CPA CHARTERED PROFESSIONAL ACCOUNTANTS

Quick Reference Guide for PERT Tasks

Students/Candidates

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Create an initial experience report

(for PPR Students/Candidates)

1. Log in to PERT
2. Click **Create New Report**
3. Enter in the required information

   Note:
   — *the Start Date refers to the student/candidate's employment start date*
   — *the End Date should not go past the date the report is submitted for verification*

4. Click **Create** to save the report (PER Status = Pending Enrolment)

Next steps:

1. Confirmation of employment in a pre-approved program is required before students/candidates are able to commence reporting their experience. The Program Manager will receive notification to complete this action. You must indicate a CPA Mentor on your PERT profile in order for your program manager to confirm your employment. Once confirmation is completed, students/candidates will receive an email notification and the PER Status will change from "Pending Enrolment" to "In Progress".
2. Once the PER status indicates "In Progress" then students/candidates proceed to report their practical experience. The initial experience report may be revised, updated or edited for this purpose. Students/candidates may need to create both a prior and a current report if the PER Effective date is different than their job start date.
3. Semi-annually, students/candidates submit a Mentor Review request and meet with their mentor. Further information on mentor reviews can be found within this document under ***Submit a Mentor Review Request***.

Create a pre-assessment

(for EVR Students/Candidates)

Note: *A pre-assessment report is the first experience report EVR students/candidates submit. It is NOT a report where duration (time) or competencies are granted. Its primary purpose is to validate whether student/candidates are in a relevant role that meets CPA's entrance requirement of achieving at least 1 technical sub-competency to a Level 1 proficiency.*

1. Log in to PERT
2. Click **Create New Report**
3. Enter in the required information

   Note:
   — The *Start Date* is the date you started in the position you are submitting for pre-assessment.
   — The *End date* can be left blank unless the specific end date is known.
   — DO NOT complete the *Technical and Enabling Competencies* sections

4. Click **Create**
5. Open the report. In the *Attachments* tab, upload the following documents:
   a. Comprehensive resumé
   b. Job description, on Company letterhead
   c. Organizational chart, on Company letterhead
6. Close the report
7. Click on the *Profession Assessments* section
8. Click **Request Pre-Assessment**

9. Answer the *Candidate Declaration* by clicking on the box
10. Click **Create**

Next steps:

1. Confirmation of employment in a relevant role in the experience verification route is required before students/candidates are able to commence experience reporting. Once the pre-assessment is completed, students/candidates will receive an email notification and the PER Status will change from "Pre-assessment required" to "In Progress". Students/candidates must have a CPA mentor on their PERT profile in order for the PER Effective date to be set.
2. Once PER status indicates "In Progress" then students/candidates proceed to report their practical experience. The initial experience report will be set to *Reviewed* status and cannot be edited. Students/candidates must create a current experience to record their work experience. Some students/candidates may need to create both a prior and a current report if the PER Effective date is different than their job start date.
3. Semi-annually, students/candidates submit a Mentor Review request and meet with their mentor. Further information on mentor reviews can be found within this document under ***Submit a Mentor Review Request***

Cancel a pre-assessment request

(for EVR Students/Candidates) Warning: this action cannot be undone

1. Log in to PERT
2. Click the *Profession Assessments* tab
3. Click the assessment request status date to open the request
4. Click **Cancel**
5. Click **Yes** to confirm cancellation

Create a new experience report

(for EVR Students/Candidates upon completion of pre-assessment; or for PPR Students/Candidates submitting experience other than what was included in their first experience report)

1. Log in to PERT
2. Click on 'Create New Report'
3. Select the report type based on PER Effective date and what is being reported:
   a. Current Experience — experience from your PER Effective date onwards
   b. Prior EV — experience verification experience that is before your PER Effective date
   c. PRIOR PPR — pre-approved program experience that is before your PER Effective date
   d. Catch up — legacy experience that has been previously reported and approved by legacy organization
4. Key in the required information

   Note:
   — the *Start Date* refers to the student's/candidate's employment start date
   — the *End Date* should not go past the date the report is submitted for verification
5. Click the "Create" button to save the report

Fill out/Complete an experience report

1. Select the experience report to be edited by clicking on employer name or position.
2. Select the "Technical Competencies" tab, click to open each of the competency areas (Financial Reporting, Audit & Assurance, Finance, etc.) and fill in the required information for the relevant competencies that have been developed

