COMPLETING A MENTOR REVIEW

1 OBJECTIVE

The objective of a Mentor Review is to discuss the development of competencies, provide feedback on progress and advise on how to develop skills.

1. Guide and develop the Enabling Competencies:
    - Professional and Ethical Behaviour
    - Problem Solving and Decision Making
    - Communication (oral and written)
    - Self-Management
    - Teamwork and Leadership

2. Review Technical Competencies for reasonableness.

Mentors and students are required to meet at least twice a year for a Mentor Review and at the end of every work term and/or change of job. In addition to two formal reviews, informal meetings are optional.

All formal Mentor Reviews should be completed on or before the Next Mentor Review date specified in PERT. Students will be required to complete an additional 30 days duration for every missed Mentor Review.

2 PREPARATION

It is your mentee's responsibility to request the Mentor Review through PERT before you meet. In preparation for this review, take a look at the recent experience report(s) prepared by your mentee.

1. Log in to *PERT*.

2. Click on the name of your mentee.

3. Click on the employer name for the report you wish to view.

4. Check the "Technical Competencies" tab, and confirm you are satisfied with the reasonableness of their self-assessment.

5. Review the "Enabling Competencies" tab. Make notes on any development you wish to discuss and prepare any questions you have for your mentee.

During the Mentor Review, make a note to discuss your mentee's development in the Enabling Competencies. Encourage your mentee to do most of the talking, come to their own conclusions, and set their own goals. If necessary, you can discuss whether your mentee is self-assessing at a reasonable level for their Technical Competencies.

3 COMPLETE

Mentors are responsible for completing the Mentor Review in PERT and providing a summary of the discussion.

1. Log in to *PERT*.

2. Click on the name of your mentee.

3. In the "Mentor Review" tab, click on the date for the requested review.

4. Click on "Edit."

5. Enter the required information.

6. Click "Complete."

Mentors are not expected to approve the student's Technical Competency development, but may need to check the student's self-assessment for reasonableness. Mentors are expected to discuss student's Enabling Competency development, encourage self-reflection and discussion to help their mentee self-assess and provide good answers.

They must have no less than two documented Mentor Reviews per year. If students do not have the minimum two mentor reviews reported in PERT for every 12 months of current experience, they will be required to complete an additional 30 days duration on top of their minimum duration of 30 months.

CPA ONTARIO