

# PERT User Guide

*CPA Students/Candidates Working  
in the Experience Verification Route (EVR)*

Effective January 1, 2018

CPA provincial/ regional bodies	CPA Practical Experience Requirements contact information
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# 1 Introduction

## Qualifying Practical Experience

In addition to formal education and successful completion of the Common Final Examination, the new CPA certification program requires future CPAs to complete a term of relevant practical experience. The minimum required term is 30 months (24 months in Quebec) of paid employment during which future CPAs demonstrate that they have gained the professional knowledge, skills, values, ethics and attitudes required for entry to the CPA profession. This minimum employment period includes allowances for time off (such as vacation, illness, and study leave).

Future CPAs are required to use PERT to update their experience reports at least semi-annually. These reports are assessed by your provincial/regional bodies. For more information, see the [CPA Practical Experience Reporting Requirements factsheet](#).

## Practical Experience Orientation Webinar<sup>1</sup>

Future CPAs are required to complete and achieve a passing score of 60% on the CPA Practical Experience Orientation webinar in D2L BEFORE they can gain access to PERT. Once a student has achieved a 60%, they must wait one business day to access PERT.

**Note:** You will not receive notification once you are granted access to PERT simply wait one business day then log into PERT.

## Welcome to PERT

Future CPAs are expected to document their development of technical and enabling competencies for it to be assessed and recognized by the profession.

Your experience must be documented within the CPA Practical Experience Reporting Tool (PERT) and this guide outlines how to create your PERT profile after logging into PERT for the first time.

You will only be able to create a profile after successfully completing the mandatory CPA Practical Experience Orientation webinar<sup>1</sup> in Brightspace (D2L), the profession's online learning platform.

<sup>1</sup> Students registered with CPA Ontario are not required to complete the CPA Practical Experience Orientation webinar.



## 2 Create PERT Profile

To log onto PERT for the first time, follow these steps.

1. Use your CPA secure logon ID. Your email address must be the same as the one used to log onto the CPA secure portal.
2. Click OK. The *Create Profile* screen appears.

Fransais English

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL

### Create Profile

You are about to create your PERT profile.  
Once you have completed your profile you will be able to report your practical experience.

#### General

<b>CPA Number</b>	4097293	<b>E-mail</b>	candytestapple@mailinator.com
<b>First Name</b>	Candy	<b>Business Phone</b>	
<b>Last Name</b>	Apple	<b>Home Phone</b>	(999) 999-9999
<b>Governing Body</b>	Alberta		

#### PER Program

**Experience Path \***

**Language Preference \***

**Mentor Email**

#### Declaration

I have read and agree to the student declaration here: [Student Declaration](#)

The information in the *General* section is populated by data stored in your provincial/regional body contact file. Review all fields in this section for accuracy. If you find any discrepancies, contact your provincial body immediately.

## Select Experience Route

The process to create your PERT profile is different depending on which experience route “Experience Verification” or “Pre-Approved Program” you are taking.

### Experience Verification

This flexible route allows future CPAs to demonstrate competence and have relevant experience recognized, as it is gained, at an employer of choice. Future CPAs complete detailed experience reports in PERT that are assessed by the profession at key milestones. Supervisors review and attest to the accuracy of experience reports

### Pre-Approved Program

Employers offering these types of programs have had them approved by the provincial professional body in advance. These programs have been designed to provide future CPAs all the required experience within 30 months.

For more information on the [two CPA Practical experience routes](#), please visit the CPA Canada website.

If you are working in a pre-approved program, please refer to the *PERT User Guide — CPA Students/Candidates Working in the Pre-approved Program Route (PPR)*.

### Unemployed

If you are registered with the profession, whether or not you have a mentor, setting up a PERT Profile is a very important step. For this reason, you may set up your profile as an “unemployed” student/candidate. “Unemployed” can be a temporary profile state for intermittent or temporary periods of unemployment. This state may be changed when you have employment at which time you will be employed either the experience verification or pre-approved program route. Co-op students who return to school are considered unemployed while in school. CPA students are required to report changes in their employment within 90 days as per Section 6.3 *Changes in Employment of CPA Harmonized Practical Experience Policies*.

**Note:** If you move into a status of *Unemployed* from being actively employed in either a pre-approved training position or an experience verification employment position, recognition of employment duration is put on hold during periods of unemployment, and your return to an employed state will necessitate a new confirmation of employment (PPR) or a new pre-assessment (EVR).



