



# PERT User Guide

*CPA Students/Candidates Working in  
the Pre-approved Program Route (PPR)*

Effective January 1, 2018

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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 login 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.

Setting up PERT Profile - Review General Information

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, please contact your provincial body immediately.

Français English


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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

## 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 Route

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 Route

Employers offering these types of programs have had them approved by the provincial professional body in advance. These programs have been designed to provide all 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.



## Unemployed as a temporary “path”

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/candidates 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*.

Franglais English Signed in as Sal Utation Sign Out

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

### Edit Profile

#### General

<b>CPA Number</b>	4039239	<b>E-mail</b>	saltestutation@mailinator.com
<b>First Name</b>	Sal	<b>Business Phone</b>	
<b>Last Name</b>	Utation	<b>Home Phone</b>	(999) 999-9999
<b>Governing Body</b>	Alberta		

#### PER Program

<b>Experience Path</b>	Experience Verification
<b>Language Preference</b>	Select...
<b>Mentor Email</b>	Experience Verification
	Pre-approved Program
	Unemployed

Save Cancel

**Note:** remember if you move into a status of *Unemployment* 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).



# 3 PERT Profile — Pre-Approved Program Route (PPR)

Employers offering Pre-Approved Programs (PPR) have had them approved by the provincial professional body in advance. The programs have been designed to provide future CPAs all the required experience within 30 months and the areas of core, depth, and breadth have been pre-defined. Future CPAs following the Pre-Approved Program route only need to request a profession assessment either (1) when the future CPA completes the 30 month qualifying period or (2) when the future CPA departs the pre-approved program before completing the qualifying term (i.e change of job, co-op students etc).

## PERT Profile: Initial Creation

Under Experience Path — Select Pre-Approved Program

Future CPAs employed in Pre-Approved Programs, must indicate the following on their PERT Profile:

1. Select Organization from drop down list
2. Select location from drop down list
3. Select program from drop down list
4. Input their mentor email address \*\*

### Edit Profile

**General**

<b>CPA Number</b>	4079652	<b>E-mail</b>	perttest34@mailinator.com
<b>First Name</b>	Pert	<b>Business Phone</b>	(403)407-9652
<b>Last Name</b>	Smith	<b>Home Phone</b>	(403) 407-9652
<b>Governing Body</b>	Ontario		

**PER Program**

<b>Experience Path *</b>	Pre-approved Program ▼
<b>Language Preference *</b>	English ▼
<b>Organization *</b>	<input type="text"/>
<b>Location *</b>	Select... ▼
<b>Program *</b>	Select... ▼
<b>Mentor Email</b>	<input type="text"/>

\*\*As a future CPA employed in a Pre-approved Program, it is the responsibility of the Pre-approved Program employer to provide you with an approved CPA mentor. If you are unsure of who your rCPA mentor is, you should contact your employer to be provided with one.

## PERT Profile: Adding a CPA Mentor

Future CPAs can create a profile 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. Future CPAs are encouraged to identify their mentor within 90 days to avoid delays in recognizing their practical experience.

### Troubleshooting — Mentor

- If the organization/location/program is not available please contact your provincial professional body for assistance
- If you receive an error after inputting your CPA mentor's email address into your profile, it could be due to the following:
  - Error 1 - Mentor email not found → please contact your mentor to confirm that have completed the application and that you are entering the correct email address that they registered with
  - Error 2 - Mentor does not belong to selected Organization - PPR students are required to have mentors from the pre-approved program. Verify with your mentor that on their application they checked off that they were part of a PPR and that the mentor has identified the same Organization as on your PERT profile.

**Edit Profile**

**General**

<b>CPA Number</b>	4079652	<b>E-mail</b>	perttest34@mailinator.com
<b>First Name</b>	Pert	<b>Business Phone</b>	(403)407-9652
<b>Last Name</b>	Smith	<b>Home Phone</b>	(403) 407-9652
<b>Governing Body</b>	Ontario		

**PER Program**

<b>Experience Path *</b>	Pre-approved Program ▼
<b>Language Preference *</b>	English ▼
<b>Organization *</b>	<input type="text"/>
<b>Location *</b>	Select... ▼
<b>Program *</b>	Select... ▼
<b>Mentor Email</b>	<input type="text"/>

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

## PERT Profile: Creating an initial Experience report

Once you have completed your PERT profile, you will be directed to this page:

