<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.com  
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 future CPAs 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 the PERT, and provides further guidance on how Pre-approved Program Leaders (PL) can view future CPAs’ experience reports and complete the necessary declarations.

Pre-approved Program Leader Role
Each Pre-approved Program is the responsibility of a designated PL, who must be a CPA in good standing with a provincial/regional body.

The PL is accountable to the provincial/regional body for ensuring future CPAs gain experience through the organization’s pre-approved program(s).

PLs are also responsible for liaising with the designated CPA mentors to confirm the following future CPA activities have occurred:
• Future CPAs have discussed their progress with their CPA mentors at least semi-annually
• Future CPAs are meeting the progression expectations of the CPA Pre-Approved Program.

Furthermore, the PL must provide the provincial/regional body with a certification signoff for all future CPAs who complete their experience requirement or who depart the pre-approved program during their training period.
2 PERT Logon

Create 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.

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 PPL, is https://pert.cpa-services.org/DevelopmentLeader/Logon.
Reset Password
If you need to reset your password, follow these steps.

1. From the Pre-approved Program Leader 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 navigation.

When first 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 Candidate Details

As a Program Leader, you are able to view the details of the students/candidates in your pre-approved program(s) that have requested a profession assessment. Students/candidates request assessments when they are departing your program or are ready for certification.

You will NOT see a full roster of students/candidates in your program; only those who have requested an assessment. To view a full listing of students/candidates in your training program, please access the Student Roster Report found in Reports section of your PERT portal.
To view candidate detail, click the candidate’s name.

The details associated with the candidate’s *PER Status, Next Professional Assessment, Mentor* and *Next Mentor Review* are set by the profession and are displayed for your information only.

Here is a summary of the information displayed:

<table>
<thead>
<tr>
<th>Detail</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PER Status</strong></td>
<td>Indicates the student/candidate’s current status in fulfilling their practical experience requirements.</td>
</tr>
<tr>
<td></td>
<td>• <em>Pending Enrolment</em>: Action is required on your part. See the <em>Detail Verification</em> section for more information. This status will display as <em>Pending Enrolment</em> in the student/candidate’s profile until employment is confirmed.</td>
</tr>
<tr>
<td></td>
<td>• <em>In Progress</em>: The employment details have been confirmed and the practical experience term is in progress.</td>
</tr>
<tr>
<td></td>
<td>• <em>PER Standard Met</em>: 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 <em>PERT administrator</em>.</td>
</tr>
<tr>
<td><strong>Next Profession Assessment</strong></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>Detail</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</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 In Progress. After the first mentor review has occurred, the mentor will be required to update this date. Note: 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>• New:</td>
<td>Indicates that a student/candidate has created a report but has not completed updating it.</td>
</tr>
<tr>
<td>• Verified:</td>
<td>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.</td>
</tr>
<tr>
<td>• Follow-up:</td>
<td>Indicates that a student/candidate has altered a report in the Verified status but has not selected Submit on the report.</td>
</tr>
<tr>
<td>• Reviewed:</td>
<td>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></td>
</tr>
<tr>
<td>• Current —</td>
<td>experience accumulated after your PER Effective date</td>
</tr>
<tr>
<td>• PRIOR EV —</td>
<td>experience accumulated before your per effective date and is experience verification route type experience</td>
</tr>
<tr>
<td>• PRIOR PPR —</td>
<td>experience accumulated before your per effective date and is pre-approved program route type experience</td>
</tr>
<tr>
<td>• Catch up —</td>
<td>previously approved legacy experience</td>
</tr>
</tbody>
</table>

The Status information indicates the current status of the future CPAs Experience Report(s). All reports should be in a verified status when the student/candidate is requesting a profession assessment.

As a PL, you have access to any experience reports from your pre-approved program. Catch up reports and those from other employers will not be accessible due to privacy and confidentiality concerns.