## PERT Profile: Adding a CPA Mentor

You can create a profile and even have your employment position pre-assessed without entering your CPA mentor's email address. However, your term of practical experience cannot be recognized until you have a CPA mentor in place. In other words, the "clock" (a student's/candidates PER Effective Date) which measures the required duration does not start until you have a mentor. Additional information on finding a mentor is available through your Provincial Practical Experience Administrators. Future CPAs are encouraged to identify their mentor within 90 days to avoid delays in recognizing their practical experience.

### Troubleshooting — Mentor

If you receive an error after you enter your CPA mentor information, such as "Mentor email not found", please contact your mentor to confirm that they have completed the application and you are entering the correct email address that your mentor used at time of registration.

Français English

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 ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL

### Create Profile ?

**You are about to create your PERT profile.**  
**Once you have completed your profile you will be able to report your practical experience.**

#### General

<b>CPA Number</b>	4097293	<b>E-mail</b>	candytestapple@mailinator.com
<b>First Name</b>	Candy	<b>Business Phone</b>	
<b>Last Name</b>	Apple	<b>Home Phone</b>	(999) 999-9999
<b>Governing Body</b>	Alberta		

#### PER Program

**Experience Path \***

**Language Preference \***

**Mentor Email**

#### Declaration

I have read and agree to the student declaration here: [Student Declaration](#)

Create
Cancel

- Read and "sign" the student declaration
- Click on "create" to save



# 3 Employment Verification Path

## PER Pre-Assessment

Once you have completed your PERT profile, you will be directed to the Experience Reports page:

Take a few minutes here to familiarize yourself with your PERT file. Even at this stage, you will see a lot of system-provided important information such as the **PER Status (see Appendix for PER Status definitions)**. If mentor is missing from your PERT profile then your PER effective date cannot be set and you will not be able to accumulate practical experience until a CPA mentor is identified on your PERT profile.

**PER Effective Date** is critical in the calculation of the required duration as it is the starting date for experience recognition.

A PERT pre-assessment is required for all future CPAs within the experience verification route before your period practical experience can be recognized. This pre-assessment is required in order for the provincial/regional body to assess whether your current position meets the entrance requirements

If you are not ready to continue immediately, be sure to check your emails as the same instructions will be provided through email.

## Welcome Email — for Experience Verification path

When you have successfully created your PERT Profile, you will also receive a “welcome email” with further instructions. These instructions mirror those presented in the PERT system.

Dear Student,

Thank you for completing your profile in PERT. You must now complete the pre-assessment process before any experience can be recognized.

The purpose of the pre-assessment is to validate whether you are in a relevant role that meets our entrance requirement of achieving at least one technical sub competency to a level one proficiency. No experience duration is granted during the pre-assessment stage. If you have not done so already, please follow these steps:

1. Log on to the PERT system
2. Create a new CURRENT experience report with your job start date as the report start date. Leave the end date blank.
3. Attach your current job description on company letterhead to this experience report. Include your employment start date for that current role on the job description (a hand-written date is acceptable).
4. Do not complete/update any of the technical or enabling competencies on this experience report.
5. Then under the Profession Assessment tab, request a pre-assessment.

Additional information on how to create an experience report for pre-assessments, please refer to the Quick Reference Guide for PERT tasks, located on the left hand side of the home screen in PERT.

This is an auto-generated message: “reply to” is not available. For any questions or concerns, please contact [practicalexperience@cpaontario.ca](mailto:practicalexperience@cpaontario.ca)

Sincerely,

PERT Administrator

## PERT Profile: Creating a Pre-Assessment

To prepare for the next step to prepare for the next step (pre-assessment), make sure you have access to the required documentation:

- Job description or Letter of Offer (on Letterhead) — should include confirmation of employment start date

If you are ready to take the next step — Click “Create New Report”.

At this stage, you will create “new” experience report, and enter the required data about your organization and your specific position.