The screenshot displays the 'Practical Experience Reporting Tool' interface. At the top, there are language options (Français, English) and user information (Signed in as Pert Smith, Sign Out). The CPA logo and 'CHARTERED PROFESSIONAL ACCOUNTANTS' are on the left. The main title is 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below this, there are navigation tabs: 'Experience Reports' (selected), 'Consolidated Summary', 'Mentor Reviews', and 'Profession Assessments'. On the left, a sidebar menu includes 'Profile', 'Experience', 'User Guide - First Report', 'User Guide - Ongoing Reports', and 'User Guide - Mentor, Assessments, Other'. The main content area is titled 'Experience Reports' and shows the following information:

- PER Status:** Pending Enrollment
- Mentor:** Erin McDonald
- Next Profession Assessment:** 11/2016
- Next Mentor Review:** 25/04/2016
- PER Effective Date:** 02/11/2015
- Program:** Rotational

Below this information is a table with the following data:

Status	Date	Employer	Position	Report Period	Hrs/Wk	Report Type	Leave Taken	Duration Recognized (in months)
Reviewed	02/11/2015	McDonald Corp	Accountant	05/10/2015 to Present	40.00	Current Experience	0	

Below the table, there is a 'Create New Report' link and a message: 'You must create an experience report right away in order for your employer to verify the date you started in their Pre-approved Program and position type. Your CPA PER status cannot be set to 'In Progress' until this occurs.'

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 the CPA mentor information is missing from your PERT profile then your PER effective date can not 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.

As a student in a pre-approved program, you must create an Experience report **immediately** that includes your job start date. Without an experience report containing your job start date, your employment can not be confirmed and you can not be set to "In progress".

Click "Create New Report"

The screenshot shows the 'Create Experience Report' form within the CPA Practical Experience Reporting Tool. The interface includes a header with language options (Français, English), user information (Signed in as Pert Smith, Sign Out), and the CPA logo. The form fields are as follows:

- Report Type \***: Select...
- Training Position \***: Select...
- Position Title \***: Text input field.
- Secondment? \***: Radio buttons for Yes and No (No is selected).
- Position Type \***: Select...
- Avg Hrs/Wk \***: Text input field with a help icon.
- Start Date \***: Date picker with a help icon.
- End Date \*\***: Date picker with a help icon.
- Leave Taken (days) \*\***: Text input field.

At the bottom of the form are 'Create' and 'Cancel' buttons.

Select Current Report, select NO for secondment, and update the following:

- Training position from drop down
- Type your position title
- Select position type from drop down menu
- Indicate avg hours per week
- Update Start Date \*\*please input the date that paid employment began for this position
- End date can be left blank for now, unless contract or co-op and end date is known then enter end date
- Leave Taken – please leave blank for now

Once you have created your PERT profile and created a current experience report there is no further action required until your program manager confirms employment in the pre-approved program. By creating your PERT profile and indicating a pre-approved program, an automatically generated email has been sent to the program manager to log onto PERT and complete the employment confirmation process.

Once the program manager confirms your employment, you would be notified by a system generated email, copy is included for reference. Email will come from PERT Administrator with email address of: [no-reply@cpa-services.org](mailto:no-reply@cpa-services.org).

## Employment Confirmed in your Pre-approved Program — Email Notification

Dear {StudentName},

We have confirmed your employment with the Pre-approved Program indicated in your PERT student profile, and your CPA PER status has now been changed to 'In Progress'.

As a student/candidate in a Pre-approved Program, **a CPA Mentor must be assigned to you**. If you have not been assigned a CPA Mentor, you must follow-up with your employer as soon as possible. Once you have a CPA Mentor, you will need to update your PERT profile to include the email address your CPA Mentor used when registering with their CPA provincial/regional body. Until this occurs, you may be subject to a monetary or duration penalty from your provincial/regional body.

In PERT, you are required to create an experience report, update it at least semi-annually, and discuss it with your CPA Mentor. If you are in a rotational-based program, an experience report must be created for each rotation. For information on how to create an experience report, including claiming any prior experience or submitting a profession assessment, please refer to the user manuals available within PERT.

Additionally, changes to your employment status (e.g., changing employers, switching to another Pre-approved Program or to the Experience Verification Route, or leaving your place of employment) need to be reported through a PERT experience report within three months of occurrence.

Sincerely,


PERT Administrator



# 4 PERT Profile: Employment Confirmed “In Progress”

Once your employment is confirmed by the program manager your PER Status will change from Pending Enrolment to In Progress. If you had identified a mentor when creating your PERT profile, then your Practical Experience Requirements (PER) Effective Date will be populated.