To view the details of the experience report, click on Employer or Position.
4 Experience Reports

As a Program Leader, you should review experience reports for completeness, accuracy and reasonability. Therefore, the following section is for information purposes only. It provides an overview of a future CPA's experience report and the associated processes for review and assessment.

While you may not need this information on a day-to-day basis, it is a useful reference.

To view the details of an experience report, 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.

As a PL, you will not be able to edit experience reports; however, you are able to view or print them.

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).
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.
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
As a Program Leader, you are expected to attest to the factual accuracy of the technical competency development. Any fatal flaw concerns should be discussed with the CPA student/candidate’s CPA mentor. The CPA mentor may then choose to document any discrepancies that you raised in their Mentor Review section of PERT.

To view the future CPA’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.

   ![Technical Competencies Table]

   Click on the Competency Area to enter your position details and/or self-assess your proficiency levels. After completing a Competency Area, click Save.

<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Related Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting</td>
<td>4 of 4</td>
</tr>
<tr>
<td>Audit &amp; Assurance</td>
<td>0 of 3</td>
</tr>
<tr>
<td>Finance</td>
<td>2 of 3</td>
</tr>
<tr>
<td>Taxation</td>
<td>0 of 3</td>
</tr>
<tr>
<td>Strategy &amp; Governance</td>
<td>0 of 3</td>
</tr>
<tr>
<td>Management Accounting</td>
<td>4 of 4</td>
</tr>
</tbody>
</table>

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 aims 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.

---

### Enabling Competencies

The enabling competency development is to be 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’s/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.

---

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 the meetings with their CPA mentors.

Summary Questions

Question A
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?

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

Program Leaders should use the information in the Consolidated Summary section to view the overall progress of a future CPA. This feature is particularly useful when a future CPA has multiple experience reports.

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

The *Duration Requirement* section provides an overview of the number of leave weeks reported by the future CPA, and any duration penalties applied by the provincial/regional body and the projected Duration Required adjusted for the leave weeks taken in excess of the 20 week 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></th>
<th>Reported Leave</th>
<th>20 allowable leave weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duration Penalty</strong></td>
<td>13 months</td>
<td>13 month penalty</td>
</tr>
<tr>
<td><strong>Duration Required</strong></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 the future CPA. It is separated by Prior Experience and Current Experience, and experience before and after CPA 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>
<th>2.06 months</th>
<th>Maximum of 12 months recognized prior experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Experience</td>
<td>3.1 months</td>
<td></td>
</tr>
<tr>
<td>Current Experience</td>
<td>5.06 months</td>
<td>Maximum of 18 months before PEP Start date</td>
</tr>
<tr>
<td>Experience Before PEP Start Date</td>
<td>0 months</td>
<td>Not Met</td>
</tr>
<tr>
<td>Experience After PEP Start Date</td>
<td>0 months</td>
<td>Minimum of 12 months required</td>
</tr>
<tr>
<td>Penalty</td>
<td>0 months</td>
<td></td>
</tr>
</tbody>
</table>
Competency Assessment

The Competency Assessment section indicates whether the future CPA 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.