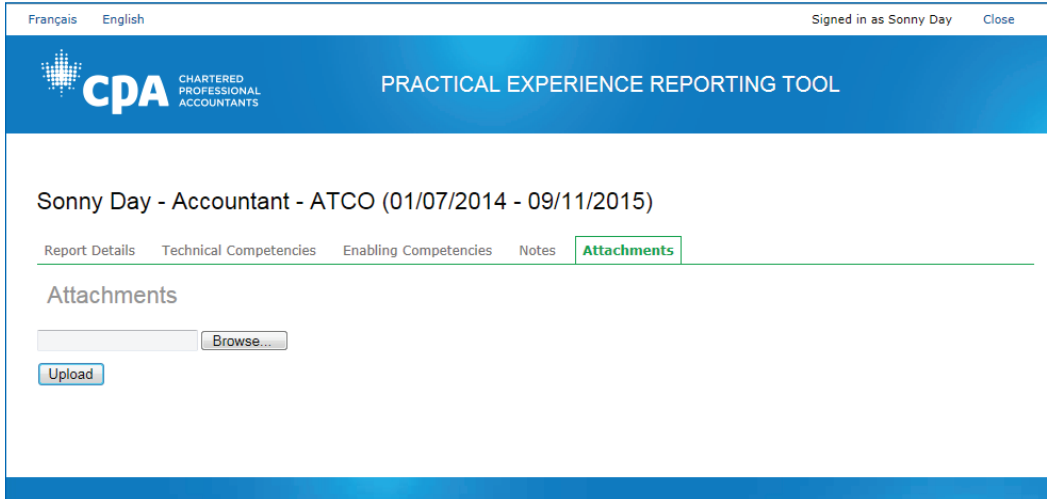
The **Start Date** is the date you started in the position you are submitting for pre-assessment. No duration is assessed during the pre-assessment stage, but the start date will help determine the PER Effective date. For this report only, your **End Date** can be entered as the same date as your start date.

**DO NOT** include any Technical or Enabling Competencies in this report: Pre-assessment is to determine relevancy of your position only, no assessment of competencies or duration is possible until your first recommended profession assessment. ***Entering any competency information in this report will delay the pre-assessment process as you will be required to remove it before the pre-assessment can be completed.***

Sonny Day - Accountant - ATCO (01/07/2014 - 09/11/2015)	
<a href="#">Report Details</a>	<a href="#">Technical Competencies</a> <a href="#">Enabling Competencies</a> <a href="#">Notes</a> <a href="#">Attachments</a>
<h3>Report Details</h3>	
<a href="#">Edit</a> <a href="#">Print</a> <a href="#">Delete</a>	
<h4>Status</h4>	
<b>Status:</b> New	<b>Calculated Duration:</b> 16.34 months
<b>Status Change Date:</b> 09/11/2015	<b>Duration Recognized:</b>
<h4>Position</h4>	
<b>Report Type:</b> Current Experience	<b>Experience Type:</b> Experience Verification
<b>Position Title:</b> Accountant	<b>Employer:</b> ATCO
<b>Training Position:</b>	<b>Months on Secondment:</b>
<b>Position Type:</b> Permanent	<b>Start Date:</b> 01/07/2014
<b>Avg Hrs/Wk:</b> 40.00	<b>End Date:</b> 09/11/2015
<b>Leave Taken (days):</b> 15	
<h4>Employer Address</h4>	
<b>Street Address:</b> 123	<b>Country:</b> Canada
<b>City:</b> Calgary	<b>Postal Code:</b> T2Y 4Z8
<b>Province:</b> Alberta	
<h4>Employer Profile</h4>	
<b>Primary Customers/Clients:</b> Internal	<b>Type of Industry:</b> Utility Public Private
<b># of Employees (Org):</b> 200	<b># of CPAs Employed:</b> 1 - 5
<b># of Employees (Dept):</b> 15	<b># of Staff Supervised by CPA Candidate:</b> 0
<h4>Supervisor Verification</h4>	
<b>Supervisor First Name:</b> test	<b>Supervisor Title:</b> accounting supervisor
<b>Supervisor Last Name:</b> supervisor	<b>Supervisor Phone Number:</b> 999 999-9999
<b>Supervisor Email:</b> chales@albertaaccountants.org	<b>Supervisor Language Preference:</b> English
<b>Supervisor Designation:</b> CGA	

## Required documents

Don't forget to attach the required documentation prior to saving your file.



The screenshot displays the CPA Practical Experience Reporting Tool interface. At the top, there are language options for 'Français' and 'English', and a user status indicator 'Signed in as Sonny Day' with a 'Close' link. The main header features the CPA logo (Chartered Professional Accountants) and the title 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below the header, the user's profile information is shown: 'Sonny Day - Accountant - ATCO (01/07/2014 - 09/11/2015)'. A navigation menu includes 'Report Details', 'Technical Competencies', 'Enabling Competencies', 'Notes', and 'Attachments', with 'Attachments' being the active tab. The 'Attachments' section contains a text input field, a 'Browse...' button, and an 'Upload' button.

CPA students/candidates should then save and close their experience report to return to PERT landing page so they can request a Pre-Assessment.

