

PERT Guide for Supervisors

The supervisor is the person to whom a future CPA reports for the position indicated in their experience report.

A supervisor must not be related to the future CPA and must occupy a position at a higher hierarchy level.

Supervisor responsibilities

Supervisors verify the accuracy of the experience report details and work experience. They do not assess the proficiency levels.

If a supervisor is also a mentor, program manager and/or program leader, note that supervisor verification can only be done by clicking on the link sent via email. Verification must be completed within 30 days, as the link will expire.

How to complete supervisor verification

You will receive an email with a direct link to the experience report.

- Click on the link within the email (link expires in 30 days)

This will take you to the *Report Details* page.

- Confirm the following is correct:
 - Start and end dates
 - Position title
 - Average hours worked per week
 - Leave taken
 - » A leave taken is defined as time away from work for any reason, including vacation, sickness, professional development, or study time.
 - Employer address
 - Employer information
 - Supervisor information
- Select **Agree** if the details are correct (or **Disagree** if they are not).
- Enter your comments (if you selected Disagree, please indicate what changes are required).
- Click **Save**.

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

Guide for Supervisors | Français | English | Signed in as Fake Sup68554 | Close

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

Fake S50893 - Accountant - (2021-02-01 - 2022-05-31)

Report Details > Technical Competencies > Enabling Competencies > Notes > Attachments > Declaration

REPORT DETAILS

OVERVIEW	
Status : Verification Requested	Calculated Duration : 15.94 months
Status Change Date : 2023-03-28	Recognized Duration :
EMPLOYMENT INFORMATION	
Report Type : Current Experience	Experience Type : Experience Verification
Position Title : Accountant	Employer :
Position Type : Permanent	Start Date : 2021-02-01
Average Hours Worked Per Week : 40.00	End Date : 2022-05-31
Leave Taken (days) : 30	
EMPLOYER INFORMATION	
Primary Clients : External Corporate	Industry : Scientific and Technical Services
Total Number of Employees : 70	Number of CPAs Employed : 1 - 5
Number of Employees in your Department : 7	Number of Direct Reports you Manage : 0
EMPLOYER ADDRESS	
Street Address :	Country : Canada
City : VANCOUVER	Postal Code :
Province : British Columbia	
SUPERVISOR INFORMATION	
First Name : Fake	Position Title : Manager of Accounting
Last Name : Sup68554	Business Phone Number : 0000000000
Email :	Language Preference : English
Accounting Designation : No Professional Accounting Designation	
SUPERVISOR VERIFICATION	
Are the details on this page accurate? <input type="radio"/> Agree <input type="radio"/> Disagree	
Supervisor Comments :	<input type="text"/>
<input type="button" value="PRINT"/> <input type="button" value="CANCEL"/> <input type="button" value="SAVE"/>	

- Navigate to the *Technical Competencies* tab by clicking on the progress bar.

Here you can see a list of the technical competencies. If a sub-competency contains experience, you will see a “Verification Required” label.

- Click on the technical competency or the + to view the sub-competencies.

TECHNICAL COMPETENCIES			
<p>Below you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the sub-competencies that are relevant to your experience for this reporting period.</p> <p>To understand the CPA Practical Experience Requirements of Core, Breadth and Depth, review the Resource section in PERT or utilize the Consolidated Summary. It is not realistic or expected that you would demonstrate proficiency in all competency areas.</p>			
COMPETENCY AREA	YOUR SUB-COMPETENCIES		
Financial Reporting (FR) ?	4	Verification Required	+
Taxation (TX) ?	3	Verification Required	+
Strategy and Governance (SG) ?	0		+
Management Accounting (MA) ?	2	Verification Required	+

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

- Repeat this for any remaining technical competencies.

COMPETENCY AREA	YOUR SUB-COMPETENCIES		
Management Accounting (MA) ?	2 Verification Required		
Add Note			
Management reporting needs and systems (MA1) ?			
TARGET PROFICIENCY ?	CIRCUMSTANCE ?	COMPLEXITY ?	AUTONOMY ?
2	Non Routine	Moderate	Medium
5647j@mailinator.xyz			
Reviewer Notes			
<hr/>			
Planning, budgeting and forecasting (MA2) ?			
TARGET PROFICIENCY ?	CIRCUMSTANCE ?	COMPLEXITY ?	AUTONOMY ?
1	Routine	Moderate	Medium
5647j@mailinator.xyz			
Reviewer Notes			
<hr/>			
Cost / revenue / profitability management (MA3) ?			
TARGET PROFICIENCY ?	CIRCUMSTANCE ?	COMPLEXITY ?	AUTONOMY ?
Reviewer Notes			
<hr/>			
Organizational / individual performance measurement (MA4) ?			
TARGET PROFICIENCY ?	CIRCUMSTANCE ?	COMPLEXITY ?	AUTONOMY ?
Reviewer Notes			
<hr/>			
SUPERVISOR VERIFICATION			
Are the details on this page accurate?			
<input type="radio"/> Agree			
<input type="radio"/> Disagree			
Supervisor Comments:			
<input type="text"/>			
<input type="button" value="PRINT"/> <input type="button" value="CANCEL"/> <input type="button" value="SAVE"/>			