<table>
<thead>
<tr>
<th>TECHNICAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Reporting</strong></td>
</tr>
<tr>
<td>- Financial reporting needs and systems</td>
</tr>
<tr>
<td>- Accounting policies and transactions</td>
</tr>
<tr>
<td>- Financial report preparation</td>
</tr>
<tr>
<td>- Financial statement analysis</td>
</tr>
<tr>
<td><strong>Audit &amp; Assurance</strong></td>
</tr>
<tr>
<td>- Internal control</td>
</tr>
<tr>
<td>- Internal audit or external assurance requirements, basic and risk assessment</td>
</tr>
<tr>
<td>- Internal audit projects or external assurance engagements</td>
</tr>
<tr>
<td><strong>Finance</strong></td>
</tr>
<tr>
<td>- Financial analysis &amp; planning</td>
</tr>
<tr>
<td>- Treasury management</td>
</tr>
<tr>
<td>- Capital budgeting, Valuation, Corporate finance</td>
</tr>
<tr>
<td><strong>Taxation</strong></td>
</tr>
<tr>
<td>- Income tax legislation and research</td>
</tr>
<tr>
<td>- Tax compliance: corporate or personal</td>
</tr>
<tr>
<td>- Tax planning: corporate or personal</td>
</tr>
<tr>
<td><strong>Strategy &amp; Governance</strong></td>
</tr>
<tr>
<td>- Governance Mission, vision, values &amp; mandate</td>
</tr>
<tr>
<td>- Strategy development / implementation</td>
</tr>
<tr>
<td>- Enterprise risk management</td>
</tr>
<tr>
<td><strong>Management Accounting</strong></td>
</tr>
<tr>
<td>- Management reporting needs and systems</td>
</tr>
<tr>
<td>- Planning, budgeting and forecasting</td>
</tr>
<tr>
<td>- Cost / revenue / profitability management</td>
</tr>
<tr>
<td>- Organizational / individual performance measurement</td>
</tr>
</tbody>
</table>
2. For a detailed view, select a technical sub-competency. A summary of student/candidate responses, position duties, circumstances, complexity, autonomy, target proficiency, self-assessed proficiency, profession assessed proficiency, duration, and status are displayed.

<table>
<thead>
<tr>
<th>TECHNICAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting</td>
</tr>
<tr>
<td>✓ Financial reporting needs and systems</td>
</tr>
<tr>
<td>✓ Accounting policies and transactions</td>
</tr>
<tr>
<td>✓ Financial report preparation</td>
</tr>
<tr>
<td>✓ Financial statement analysis</td>
</tr>
</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 appear.

<table>
<thead>
<tr>
<th>ENABLING</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Professional and Ethical Behaviour</td>
</tr>
<tr>
<td>✓ Problem-Solving and Decision-Making</td>
</tr>
<tr>
<td>✓ Communication</td>
</tr>
<tr>
<td>✓ Self-Management</td>
</tr>
<tr>
<td>✓ Teamwork and Leadership</td>
</tr>
</tbody>
</table>

2. For a detailed view, select an enabling competency. The detailed view appears and provides a summary of the future CPA's responses, self-assessed proficiency, profession assessed proficiency, duration and status.
6 Profession Assessments

The Profession Assessments section displays any profession assessments requested by the CPA 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:

1. The future CPA must request a professional assessment in PERT. The Assessment Status will be Certification Requested. An automated email was sent to you as Program Leader

2. As Program Leader you must sign off on the assessment by making a declaration in PERT. See Section 7: Certification Requested.

Tiered Profession Assessment: Data Check

If you, as a Program Leader, would like your Program Manager 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 the Program Manager would be copied on the system generated email that you receive as Program Leader.

If you, as a Program Leader, would like your Program Manager to review a profession assessment before it is submitted to you for sign-off, 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. The Program Manager, has the option to (1) Approve the profession assessment which will then send it to you for sign-off, or (2) Return the assessment to the student/Candidate should changes be needed.

**Note:** The Data Check feature or the email notification can be turned on or off at any time by contacting your provincial/regional body.

When completing the Data Check it is recommended that the Program Manager 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 “completed” status
4. All relevant experience reports are in “verified” status
5. Self-assessed proficiency levels for the technical sub-competencies are appropriate
   - 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
If the Program Manager selects Approve, they have the option to leave comments for you. These comments called Data Check Comments will be visible in your program leader declaration. Note that comments are visible to all portal users.