## Request a pre-assessment

Go to Profession Assessment tab to request a Pre-Assessment

Fransais English Signed in as Sonny Day Sign Out

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Experience Reports Consolidated Summary Mentor Reviews **Profession Assessments**

Profile  
Experience

### Profession Assessments

No Assessments

{ Request Pre-Assessment }

Now you can request a pre-assessment

Profile  
Experience

### Request Profession Assessment

General

**Assessment Type** Pre-Assessment

**Assessment Status** Assessment Requested

**Status Date** 17/11/2015

Candidate Declaration

The information in my experience reports is accurate

Create Cancel

When you have declared the accuracy of your report you will be able to create this request

Experience Reports Consolidated Summary Mentor Reviews **Profession Assessments**

Profile  
Experience

### Profession Assessments

Assessment Type	Assessment Status	Status Date	Comments
Pre-Assessment	Assessment Requested	17/11/2015	

Note the status of your pre-assessment

**To request a pre-assessment:**

- candidate's PER status must be "Pre-Assessment Required"
- candidate must have created a current experience report with report details section filled out
- previously requested pre-assessment, if any, must be completed or canceled

**To request a profession assessment:**

- candidate's PER status must be "In Progress"
- previously requested assessment, if any, must be completed or canceled
- at least one report must be in a verified or reviewed status





# 4 PERT Profile: Pre-Assessment Complete, PER Status “In Progress”

When your pre-assessment has been completed by the provincial/regional body, you will notice:

## Pre-Assessment Complete – Email Notification

**To:** sonnytestday

**From:** no-reply@cga-uat.org

**Subject:** Pre-Assessment Complete

**Received:** Tue Nov 17 15:37:31 MST 2015

Original Forward Delete

This email has been filtered to help protect you against malicious content. This may affect the email's appearance. If this email was sent by a trusted source, you can [Remove Safety Filter](#)

---

Dear Sonny,

Based on the information you've provided, we conclude that your current responsibilities meet our entrance requirement of achieving at least one technical sub competency to a level one proficiency. The duration of practical experience will only commence if you have an approved CPA mentor in your PERT profile. Once a CPA mentor is indicated in your profile, your practical experience effective date (PER Effective date) will be populated and you can then submit up to twelve (12) months of prior experience, if applicable. Prior experience is any experience accumulated prior to your PER effective date in PERT. You are encouraged to submit prior experience as early as possible.

You are required to [create an experience report semi-annually](#) and discuss these with your CPA mentor at least semi-annually.

For information on how to create an experience report including prior experience reports, or how to submit a profession assessment, please refer to the User Guides located within the home screen in PERT. See section called User guides – ongoing reports.

Additionally, changes to your current employment status (i.e. changing employers or job title changes within your current employer) must be reported to your provincial/regional body through a PERT experience report within 3 months of occurrence.

**{ Please log into PERT to see the date for your next required Profession Assessment. }** ←

This is an auto-generated message: "reply to" is not available. For any questions or concerns, please contact [PracticalExperience@cpaalberta.ca](mailto:PracticalExperience@cpaalberta.ca)

Sincerely,  
PERT Administrator

## Updated PERT Profile

Fransais English Signed in as Sonny Day Sign Out

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Experience Reports Consolidated Summary Mentor Reviews Profession Assessments

Profile Experience User Guide - Quick Reference User Guide - First Report User Guide - Ongoing Reports User Guide - Mentor, Assessments, Other

**Experience Reports**

{ PER Status In Progress }

**Mentor**

**Next Profession Assessment** 11/2016 **Next Mentor Review** 16/05/2016

**PER Effective Date**

Status	Date	Employer	Position	Report Period	Hrs/Wk	Report Type	Leave Taken	Duration Recognized (in months)
Reviewed	17/11/2015	ATCO	Accountant	01/07/2014 to 09/11/2015	40.00	Current Experience	15	0.00

Have you specified a mentor in your profile?

There is a lot of new information here your PER — Status (see Appendix B for PER Status definitions) has changed, your review dates have been established, and you definitely need a mentor if you have not yet done so. Note the PER Effective date which will remain blank until a mentor has been identified.

CPA students/candidates should review the reviewer’s comments, under the Profession Assessment tab.

When your pre-assessment has been completed, it is important to make sure you have a mentor in place so you can begin to report your competency development and receive feedback from your mentor about your progress.

The profession recommends that you discuss the process with your Supervisor prior to creating the next experience report as all experience reports will need to be verified by your supervisor through PERT before you can request a mentor review. All experience reports must be in a verified status to request a mentor review.