For PPR Students/Candidates:
The competency map is pre-loaded. PPR students/candidates only need to complete the 'Self Assessed Proficiency' column. For information on the appropriate level to select, click the blue Information button

For EVR Students/Candidates:
Enter the required information for the relevant sub-competency areas in Financial Reporting, Audit & Assurance, Finance, Taxation, Strategy & Governance, and Management Accounting that have been developed during the reporting period. EVR student/candidates only need to report position duties in the areas that they have developed during that period. Select the appropriate item for Target Proficiency (where you want to be at time of qualification), Circumstance, Complexity, Autonomy and Self Assessed Proficiency level (where you are today). For information on the appropriate proficiency level to select, click on the blue button

1. Click **Save** to save and close
2. For *Enabling Competencies*, click on the **Edit** link for each question and provide your answers in the text box. Students/candidates do not need to complete each enabling question for each reporting period; only the relevant competencies that have been developed during the reporting period should be completed. All enabling competencies must be at a Level 2 proficiency at time of qualification. Select the appropriate level of *Self-Assessed Proficiency* for that reporting period.
3. Click **Save** to close
4. Enter notes or comments in the *Notes* tab, as necessary
5. Attach any supporting documents, as needed

Note: *Only use plain text when filling out your reports (no special characters)*

Next step:

1. Submit the report for verification, by selecting **Submit** in *Report Details*. For further information on how to submit reports for verification, refer to the *Submit report for verification* section in this document.

Upload or attach a document to an experience report

1. Log in to PERT
2. Under *Position*, click to open the report
3. Select the *Attachments* tab
4. Click **Browse** box and find and select the document(s) to upload
5. Click **Upload**

Create a prior experience report — (same PRIOR PPR)

*(For PPR students/candidates reporting prior experience in the **same** pre-approved program as their current pre-approved program)*

1. Log in to PERT
2. Click **Create New Report**
3. Enter the required information. Select **Prior PPR** as the report type.

   Note:
   — the *Start Date* refers to the student/candidate's employment start date
   — the *End Date* should not go past the PER effective date

4. Click **Create** to save the report
5. The competency map is pre-loaded. You only need to complete the *Self Assessed Proficiency* column. For information on the appropriate level to select, you may click on the blue button for information.
6. Review the details for accuracy; revise the report as necessary
7. Click **Submit** on the *Report* Details tab. This action will automatically switch the report status to 'Verified' and a confirmation email is sent to the student/candidate.
8. Please note that students/candidates working in a pre-approved program should only submit a profession assessment upon qualification or when they have left the program (whichever occurs first). The experience report can be left in a 'Verified' status until such time.

Create a prior experience report — (different PRIOR PPR)

*(For PPR students/candidates reporting prior experience with a **different** pre-approved program than their current pre-approved program)*

1. Repeat steps 1-8 for *Creating a prior experience report – same PRIOR PPR*
2. Click the *Profession Assessments* tab
3. Click **Request Assessment**
4. Select the applicable Assessment Reason. For further information on Assessment reasons, refer to the *submit a profession assessment request* section in this document.
5. Select the PRIOR PPR report that is from a different pre-approved program than the current program
6. Select the *Program Leader* for the previous pre-approved program
7. Check the *Candidate & Pre-Approved Program Declaration* boxes
8. Click **Create**

Next steps:

1. For PPR students/candidates, the assessment first goes to the Program Leader to verify. Once the Program Leader has completed their part of the assessment, it will be assigned to a CPA Reviewer.
2. When assessment has been processed, students/candidates will receive notification by email on their status.

Create a prior experience report (PRIOR EV)

(for PPR students/candidates reporting prior experience that was obtained through the experience verification route; for EVR students/candidates reporting prior experience)

1. Log in to PERT
2. Click **Create New Report**
3. Enter in the required information. Select **Prior EV** as the report type

   Note:
   — the *Start Date* refers to the student/candidate's employment start date
   — the *End Date* should not go past the PER effective date

4. Click **Create** to save the report
5. Fill out the relevant *Technical* and *Enabling Competency* areas developed during that period. For information on the appropriate level to select, you may click on the blue Information button.
6. Review the details for accuracy; revise the report as necessary.
7. Click **Submit** on the *Report Details* tab to submit the report for verification. This action will automatically switch the report status to 'Verification Requested' and the former supervisor will receive an email notification.
8. Once the supervisor has completed the online verification and submitted the experience report, the status of the report will change to 'Verified'.

