

A GUIDE TO COMPLETING EXPERIENCE VERIFICATION REPORTS

THE PROCESS



1. Create an Experience Report

Create your first experience report about six months after your PER Effective Date¹. Relevant work experience gained prior to this date can be captured in a prior experience report, but will be capped at 12 months and must have been gained in roles that ended in the past 5.5 years. You must complete a separate experience report in PERT to claim this. Once you have completed your report, go to the Consolidated Summary" tab and click "Assess" for the reports you have completed to date. Do the competencies and levels you are claiming seem reasonable based on the length of time you are reporting? See page two of this document for additional guidance.

¹ Your PER Effective Date is the date your current employment experience begins to be recognized towards the 30-month duration requirement. This date is in your PERT profile.

2. Obtain Verification

Obtain supervisor verification of your experience report(s) by clicking "submit" on each experience report.

3. Meet with Your Mentor

Once your supervisor has verified your report(s), you can [request a mentor meeting](#) through PERT.

4. Update Your Report

Update your experience report as required based on your mentor meeting discussions. If you do make any changes, you will need to have your report re-verified by your supervisor. Ensure that your mentor documents a summary of your discussion in PERT and sets a date for the next mentor meeting. CPA Ontario will review all reports in a "Verified" status. If you have any prior experience to report, make sure you have this report completed for your first profession assessment.

5. Submit a Request

Request a Profession Assessment

- By the date recommended by the Reviewer of your Pre-assessment as indicated in the "Next Profession Assessment" date in PERT." You should have a recent experience report completed and mentor review documented before doing so.
- At the end of your employment term (select "Change of Job" as the reason for assessment) and follow [these steps](#).
- When you have met all practical experience requirements (select "Completion" as reason for assessment).

Processing time may take up to six weeks.

6. CPA Ontario Review

Upon review of your submission to CPA Ontario, your reviewer will assess/assign the appropriate proficiency level and provide notes under the technical/enabling competency area. They will set your report to a “reviewed” status, recognize duration, and complete your assessment.

If this was not your final report, you will be provided with the date of your next expected profession assessment. This date assumes you remain employed in your current position. You must request a profession assessment ahead of this date if you change positions or employers.

You may not receive approval for all the competencies you have claimed on your report. As long as you meet requirements to continue beyond 12 months, you do not need to submit another report until you have met all the exit requirements², unless otherwise indicated by the Reviewer.

² CPA Ontario may, on occasion, require you to make revisions to your duties or clarify your responsibilities. You will have 30 days to respond. (Note: if the revisions are not completed within 30 days, your Profession Assessment request will be cancelled and your report will be returned to “new” status. Once you have completed any revisions, you will submit your experience reports for verification again. Once obtained, resubmit your Professional Assessment request. Processing time for resubmission is approximately two weeks.

CHECKLIST FOR COMPLETING AN EXPERIENCE REPORT

TECHNICAL COMPETENCIES

- Refer to the [Guiding Questions](#) document for help on what information to document in your technical competencies.

Are the competencies that you are claiming reasonable?

- Does your job description support them? If not, it is recommended that you add a comment about how you have been able to gain additional opportunities outside of your job description.
- For example, if you are in a Financial Analyst position, it would not be expected that you are developing the Audit & Assurance competencies. If you have done a special project to gain competencies outside of your normal responsibilities, note this clearly in your response, as well as how long you were on the project.

Are you claiming the right amount of competencies and are they at the right level?

- Students only need to achieve a minimum of eight sub-competencies overall, with minimum four of them at a Level 2, in a minimum of 30 months (and a maximum of seven years) of practical experience. Typically, after 12 months of employment, a student claims three to four competencies, with most at Level 1. If a student has significant prior experience or an extremely robust position, then it may be possible for them to achieve atypical results within 12 months. Typically, depth, breadth and core would not be met in less than 24 months.
- Please assess your reports using the “Consolidated Summary” tab in PERT for details.

Refer [here](#) for more information on the core, depth, breadth, and progression requirements of the program.

Have you claimed the same duty/task in more than one competency?

- Reviewers will check to see that each competency is supported by a unique set of position duties. Carefully review the competency requirements and examples that have been provided to see where your job duty best fits. See the blue question mark beside each sub competency in PERT.

