<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  
Phone: 416.962.1841 or 1.800.387.0735  
Mentor inquiries: mentor@cpaontario.ca                                               |
| 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

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.

After you setup your CPA Mentor profile in PERT, you will be expected to access PERT both before and after meeting with your future CPA(s) (also referred to as CPA students/candidates).

This user guide provides guidance on how to use PERT to access your future CPA(s) experience reports and document your required semi-annual meetings.

As a CPA Mentor, you are responsible for:
• meeting with your future CPAs at least semi-annually
• documenting your Mentor Reviews in PERT once they have occurred.
• documenting any unresolved competency development concerns in PERT

You are not expected to verify the factual accuracy on future CPAs experience reports.

For additional guidance on your roles and responsibilities as a CPA Mentor, please visit the Centre for Mentoring Resources.
2 Experience Reports

Once you have logged into PERT, the homepage will appear and you will see a list of the future CPA(s) you are currently mentoring.

The Status column will display one of the following options:

- **Review Requested**: Indicating that a mentor review has been requested by your future CPA. For more information on how to fulfill a review request, see Chapter 7: CPA Mentor Reviews.

- **Review Overdue**: Indicating that the future CPA is overdue for their semi-annual Mentor Review.
To view the experience report for your mentee, follow these steps.

1. Click the name of the student/candidate who has requested the mentor review. A list of all the experience reports submitted by your student/candidate will appear.

**Note:** The information in the Status column displays the status of the future CPAs’ experience report. As a CPA Mentor, you should focus on report(s) with a Verified status only.
Here is a summary of the information displayed:

<table>
<thead>
<tr>
<th>Detail</th>
<th>Description</th>
</tr>
</thead>
</table>
| PER Status                     | Indicates the student/candidate’s current status in fulfilling their practical experience requirements.  
• **Pending Enrolment**: Action is required on your part. See the [Detail Verification](#) section for more information. This status will display as **Pending Enrolment** in the student/candidate’s profile until employment is confirmed.  
• **In Progress**: The employment details have been confirmed and the practical experience term is in progress.  
• **PER Standard Met**: The student/candidate has met all the practical experience requirements.  

If any other information is displayed, please contact your local PERT administrator.                                                                                                                                                                                                     |
| Next Profession Assessment     | 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.                                                                                                                                                                                      |
| Next Mentor Review             | 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.                                                                                                                                                                  |
| PER Effective Date             | 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. |
| Status                         | Indicates the current status of the student/candidate's experience report(s).  
• **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.                                                                                             |
| Report type                    | • Current — experience accumulated after your PER Effective date  
• PRIOR EV — experience accumulated before your per effective date and is experience verification route type experience  
• PRIOR PPR — experience accumulated before your per effective date and is pre-approved program route type experience  
• Catch up — previously approved legacy experience                                                                                                                                                                                                                                                                 |
2. To review the details of your mentee's experience report, click on Employer Name or Position which will take you to the report details.
Experience report details are separated into different sections.

### User Test13 - Accountant - Company XYZ (21/09/2016 - 30/12/2016)

#### Report Details

<table>
<thead>
<tr>
<th>Position</th>
<th>Report Details</th>
<th>Technical Competencies</th>
<th>Enabling Competencies</th>
<th>Notes</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Status Verified</td>
<td>Calculated Duration: 3.32 months</td>
<td>Duration Recognized:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Status Change Date: 26/02/2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Report Type: Current Experience</td>
<td>Experience Type: Experience Verification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Position Title: Accountant</td>
<td>Employer: Company XYZ</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training Position:</td>
<td>Month-to-month</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Position Type: Permanent</td>
<td>Start Date: 21/09/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Avg Hrs/Week: 39:00</td>
<td>End Date: 30/12/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leave Taken (days): 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Employer Address

- Street Address: 123
- City: Litchfield
- Province: Ontario
- Country: Canada
- Postal Code: N/A

#### Employer Profile

- Primary Customers/Client: External Corporate
- # of Employes (Office): 100
- # of Employes (Dept): 3
- Type of Industry: 
- # of CPA’s Employed: 1 - 3
- # of Staff Supervised by CPA Candidate: 0

#### Supervisor Verification

- Supervisor First Name: mcdonald
- Supervisor Last Name: mcdonald
- Supervisor Email: emcdonald@spaontario.ca
- Supervisor Designation: CPA, CGA
- Supervisor Title; 
- Supervisor Phone Number: 5736
- Supervisor Language Preference: English
### Sections Report Details

**Status**
- This section displays read only information related to experience report’s Status, Status Change Date, Calculated Duration and Duration Recognized (if the report has been approved by a CPA Reviewer).
  - **Calculated Duration**: The overall period of the time recorded in the experience report.
  - **Duration Recognized**: The period of time that will count towards the 30-month minimum period of practical experience, as this is the period that has been recognized by the profession.

