### DECLARATION

- I have reviewed the definitions/requirements for the technical competencies that I have populated in my experience report(s) and addressed them in my responses.
- If employed in public practice, I have attached the chargeable hours form to support my competency development.
- My experience report(s) for assessment accurately reflect my experience and are in "verified" status.
- I acknowledge that my required semi-annual mentor reviews are documented in the PERT and are in "completed" status. If not, a duration penalty will be assessed for each undocumented mentor review.

BACK
REQUEST

This will send your report(s) to your provincial/regional CPA body for review. You will be notified if additional information is required and once the review is complete.

Your experience route will be updated to "Unemployed" to enable you to update your experience route and document your new employment information.

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your reporting route to Experience Verification and add your mentor (if necessary).

*(Note: Future CPAs reporting in EVR (and not public practice) can be mentored by any mentor. Therefore, you can keep the same mentor even if they were employed with your previous company. They are still eligible to mentor you while you are working in your new role. If you are reporting in EVR and public practice your mentor must be working in public practice also.)*

2. Return to the Home page and click GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT. Document your employment information, attach your new job description along with any other required documentation.
3. Return to the Report Details section of your experience report and click COMPLETE.

4. Return to the Home page and click GET STARTED on the action item SUBMIT YOUR EMPLOYMENT INFORMATION and request your pre-assessment

Once you have requested your pre-assessment, it will be sent to your provincial/regional body. Once the pre-assessment is reviewed, you will receive an email with the results.

5. Return to your Home page and confirm you have no more action items.

## Currently in the EVR and starting a new job in the PPR

If you had a role under EVR and have changed jobs to now report under PPR, you need to have your previous employment work experience reviewed and your new role documented.

1. From your Experience Reports page, update your previous employment's experience report(s) and self-assess your sub-competency proficiencies to reflect your experience gained during your employment for your previous role.
2. Ensure your report(s) is in a verified status.
3. From your Mentor Meetings page, ensure your mentor meetings have been documented.
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[REQUEST CPA REVIEW](#)

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### REQUEST CPA REVIEW

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<b>Date Created</b>	2020-07-30

Select the reason you are requesting a CPA Review:

**Review Reason** (Required) Change of Job Assessment ▼

### DECLARATION

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- If employed in public practice, I have attached the chargeable hours form to support my competency development.
- My experience report(s) for assessment accurately reflect my experience and are in "verified" status.
- I acknowledge that my required semi-annual mentor reviews are documented in the PERT and are in "completed" status. If not, a duration penalty will be assessed for each undocumented mentor review.

BACK
REQUEST

This will send your reports to your provincial/regional CPA body for review. You will be notified if additional information is required and once the review is complete.

Your experience route will be updated to "Unemployed" to enable you to update your experience route and document your new employment information.

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your experience route to pre-approved program. Enter your new PPR information and new mentor's email.

*(Note: Future CPAs reporting in PPR must be mentored by an approved mentor who also works within the same organization. Your program manager will provide you with an eligible mentor. You must update your mentor information before you can report experience from the PPR.)*

2. Return to the Home page and click GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT. Document your employment information and click COMPLETE.

Your new employment information will now be sent to your program manager who will confirm your employment. You will then receive an email letting you know you are able to begin reporting.

3. Return to your Home page and confirm you have no more action items.



## Currently in the EVR and have not started a new job

If you had a role under the EVR and have not started a new job, you need to have your previous employment work experience reviewed, and have your reporting status updated to “Unemployed”.

1. From your Experience Reports page, update your previous employment’s experience report(s) and self-assess your sub-competency proficiencies to reflect your experience gained during your employment for your previous role.
2. Ensure your report(s) is in a verified status.
3. From your Mentor Meetings page, ensure your mentor meetings have been documented.
4. When your experience report(s) are in a verified status and your mentor meeting is complete, navigate to the CPA Reviews page and click REQUEST CPA REVIEW.

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Review Reason (Required)

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[BACK](#) [REQUEST](#)

This will send your reports to your provincial/regional CPA body for review. You will be notified if additional information is required and once the review is complete.

Your experience route will be updated to "Unemployed" meaning you are not required to report any experience and/or mentor meetings, but ensure you update your employment information as soon as you have a new role.

*(Note: Although you are not required to report any mentor meetings, you can keep your mentor on your profile while you are unemployed. We encourage you to meet with your mentor informally.)*

## Currently in the PPR and starting a new job in the EVR

If you had a role under the PPR and have changed jobs to now report under EVR, you need to have your previous employment work experience reviewed and your new role assessed to confirm it is still a relevant and qualifying role.

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If you have chargeable hours to report, ensure your signed form is attached.

2. Ensure your report(s) is in a verified status.
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This will send your reports to your program leader (or program manager in some cases) for sign off. You will be notified once your reports have been signed off and are with your provincial/regional CPA body for review. You will be notified if additional information is required and when the review is complete.

Your experience route will be updated to "Unemployed" to enable you to update your experience route and document your new employment information.

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION, update your experience route to Experience Verification and add your mentor (if necessary).

*(Note: Future CPAs reporting in EVR (and not public practice) can be mentored by any mentor. Therefore, you can keep the same mentor even if they were employed with your old PPR (if they are willing). They are still eligible to mentor you while you are working in your new role. If you are reporting in EVR and public practice your mentor must be working in public practice also.)*

2. Return to the Home page and click GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT. Document your employment information and, attach your new job description along with any other required documentation.

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5. Return to your Home page and confirm you have no more action items.

## Currently in the PPR and starting a new job in the PPR

If you had a role under the pre-approved program route and have changed jobs, reporting under a new PPR, you need to have your previous employment work experience reviewed and reporting status reset to enable you to update your experience route to the new PPR.

1. From your Experience Reports page, update your previous employment's experience report(s) and self-assess your sub-competency proficiencies to reflect your experience gained during your employment for your previous role.

If you have chargeable hours to report, ensure your signed form is attached

2. Ensure your report(s) is in a verified status.
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Your reporting route will be updated to "Unemployed", to enable you to update your experience route and document your new employment information

1. From your Home page, click GET STARTED on the action item UPDATE YOUR EMPLOYMENT INFORMATION and update your experience route to pre-approved program. Enter your new PPR information and new mentor's email.

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2. Return to the Home page and click GET STARTED on the Action Item DOCUMENT YOUR EMPLOYMENT INFORMATION, enter the required information, and click CREATE, then click COMPLETE.

Your new employment information will now be sent to your program manager who will confirm your employment. You will then receive an email letting you know you are able to begin reporting.

3. Return to your Home page and confirm you have no more action items.

## Currently in the PPR and have not started a new job

If you had a role under the pre-approved program route and have not started a new job, you need to have your previous employment work experience reviewed and your reporting status updated to “Unemployed”.

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