In order to achieve proficiency, you must demonstrate all parts of the competency as outlined, even at a Level 1. If you do not meet all of the requirements of the competency, you will be assessed at a Level 0.

- Are your examples unique to your position and did they occur during the time period covered by your report?
- For competencies with multiple parts, can your reviewer see which “or” statement you are targeting, or see that all “and” statements have been met?
- It is not sufficient to copy and paste the requirements or examples provided in reference sources/material. If your report is completed using “copy and paste,” it will be returned to you for revision.
- To see a useful video that provides more guidance on how to complete your technical competency responses, [click here](#).

Do you feel you are at Level 2 in one or more of your technical competencies? Ensure your situation supports this and documentation reflects this. Achieving Level 2 is the right combination of complexity, autonomy and frequency. Here are some factors that CPA Reviewers will consider when deciding if a Level 2 can be assessed:

- **Autonomy:** you are working on tasks more independently as you progress through your work term.
- **Complexity:** the type of analysis you are performing must demonstrate a certain degree of difficulty in order to achieve a level 2. Ensure that you document what these factors are. Complexity involves applying judgment, weighing options and considering interrelationships. A more complex task is often non-routine in nature, has multiple interrelationships that must be considered simultaneously and may require innovative approaches.
- **Frequency:** how often have you performed this task (ie monthly, quarterly, annually)? If you are only executing a task once or twice, you’ll likely need more time before you can demonstrate a Level 2 proficiency. Ensure you document the frequency of your work.
- **Recommendations:** achieving a level 2 does not just involve performing a good analysis. You must also provide recommendations as part of this process which demonstrate the impact to your organization.
- **Multiple examples:** Ensure you provide multiple examples of the complex work you have performed in order to demonstrate your proficiency.
- **Progression:** Progression demonstrates the ability to perform more difficult, less routine work with increasing autonomy throughout your work term. At the start of your experience, your work may be largely confined to retrieving and comprehending information (Level 0). At the end of your experience, you are expected to have developed the ability to problem solve, as well as take on increasingly complex and less routine work (Level 2).

Are you working in a public accounting firm environment?

- If so, you are required to provide additional information in order for CPA Ontario to review your experience report.
- [This document](#) will need to be filled out, signed by your supervisor and attached to your experience report in PERT before you submit the report for supervisor verification.

ENABLING COMPETENCIES

Have you demonstrated an in-depth understanding of the situation you are reporting on in your enabling competencies?

- One or two sentences are not sufficient to fully address the enabling questions. For example, sections (a) of questions 1 and 2 have multiple parts. Following the CPA Way will help ensure your enabling competency responses are appropriate. Where applicable, ensure you have explained alternative actions you could have taken as well as the pros and cons of each. You can find the CPA Way assessment rubric in PERT by clicking on the blue question mark next to the heading 'enabling competencies' in the Enabling Competencies tab.
- Section (c) of each question is intended to encourage you to reflect on your growth in that competency area. Identifying areas of weakness, as well as areas of strength, will help the reviewer see that you have considered your own professional growth and the implications of your actions. Ensure you have demonstrated a deep reflection on what you have learned from the situation and how you would apply this to a similar situation you may encounter in the future. What would you do differently next time?
- Summary Question A is required for every report. As a best practice, Question B should also be answered.
- As you are completing your enabling competency responses, keep in mind that you need to achieve a Level 2 proficiency in all the enabling competencies by the completion of your term of practical experience. To see a useful video that provides more guidance on how to complete your enabling competency responses, [click here](#).
- The responses you provide must relate to your practical experience environment you are reporting on. They cannot relate to a previous role or to the CPA Professional Education Program.

Is your style of communication professional and does it clearly demonstrate what you have accomplished?

- Remember that this is a formal report of your experience that is being submitted to the profession for assessment. You may be asked for revisions if your spelling and grammar are not at a professional level.
- The reviewer needs to understand from your description what you performed as an individual. Avoid using phrases such as:
 - My team performed...
 - My company
 - I am able to...

Please clearly state **what tasks you completed on your own**, even if your work was reviewed.

Have you reviewed your report with your mentor?

- Please review your report with your mentor during your semi-annual meetings before submitting a profession assessment. Any areas of concern with your report should be discussed with your mentor or supervisor as appropriate.