# 5 Next Steps

The results of your pre-assessment determine your profession assessment schedule. All students/candidates following the experience verification route are required to submit an assessment at 12 months. Do not, however, wait a year to begin documenting your developing competencies through the experience reporting system. After your pre-assessment is complete, you will need to create a new report and update the information at minimum every six months. You also need to be meeting with your mentor at least twice per year to discuss your developing enabling competencies. See [CPA Reporting Requirements fact sheet](#). Student/candidates are encouraged to use the QUICK Reference Guide for PERT Tasks that is stored directly in PERT along the left hand side of the PERT landing page.



# 6 Best tips

1. Keep your email address current and always check for mail from the PERT system. Emails auto-generated by the system often have instructions for you to follow.
2. Remember, PERT is for reporting and assessment of your work experience. Explore the Consolidated Summary to track your own progress, however please keep in mind that final approval of your practical experience is based on the assessment of Reviewed experience reports only.
3. Regularly access the information available at CPA Practical Experience Student Resource Centre to become familiar with all stages of the process.



# Appendix A: Experience Reports — Experience Verification — summary

Event	Experience Report Submitted	Primary Purpose
Immediately or with 90 days of enrolling in the program	New report — Request Pre-Assessment)	Assessed by provincial/ regional body
12 months after your PER Effective date	Complete experience report and submit to supervisor for Verification. Once report in Verified status, then request a profession assessment	Assessed by provincial/ regional body
Completion of experience	Complete experience report and submit to supervisor for Verification. Once report in Verified status, then request a profession assessment	Assessed by provincial/ regional body
New job or new employer	Complete experience report and submit to supervisor for Verification. Once reports in Verified status, then request a profession assessment for Change of Job Assessment	Assessed by provincial/ regional body
Other	Optional; may be subject to a fee	Assessed by provincial/ regional body





# Appendix B: PER Status Defined

**Pending Enrolment** — A future CPA that has updated their PERT profile to indicate experience path of pre-approved program. Student/candidate is awaiting employment confirmation.

**Pre-Assessment Required** — A future CPA that has updated their PERT profile to indicate experience path of Experience Verification. Student/candidate must submit pre-assessment to have role assessed by profession

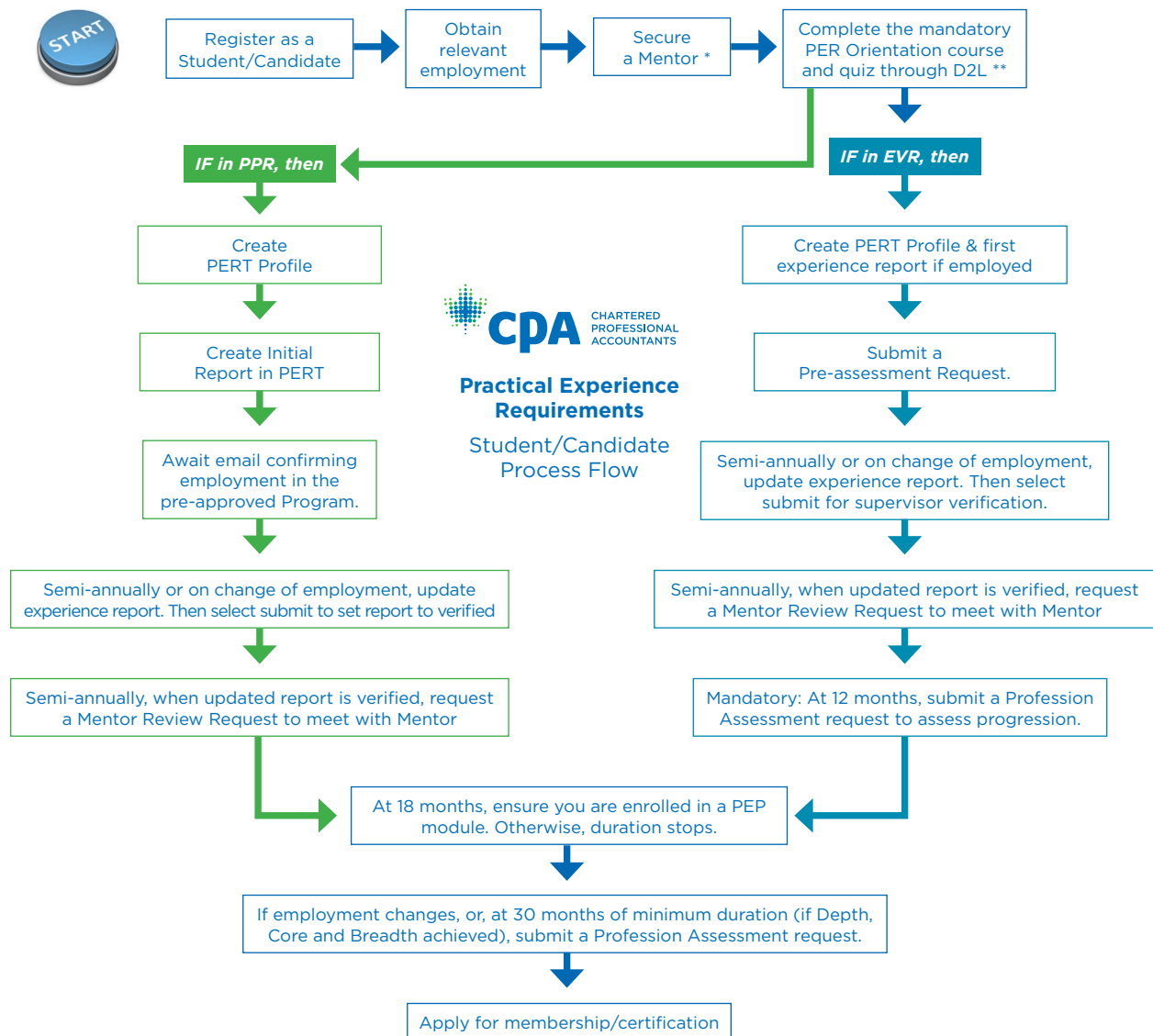
**In Progress** — Once employment is confirmed or job description is approved, then student is now in progress and able to accumulate practical experience. A student/candidate's time will only begin once their PER Effective date has been set.