**Position**
- This section displays read only details associated with the position held by the candidate, including:
  - **Report Type**: Indicating whether the report recognizes current or prior experience.
  - **Avg Hrs/Wk**: Denoting the average weekly hours worked by the future CPA during this experience report.
  - **Experience Type**: Indicating whether the future CPA is enrolled in the experience verification route or pre-approved program route.

**Employer Address**
- For pre-approved programs, the employer address, employer profiles and Supervisor verification sections are normally blank.

**Employer Profile**
- This section provides a high level overview about your future CPA’s employer, including industry, and number of employees. This information is useful in determining the complexity of the future CPAs role.

**Supervisor Verification**
- This section provides details about the future CPA’s Supervisor.

### Technical Competencies

To view the future CPA’s self-assessment of technical competency development during the reporting period, follow these steps.

1. From the homepage, click the name of the student/candidate.
2. Click the **Employer Name or Position**. New tabs are displayed.
3. Click **Technical Competencies**.
Note: For Technical Competency reporting, Experience Verification Route students/candidates must describe their position duties in their own words, whereas pre-approved program students/candidates have their position duties pre-populated. As a CPA Mentor, you are not expected to attest to the factual accuracy or the proficiency level of CPA students/candidates’ technical competency development; however, you are expected to document any of your concerns.

4. 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, and the future CPA’s assessment of the proficiency achieved.
The **Target Proficiency** column displays the proficiency level that the future CPA aims to achieve by the end of the entire practical experience period. It is not mandatory for the students/candidates to meet the target proficiency prior to the 30 month duration for practical experience, but it is recommended as a useful planning tool.

The **Self-assessed proficiency** displays the current level of proficiency in which the future CPA assesses themselves to have achieved. The Profession Assessed proficiency value is assigned by the CPA reviewer.

If you have any concerns, document them in the *Mentor Review* section. For more information, see *Chapter 7: Completing a Mentor Review*.

**Enabling Competencies**
Future CPAs track their enabling competency development by responding to five, three-part questions and two summary questions. They are not required to answer all enabling competency questions; only those that pertain to the competencies developed in the reporting period.

*Note*: Employers have access to review the five enabling competency answers.

You should discuss and review the enabling competency development with your student/candidate on a semi-annual basis.

**Reflective Questions**
To view the future CPA’s self-assessment of enabling competency development during the reporting period, follow these steps.

1. From the homepage, click on the name of the student/candidate.
2. Click the Employer name or position, new tabs are displayed.
3. Click **Enabling Competencies**, the *Reflective Questions* screen appears.
4. If you have any concerns document them in the Mentor Review. For more information, see Chapter 7: CPA Mentor Reviews.

   **Note**: Information you enter here will be visible to all.

**Proficiency Levels Rubric**

The proficiency level rubric consists of the criteria used to evaluate the development of future CPAs as they work to achieve the required Level 2 proficiency for each of the five enabling competency areas.

To access the proficiency levels rubric, click found in the upper right corner of the Enabling Competencies section.
<table>
<thead>
<tr>
<th>The CPA Way</th>
<th>Level 0</th>
<th>Level 1</th>
<th>Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proficiency Levels</strong></td>
<td><strong>The CPA Way</strong></td>
<td><strong>Level 0</strong></td>
<td><strong>Level 1</strong></td>
</tr>
</tbody>
</table>
| **Adopt the CPA Mindset** | • Exhibit a desire to learn from past experiences | In addition to Level 0:  
  • Exhibit skepticism about own professional/ethical behaviour | In addition to Level 1:  
  • Demonstrate insight into link between at least one CPA value (e.g., objectivity, due care, integrity) and own professional/ethical behaviour |
| **Assess the Situation** | • Describe facts about the situation and step(s)/action(s) taken  
  • Identify at least one factor that is relevant to the situation:  
    - Stakeholder that is affected by decision(s)/action(s)  
    - Professional value  
    - Something viewed as creative/innovative | In addition to Level 0:  
  • At least partially explain what was at stake  
  • Identify a wider range of factors that are relevant to the situation:  
    - Multiple relevant stakeholders, including the organization  
    - Objectives/goals/priorities  
    - More than one relevant professional value | In addition to Level 1:  
  • Identify more than one potentially viable alternative |
| **Analyze Major Issue(s)** | • Provides partial/superficial analysis (e.g., focus only on arguments in favor of action(s) taken), including at least one:  
  • Impact of action(s) taken on stakeholders and their goals/objectives/priorities  
  • How/why the situation involved a conflict in professional values  
  • Effect of creativity/innovation on actions and/or conclusions | In addition to Level 1:  
  • Thoroughly explain/analyze alternatives and issues, including consideration of multiple viewpoints (e.g., address both pros and cons of alternatives/actions/conclusions) |
| **Conclude and Advise** | • Attempt to describe at least one idea that would have made it easier to act, that could have been done differently, or that was learned from the situation | In addition to Level 1:  
  • Provide at least 1-2 logical reason(s)/conclusion(s) such as:  
    - Why course of action was taken  
    - How this experience is likely to have a positive effect on future behaviour | In addition to Level 1:  
  • Identify criteria used and provide a reasonable and feasible conclusion about what would make future behavior more professional/ethical  
  • Recognize at least one significant limitation of action(s)/conclusion(s) |
| **Communicate** | • Demonstrate an awareness that communication can be improved | In addition to Level 0:  
  • Provide at least 1-2 logical reason(s) to explain how communication achieved a purpose such as:  
    - Obtained accurate and reliable information  
    - Enhanced work performed  
    - Met audience needs | In addition to Level 1:  
  • Provide reasonable and feasible conclusion about what would make future communication more effective  
  • Recognize at least one significant limitation of future communication effectiveness |
Summary Questions
While Future CPAs can answer both summary questions, only question A is mandatory irrespective of how many enabling competencies they achieved during the period.