Français English
Signed in as Pert Smith Sign Out


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PRACTICAL EXPERIENCE REPORTING TOOL

### Create Experience Report

**Position**

**Report Type \***

**Training Position \***

**Position Title \***

**Secondment? \***  Yes  No

**Position Type \***

**Avg Hrs/Wk \***  ?

**Start Date \***   ?

**End Date \*\***   ?

**Leave Taken (days) \*\***



# 5 Next Steps

CPA students/candidates are required to log onto PERT on a semi-annual basis and self-assess their proficiency development by updating their experience reports for technical and enabling competency development achieved during the period. For information on reporting requirements for CPA students/candidates, please see [CPA Practical Experience Reporting Requirements factsheet](#). Students 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: 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/candidate is now in progress and able to accumulate practical experience. A student/candidate time will only begin once their PER Effective date has been set.

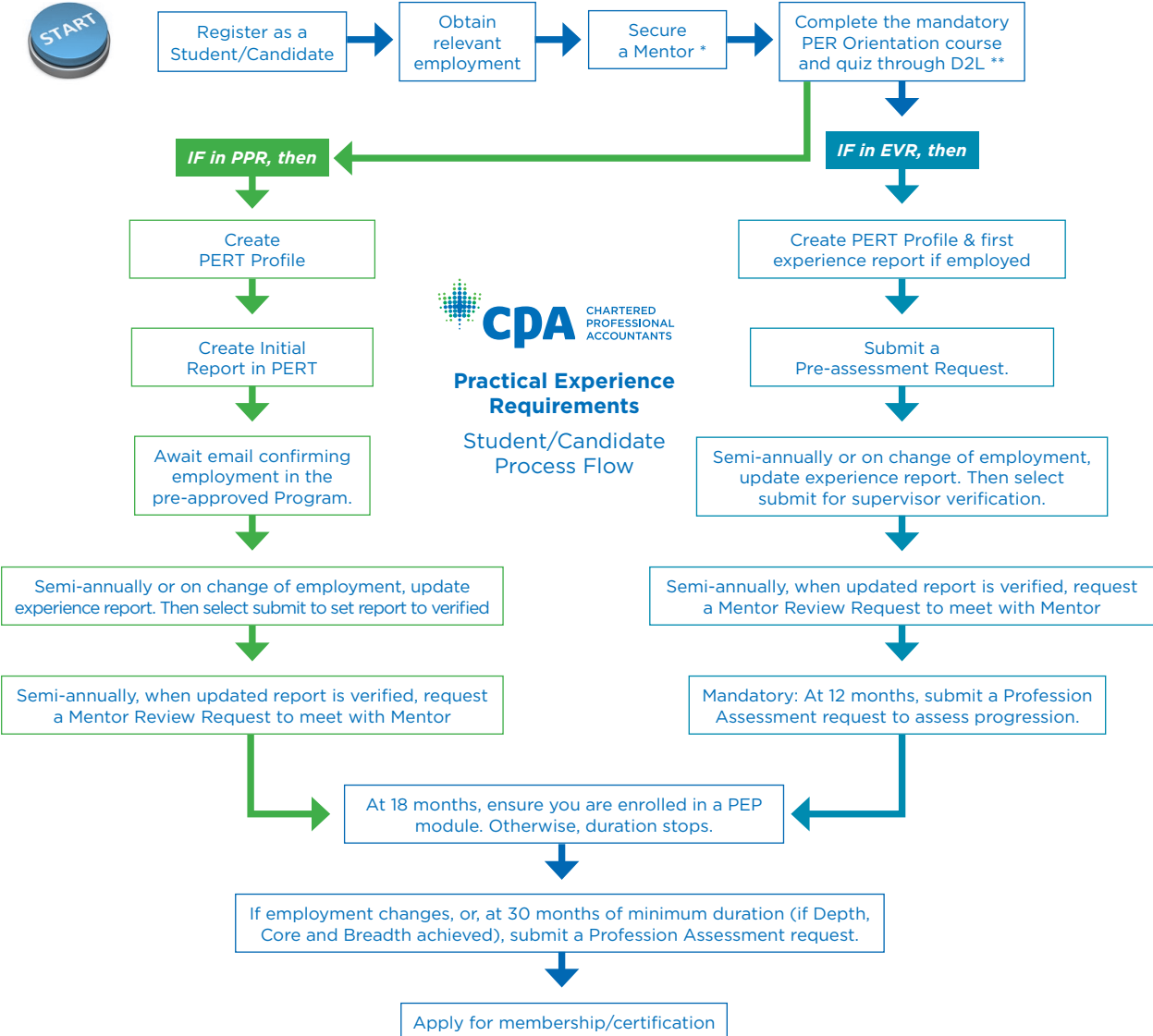
**Unemployed** — A future CPA who is no longer employed and does not have a current role in progress.

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





# Appendix B: 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 C: 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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