   Note: *supervisor email should be a corporate email address to avoid a report status of Admin Assess.*

9. Click the *Profession Assessments* tab
10. Click **Request Assessment**
11. Select the applicable Assessment Reason. For further information on Assessment reasons, refer to the *submit a profession assessment request* section in this document.
12. Click **Create**.

Next steps:

1. When assessment has been processed, the student/candidate will receive notification by email on the status.

Revise/Update an existing report that has not yet been submitted for verification

(report status is still 'New' status)

1. Log in to PERT
2. Under *Position* click the report to be revised/updated
3. Edit the revisions
4. Click **Save**
5. When ready to submit the report, click **Submit** in the report details tab to submit for verification.

Next step:

1. Submit the report for verification.

Submit a report for verification — PPR

(for PPR Students/Candidates)

1. Log in to PERT
2. Review the details for accuracy; revise the report as necessary
3. Click **Submit** on the *Report Details* tab to set the report to a "Verified" status. This action will automatically switch the report status to 'Verified' and a confirmation email is sent to the student/candidate.

Next steps:

1. Semi-annually, students/candidates need to update the end date of the experience report for the relevant period, and update any technical and enabling competencies developed.
2. Request a Mentor Review.
3. Meet with your mentor.
4. Ensure your mentor confirms the meeting has occurred and documents the details in PERT
5. Submit a *Profession Assessment* request:
   - when the consolidated summary reflects that all the requirements have been met or
   - when leaving a pre-approved program

Submit a report for verification — EVR

(for EVR Students/Candidates)

1. Log in to PERT
2. Review the details for accuracy; revise the report as necessary
3. Click **Submit** to submit the report for verification, then click **Yes** to the confirmation message; close the report to return to the main page
4. Refresh the page by clicking on the refresh button. The report's status will then switch to 'Verification Requested',

   A system-generated email will be sent to the Supervisor to verify the report and complete an online declaration (instructions are provided to the Supervisor in the email). When the Supervisor completes the verification and declaration, the report status will switch to "Verified." Student/Candidate will receive an email notification.

Next steps:

1. Semi-annually, update the end date of the experience report for the relevant period, and update any technical and enabling competencies developed.
2. Request a Mentor Review.
3. Meet with your mentor.
4. Ensure your mentor confirms the meeting has occurred and documents the details in PERT.
5. At 12 months, all EVR student/candidates must request a profession assessment. Subsequent to that, EVR student/candidates submit a profession assessment when:
   - the next assessment date is scheduled in PERT
   - they change employers
   - the consolidated summary reflects that all the requirements have been met

Cancel a request to verify a report

(for EVR Students/Candidates) Warning: this action cannot be undone

1. Log in toPERT
2. In the *Position* column, click to open the report showing a status of 'Verification Requested'
3. Select **Cancel Submission**
4. A confirmation box will appear. Click **Yes**

Important: *If you cancel a Verification Request at any time, you MUST contact the Supervisor directly and instruct that person to disregard the email verification request.*

Revise/Update a verified report — PPR

(for PPR Students/Candidates)

(Revise a report that is already in a Verified state)

1. Log in to PERT
2. Under *Position* click on the report to be revised
3. Select **Re-Open** on the report details tab.
4. Select **Edit** then enter the revisions/changes

   Note: *PPR Students/Candidates are not able to re-open a report once they have submitted a Profession Assessment.*
5. Click **Save**. The report's status will show as 'Follow-Up'.
6. To switch the report status back to 'Verified', open the file and click **Submit** on the report details tab.

Next steps:

1. Semi-annually, update the end date of the experience report for the relevant period, and update any technical and enabling competencies developed.
2. Request a Mentor Review.
3. Meet with your mentor.
4. Ensure your mentor confirms the meeting has occurred and documents the details in PERT

Revise/Update a verified report — EVR

(for EVR Students/Candidates) (Revise a report that is already in a Verified state)

1. Log in to PERT
2. Under *Position,* click on the report to be revised
3. Select **Re-Open**
4. Select **Edit** then enter the revisions/changes
5. Click on **Save** and close the report to return to the main page. Refresh the page by clicking on the refresh button. The report's status will then switch to 'Followup'
6. To re-submit the report, follow the steps in the ***Submit a Report*** section

7. The Supervisor will be required to verify the report and complete the declaration again to switch the report's status back to Verified.