Question A: Is important to allow your future CPA(s) to set specific development targets between your meetings. You should review the responses to these questions prior to your meeting(s).

Notes
The Notes tab contains all the status changes of the experience reports, as well as any notes you (or a previous CPA Mentor) and/or CPA reviewers have entered.
All notes are visible to future CPAs and other PERT users with access to this future CPA’s profile.

**Attachments**
Future CPAs are able to attach files, such as resumes or job descriptions, to their experience reports. To view the attached files, follow these steps.

1. From the homepage, click the name of the student/candidate.

2. Click the *Employer Name* or *Position*. New tabs are displayed.

3. Click *Attachments*.

4. To review an attached file, click *Choose File*.
3 Consolidated Summary

The Consolidated Summary allows you to view the overall progress of your mentee. This feature is particularly useful when a future CPA has multiple experience reports.

Select the experience report(s) to be included in the consolidated summary and click Assess. Only verified reports should be included.
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 week includes time away from work for such reasons as vacation, sickness, professional development, and/or study time.

Eligible Practical Experience
The *Eligible Practical Experience* section provides an overview of the eligible practical experience completed by the future CPA. *Prior and Current Experience* and *Before and After the PEP Start Date* are separated. *Current experience* is experience accumulated after a CPA student/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 to the end from the last 5.5 years. This summary indicates whether the future CPA has met the required duration. CPA students/candidates may accumulate up to 18 months of qualifying practical experience before commencing the CPA Professional Education Program (CPA PEP). No further qualifying experience will be recognized beyond 18 months until they register in the CPA PEP.

Competency Assessment
The *Competency Assessment* section indicates whether the future CPA has met the specified technical (core, breadth and depth) and enabling competency requirements.
Technical Competencies
To view more information on the details of the technical competencies within the consolidated summary, follow these steps.

1. View Technical. The list of technical competencies and sub-competencies appears.

2. For a detailed view, select a technical sub-competency.

The detailed view of the technical competency appears, and provides a summary of future CPA responses, position duties, circumstance, complexity, autonomy, target proficiency, self-assessed proficiency, profession assessed proficiency, duration, and status. Please review the proficiency achieved for overall reasonability given time spent in the role and work completed.

Enabling Competencies
To view a summary of your future CPA’s responses, proficiency attained, duration and status, follow these steps.

1. Under Competency Assessment, view Enabling. The list of enabling competencies appears.

2. Click one the five enabling competencies. The summary view appears.
Future CPA's are required to update their experience report(s) and request a mentor review semi-annually. During this review, they will discuss their competency development (reported in their experience report). The role of a CPA Mentor is to guide future CPAs in their enabling competency development and help ensure their self-assessment (in both enabling and technical) is reasonable.

**Viewing Mentor Review Requests**

When a future CPA requests a mentor review via PERT, you will receive an email notification.

1. Within the email, click the link provided. You will be prompted to log into PERT.

2. Log into PERT. You will see that in the Status column there is a Review Requested. Click on your mentee's name.
Completing a Mentor Review

CPA Mentors are required to document in PERT that they have completed a mentor review after they have met with their mentee.

To complete a mentor review, follow these steps.

1. Click on Mentor Reviews, click on the date in the Status Date column and click Edit.
2. For **Review Date**, enter the date you met for the mentor review.

3. For selecting **Yes/No**, select either yes or no for each of the four items.

4. For **Comments**, please provide a summary of your discussion, click on ![link](https://example.com) to view some examples of what to comment on.

   **Note:** Comments are visible to the future CPA and their employers.
5. For **Next Mentor Review**, enter the date you and your mentee have scheduled for the next mentor review. Remember, your mentee is required to have a mentor review semi-annually, so if you do not have a confirmed date, select a date within the next 3-6 months. This date will activate a reminder email to be sent to your mentee.

6. Once you have entered the required information, click **Complete**.
5 Profession Assessments

To get their experience reviewed by the profession, future CPAs must request a professional assessment of their experience. The *Profession Assessments* tab displays your mentee’s profession assessments.
6 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 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.