**Unemployed** — A future CPA who is no longer employed and does not have a current role in progress.

**PER Standard Met** — A future CPA who has met all the CPA practical experience requirements.



# Appendix C: PER Process Flow Chart



\* In the pre-approved program route (PPR), your employer will match you with a CPA mentor. In the experience verification route, you are required to secure your own CPA mentor.

\*\* If you are registered with CPA Ontario, you are not required to complete the PER Orientation course and quiz.



# Appendix D: CPA Practical Experience Requirements (PER) Effective Date

## FREQUENTLY ASKED QUESTIONS

### **What is the PER Effective Date?**

The Practical Experience Requirements (PER) Effective date is the date that practical experience will begin to accumulate towards your total practical experience duration.

### **Why is the PER Effective Date significant to CPA students/candidates?**

Any experience accumulated after the PER Effective date is considered CURRENT experience and is reported through current experience reports. Any experience accumulated prior to the PER effective date is considered prior experience and is reported in either a prior pre-approved program (Prior PPR) or a prior experience verification (Prior EV) experience report within PERT. All CPA students/candidates are eligible to claim up to 12 months of prior experience that they have accumulated in the last 5.5 years that they have accumulated prior PER effective date.

### **How is the PER Effective Date calculated?**

The PER Effective Date is calculated based on the later of your job start date or your CPA registration date (if within the last 90 days), and whether there you identified your CPA mentor in your PERT profile at the time your employment was confirmed. You may have your PER Effective Date calculated up to 90 days prior based on whether your job start date or CPA registration date occurred within the last 90 days, and **if and only if** you identified your CPA mentor in your PERT profile at the time your employment is confirmed. This is why it is important that you identify your CPA mentor as early as possible and **before** employment is confirmed.

**How is employment confirmed?**

If you are in the Experience Verification route (EVR), employment is confirmed via PERT when your provincial/regional body reviews and approves the role submitted via a pre-assessment. If you are in a pre-approved program route (PPR), employment is confirmed when your Program Manager confirms your employment in PERT.

**If I am a PPR student/candidate, how does my Program Manager know when to confirm employment?**

When you update your PERT profile to indicate employment at a specific organization, location, and program, an automatic notification requesting confirmation of your employment is sent to your program manager. It is imperative that you create an experience report once you start employment in order to capture your job start date, otherwise employment cannot be confirmed. Additionally, you will need to identify your CPA mentor in your PERT profile as this is required for your program manager to confirm employment.

**Once the PER Effective date is set, does it change?**

No, once set, the PER Effective Date will remain in your PERT profile until you qualify for CPA membership or deregisters.

For assistance, please send inquiries to your respective provincial/regional body.





**CPA**

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