<table>
<thead>
<tr>
<th>TECHNICAL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting</td>
<td></td>
</tr>
<tr>
<td>Financial reporting needs and systems</td>
<td>Level 0</td>
</tr>
<tr>
<td>Accounting policies and transactions</td>
<td>Level 0</td>
</tr>
<tr>
<td>Financial report preparation</td>
<td>Level 0</td>
</tr>
<tr>
<td>Financial statement analysis</td>
<td>Level 0</td>
</tr>
</tbody>
</table>
When future CPAs believe they have completed all of the practical experience requirements or they are departing your pre-approved program, they are required to request a profession assessment. Unlike other profession assessments, the Program Leaders are required to provide the provincial/regional body with a certification sign-off for all future CPAs who complete their experience requirements or who depart the pre-approved program. Although it is the Program Leader’s responsibility to declare whether the experience reports are accurate, including verifying time away from work and that the mentor review meetings have occurred, Program Leaders can use their discretion to delegate the verification of this task to their respective Program Managers (See Tiered Profession Assessment: Data Check).
To view the candidate’s details, click the name of the candidate.

You will be directed to the main page, the Experience Reports. You should do the following:

- Review Report Details within the experience report to ensure start and end dates and leaves taken are accurate
- Consolidated Summary - Select the appropriate experience reports and then select Assess
  - Review the technical and enabling competency development for reasonability
- Review notes within the experience reports
  - Review Mentor Review comments
Once you have conducted your review, please go to the Profession Assessment screen to access the Program Leader Declaration.

**Profession Assessment**

To view details of the assessment, click the associated **Status Date**.

To make your declaration to confirm that the candidate completed their duration, click **Edit** to enter details. The **Edit Profession Assessment** screen appears.
**General**

The General section displays details of the Profession Assessment requested.

---

**Pre-approved Program Leader Declaration**

**Statement 1**

As a Program Leader, you must confirm if the dates reported (Start and end date) are accurate, including any leaves taken.

---

To make the declaration, select **Agree**. Otherwise, select **Disagree**.

**Note**: if Disagree is selected and the declaration is Saved then the assessment will be cancelled. You will be required to provide comments as to why you selected Disagree.
**Statement 2**
As a Program Leader, you must confirm that the student/candidate was appropriately mentored and supervised while in your pre-approved program.

*Note:* if Disagree is selected, you will be required to indicate why you are disagreeing

To make the declaration, select **Agree**. Otherwise, select **Disagree**.

**Statement 3**
As a Program Leader, you must certify the student/candidates reported experience from your pre-approved program. You must select one of three options:

**Option A:** student/candidate spent all 30 months in your pre-approved program and is now complete.

**Option B:** Student/Candidate indicates Practical Experience Requirements are met. However, student/candidate did not spend all 30 months in your pre-approved program

**Option C:** Student/Candidate has departed from your pre-approved program.

To make the declaration, select the correct option and **Agree**. Otherwise, select **Disagree**.
If you have agreed with Statement 1 and have completed Statement 2 and Statement 3, click **Save** to complete the declaration. Comments are available if you would like to make a note, but they are not required.

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

The window can now be closed. Once the profession assessment declaration has been made, the assessment is submitted to the provincial/regional body for review and approval. At this point, you are not required to conduct any additional tasks for this candidate.
To access the reports available to you, as Program Leader, click **Reports**, located on the left-hand navigation.

As Program Leader, you have access to the following reports:

- Student Roster Report
- Non-Compliance Report
To access any one of these reports, click **Export**.

Each report will open in 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/candidates profile.

**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 Leader, with 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:** The 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
PER 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 (see Chapter 3 Student/Candidate Details)
- **Unemployed**: Student/Candidate has identified themselves as being “unemployed”
- **PER 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: Is the date that practical experience will begin to accumulate towards a student/candidates 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/candidate
Total Number of Mentor Reviews Completed: Total mentor reviews completed and documented in PERT by mentor
Last Completed Mentor Review: The date which the student’s/candidate’s 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's/candidate's last mentor review date was more than 6 months ago, a “YES” will be displayed. If the student's/candidate's 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’s/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