Next steps:

1. Semi-annually, update the end date of the experience report for the relevant period, and update any technical and enabling competencies developed.
2. Request a Mentor Review.
3. Meet with your mentor.
4. Ensure your mentor confirms the meeting has occurred and documents the details in PERT.

Delete an experience report

*(**Note:** This is only possible if the report's status is either in New or Verified) Warning: this action cannot be undone.*

1. Log in to PERT
2. Under **Position** click on the report to be deleted
3. Select **Delete** and confirm the action by selecting **Yes**, then **OK.** Refresh the page by clicking on ↻. The deleted report will no longer be visible.

Switch from legacy reporting to CPA PERT

(for students/candidates who started reporting experience under a legacy path and want to switch to CPA PERT) Please contact your provincial body if you wish to switch from legacy reporting to CPA PERT. See below for contact details:

— CPA Alberta: practicalexperience@cpaalberta.ca

— CPA Atlantic Region: practicalexperience@cpaatlantic.ca

— CPA BC: cpabcper@bccpa.ca

— CPA Ontario: practicalexperience@cpaontario.ca

— CPA Manitoba: practicalexperience@cpamb.ca

— CPA Saskatchewan: practicalexperience@cpask.ca

Change experience path from EVR to PPR, or vice versa

***Note:** Changing reporting path is only possible if the student/candidate has no open report(s) i.e. (all reports are in Reviewed status).*

1. Log in to PERT
2. Click **Profile**
3. Click **Edit**
4. In the *Experience Path* field, click on the dropdown button and select the route
5. Provide additional information as required
6. Click **Save**

Enter/Change/Update mentor email information in PERT

1. Log in to PERT
2. Click **Profile**
3. Click **Edit**
4. Enter your mentor's email address.
5. Click **Save**

   Note:
   - If the system rejects the mentor information, your chosen mentor may not have registered to become a mentor yet, or has registered but did not complete the mentor registration process or has exceeded their maximum number of students/candidates under mentorship.
   - Ask your mentor to register as mentor using this link: https://mentorship.cpa-services.org/Mentor/Register.
   - Once their mentor application has been submitted, they will receive a confirmation email. The application will be reviewed by the provincial/regional office and when approved, they will receive another email with detailed instructions on access to PERT and the Centre for Mentoring Resources.
   - When this process has been completed, students/candidates would be able to add the mentor to their profile.
   - Students/candidates who are in progress will not be able to remove their mentor if there is an outstanding mentor review (Mentor review in requested status). The mentor review must either be cancelled or marked completed by the mentor.

Submit a mentor review request

Note: *At least **ONE** Experience report has to be in a 'Verified' state to be able to see the 'Request Review' link.*

1. Log in to PERT
2. Click the *Mentor Reviews* tab found beneath the page heading
3. Click **Request Review** at the bottom of the page
4. Click **Create**

Next steps:

1. Meet with your mentor and have the mentor record the meeting in PERT.

Record the mentor review in PERT

This is a task that must be completed by the Mentor, not the student/candidate. The steps below are only possible if the student/candidate has requested a mentor review.

The following are the steps the Mentors to complete:

1. Log into the Mentor portal — https://pert.cpa-services.org/Mentor/LogOn
2. Click on the student/candidate's name whose mentor review record requires updating
3. Within the student's record, click on the *Mentor Reviews* tab, then click the **Status Date** to open the mentor review record
4. Click **Edit**
5. Indicate the review date
6. Answer the four questions
7. Complete the *Comments* section

8. Identify the date for the *Next Mentor Review*
9. Click **Complete**

Cancel a mentor review request

Warning: *this action cannot be undone. If a request was cancelled in error, a new one must be submitted.*

1. Log in to PERT
2. Click the *Mentor Reviews* tab
3. Under *Status Date,* select the mentor review request to cancel
4. Click **Cancel**
5. Select **Yes** to confirm cancellation

Submit a profession assessment request

1. Log in to PERT
2. Click the **Profession Assessments** tab
3. Click **Request Assessment**
4. Select the applicable AssessmentReason:
   - **Change of Job:** if student/candidate is leaving current employer or returning back to school
   - **12 month assessment:** for EVR student/candidates who must submit an assessment after 12 months of employment
   - **Student Requested:** if student/candidate is requesting feedback
   - **Profession Requested:** if student/candidate was directed by CPA to submit profession assessment
   - **Completion Assessment:** if student/candidate has met all the CPA practical experience requirements and the consolidated summary shows all requirements as met
5. If applicable, select the report that you want assessed. This option is only available to those student/candidates who have the following scenario's:
   - Current PPR student/candidate with PRIOR EV report
   - Current PPR student/candidate with PRIOR PPR report from a **different** employer
   - Current EVR student/candidate with PRIOR PPR

