PRACTICAL EXPERIENCE CHECKLIST

The purpose of this document is to provide you with a checklist of steps to follow through your practical experience journey in PERT, as well as providing additional resources for each step along the way. Save this document and check off each step as you complete it.

	STEP IN PROCESS	DETAILS
1	☐ Review the Practical Experience Welcome Package	This document provides an overview of the practical experience journey and how to get started.
2	☐ Create profile in PERT	Setting up your PERT profile ▶ TIP **You can still create a profile even if you don't yet have a CPA Mentor, however you won't be able to start reporting any experience until you have added a Mentor.**
3	☐ Set your PER Effective Date	PPR: Confirming your Pre-approved Program ▶ EVR: Submitting a pre-assessment ▶
4	☐ Self-assess your current experience semi-annually in PERT (every 6 months is recommended) ☐ Report 1 ☐ Report 2 ☐ Report 3 ☐ Report 4 ☐ Report 5	Create an experience report and self-assess your competency development (Technical ▶ & Enabling ▶) for that reporting period. EVR students should review the Guide to Completing EVR Reports and use the Guiding Questions to document their technical competencies. The process for your supervsior to verify your EV reports can be found in the Supervisor Verification Instructions document. Complete a Prior experience report if you have any experience from before your PER Effective Date. TIP **A report in "Verified" status means you have completed it. You can also request a mentor meeting once you have a report in Verified status. Whenever you request a profession assessment, we will review your reports that are in a Verified status.** **You are not required to have a mentor meeting to discuss any prior experience you report, but it is recommended.**
5	☐ Meet with your CPA Mentor semi-annually to discuss your verified experience reports ☐ Meeting 1 ☐ Meeting 2 ☐ Meeting 3 ☐ Meeting 4 ☐ Meeting 5	Mentorship Program Steps – EVR Mentorship Program Steps - PPR TIP **Run the Consolidated Summary in PERT during your mentor meetings to see how you are tracking against the practical experience requirements.** **There is a one-month duration penalty for every missed mentor meeting so be sure to keep up with your semi-annual reporting.**
6	☐ Request a Profession Assessment	We review your experience once you have requested a Profession Assessment in PERT. Refer to the "Next Profession Assessment Date" in PERT or if you have switched jobs, please refer to the Change of Job Factsheet.

Repeat the steps above as necessary until we have approved all of your practical experience.

Once we have determined that you have met the practical experience requirements, you will receive an email outlining admission to membership process if you have already completed the education requirements (PEP & CFE).

Additional Resources:

- CPA Ontario Practical Experience Requirements
- Quick Reference for PERT tasks
- PERT User Guide for Students in EVR
- PERT User Guide for Students in PPR
- Pre-recorded Webinars
- FAQs

If you need any help along the way, we can be reached at practicalexperience@cpaontario.ca or mentor@cpaontario.ca or visit our website at cpaontario.ca.