TECHNICAL COMPETENCIES			
Below you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the sub-competencies that are relevant to your experience for this reporting period.			
To understand the CPA Practical Experience Requirements of Core, Breadth and Depth, review the Resource section in PERT or utilize the Consolidated Summary.			
It is not realistic or expected that you would demonstrate proficiency in all competency areas.			
COMPETENCY AREA	YOUR SUB-COMPETENCIES		
Financial Reporting (FR) ?	4	Verified	+
Taxation (TX) ?	3	Verified	+
Strategy and Governance (SG) ?	0		+
Management Accounting (MA) ?	2	Disagree	+

- Navigate to the *Enabling Competencies* tab by clicking on the progress bar.

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

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

ENABLING COMPETENCIES

Enabling competencies reflect the key elements that comprise the personal attributes of a CPA.

There are five competency areas containing three-part questions. You are not expected to document all five enabling competencies semi-annually. Only choose the enabling competencies that most reflect your professional development obtained during this reporting period.

Provide tangible examples and clear explanations to demonstrate how you've developed proficiency in each of the enabling competencies.

Ensure you also demonstrate how you applied the CPA Way. To learn more about the CPA Way and how to apply these principles when formulating your responses to these questions, click [here](#).

For confidentiality reasons, do not include client, customer or organization names in your examples. Also note that the information in your Experience Reports is accessible to those involved in the review and verification process, including Program Leader/Manager, Supervisor, Mentor, CPA staff, etc.

Breaches of the CPA Professional Code of Ethics by a designated CPA member (colleague, employer, client, etc.) should be reported to your provincial body.

To expand on a competency area, click "+".

For further information use the (?) for additional guidance.

ENABLING COMPETENCY	ANSWERED
Question 1: Acting Ethically and Demonstrating Professional Values ?	+
Question 2: Solving Problems and Adding Value ?	+
Question 3: Communicating ?	+
Question 4: Managing Self ?	✓ +
Question 5: Collaborating and Leading ?	+

SUPERVISOR VERIFICATION

Are the details on this page accurate? Agree Disagree

Supervisor Comments:

PRINT CANCEL SAVE

- Confirm the examples provided are valid and properly represent their role.
- Repeat this for any remaining enabling competencies with answers.
- Select **Agree** if the details are correct (or **Disagree** if they are not).
- Enter your comments. (If you selected Disagree, please indicate what changes are required).
- Click **Save**.

- Navigate to *Notes* tab (no verification is required here, but you can review any notes if you wish).
- Navigate to *Attachments*.
 - No verification is required here, but you can review any attachments if you wish.
- Navigate to the *Declaration* tab.
- Complete the supervisor declarations:
 - “Having reflected on the candidate’s behaviour and performance, I am satisfied that I have responded accurately to each of the sections of this experience report.”
 - » Check this if you have responded accurately to each of the sections of the experience report.
 - “I declare I have an arm’s length relationship with the student. For this purpose, arm’s length is not a family member.”
 - » Leave this checked if you are not directly related.

✓ Report Details > ✓ Technical Competencies > ✓ Enabling Competencies > ✓ Notes > ✓ Attachments > Declaration

SUPERVISOR DECLARATION

Having reflected on the candidate’s behaviour and performance, I am satisfied that I have responded accurately to each of the sections of this experience report.

I declare I have an arm’s length relationship with the student. For this purpose, arm’s length is not a family member. ⓘ

CANCEL SAVE

Once you have completed your verification, you will get a confirmation screen.

If you have selected Disagree at any time, an email will be sent to the future CPA notifying them. They will be able to see your comments, make the changes and submit the experience report for re-verification.

Additional Information

- You only need to verify the description of duties and experiences. A CPA reviewer will evaluate the proficiency levels.
- You must complete the declaration every time, even if you have disagreed to an area in the report.
- If you disagreed with anything in the report, please explain your objections in the “Supervisor Comments” field. The future CPA will be required to make the changes and submit the experience report for re-verification.
- If your email address is a non-corporate email address, additional information will be required. The future CPA will be asked to provide this, or you may be contacted directly by the provincial/regional body to confirm the email address is valid.
- If the link has expired, please contact the future CPA. They will need to re-submit the experience report for verification.