   Note: *Extra step for PPR Students/Candidates whose organization has more than one Program Leader; Select the program leader who would be verifying the report.*
6. Check the **Candidate & Declaration** boxes
7. Click **Create**

Next steps:

1. For PPR students/candidates, the assessment first goes to the Program Leader to verify and reflects a status of certification requested. Once the Program Leader has completed their part of the assessment, the assessment status will change to *Assessment Requested* which means it has been received by the CPA body. Once assigned to a CPA reviewer the assessment status will change to *Required*. For EVR students, the request is assigned directly to a CPA reviewer.
2. When the assessment has been processed, the student/candidate will receive notification by email on the status.

Re-submit a profession assessment

(for a pre-assessment or profession assessment that was returned as follow up to the student/candidate)

1. Log in to PERT
2. Click the **Profession Assessments** tab
3. Click on the **Status** date of the profession assessment with a Follow up status.
4. Click **Re-Submit**. This action will switch the assessment status back to 'Required'.

Cancel a profession assessment request

Warning: this action cannot be undone. If a request was cancelled in error, a new one must be submitted

1. Log in to PERT
2. Click the **Profession Assessments** tab
3. Under Status Date, select Profession Assessment Request you wish to cancel
4. Click **Cancel**
5. Confirm the action by clicking **Yes**
6. Refresh the page by clicking on . The Assessment Request status will now show as 'Cancelled.'

Appendix

Profession Assessment status definitions

(for EVR Students/Candidates)

1. **Assessment Requested** — The student has submitted a profession assessment
2. **Required** — The profession assessment has been assigned for review
3. **Completed** — The profession assessment has been reviewed by CPA
4. **Follow-Up** — The profession assessment has been set to Follow-Up because additional information is required or changes need to be made.

(for PPR Students/Candidates)

1. **Data Check** — The profession assessment is with the program manager for a review before being submitted to your program leader
2. **Certification Requested** — The student has submitted a profession assessment and it is now with the Program Leader
3. **Assessment Requested** — The Program Leader has completed the declaration and submitted the profession assessment to CPA
4. **Required** — The profession assessment has been assigned for review
5. **Completed** — The profession assessment has been completed by CPA
6. **Follow-Up** — The profession assessment has been set to Follow-Up because additional information is required or changes need to be made.

Experience Report status definitions

(for EVR Students/Candidates submitting CURRENT or PRIOR EV experience reports or PPR Students/Candidates submitting PRIOR EV experience reports)

1. **New** — The experience report is with the student
2. **Verification Requested** — The experience report has been submitted to the supervisor for verification
3. **Verified** — The supervisor has submitted the report and completed the verification
4. **Follow-Up** — The report has been set to Follow-Up because additional information is required or changes need to be made. Or the student has selected “re-open” on a verified report and has not selected SUBMIT on the report details to complete the verification process.
5. **Admin Assess** — The experience report has been flagged. CPA receives a notification and will follow up with student/candidate directly.
6. **Reviewed** — The experience report has been reviewed by CPA

Experience Report status definitions

(for PPR Students/Candidates submitting CURRENT or PRIOR PPR experience reports or EVR Students/Candidates submitting PRIOR PPR experience reports)

1. **New** — The experience report is with the student
2. **Verified** — The student has submitted the report
3. **Follow-Up** — The report has been set to Follow-Up because additional information is required or changes need to be made. Or the student has selected “re-open” on a verified report and has not selected SUBMIT on the report details to complete the verification process

4. **Reviewed** — The assessment has been reviewed by CPA
5. **Admin Assess** — The experience report has been flagged. CPA receives a notification and will follow up with student/candidate directly.

Resource Links

- CPA Certification Resource Centre - Resources for CPA Practical Experience Requirements
- EVR - Getting started in PERT
- PPR - Getting started in PERT
- Practical Experience Requirements (PER)
- Harmonized Practical Experience Policies
- Practical Experience Reporting Requirements — Factsheet
- CPA Practical Experience Requirements - Does my job qualify for experience verification?
- PER Self-assessment Tool
- Practical Experience Overview — video
- Practical Experience Reporting Routes — 2 Models, 1 Standard factsheet

For questions or assistance on practical experience and/or PERT, please contact your provincial/regional representative.