

COMPLETING YOUR PROFESSIONAL EXPERIENCE REQUIRED FOR CERTIFICATION (PERC) SUBMISSION ONLINE

INSTRUCTIONS FOR STUDENTS

1. Logon to your account at cpaontario.ca.
2. A link will be located on your “My Account” home page, under the box containing your personal information. Students accessing the PERC for the first time will be prompted to create a student profile.
3. Once you have completed your student profile, select “Create.”
4. You will then be directed to create an employment file.
5. Select “Create New” to create an employment file and the new employment file form will appear.
6. Fill in the required fields on the new employment file form:

* Required fields are indicated by a red asterisk. Students must fill out the required fields in order to complete and save the new employment file form.

** The fields you are required to complete before you submit your file for verification are indicated by two green asterisks; you may continue the new employment form without filling in these fields. However, you must complete these fields before submitting your employment file form for verification.

If you are entering a position in which you are currently employed, indicate the date you submit your PERC for review as your position end date.

If you are submitting an employment file that has been previously assessed, you must indicate this by using the drop down menu in the “Employment Detail” section.

7. **Students must input their supervisor’s and verifier’s contact information where required in the employment file. Please indicate corporate email addresses when entering supervisor/verifier contact information.**

Note: If your supervisor has an acceptable professional accounting designation, they can be your supervisor and your verifier. If your supervisor is your verifier, please indicate this on your PERC submission by checking the “Supervisor is the same as Verifier” box on your employment file.

8. Select “create” at the bottom of the screen to complete your employment file.
9. Once you complete your student profile, you will be directed back to the employment file screen. Select the employment file you wish to update.

10. Your employment file will have five tabs across the top:

File details:

All the information entered when creating the employment file will be transferred to this tab. Here students can review their employment details before moving onto the questionnaire tab.

Questionnaire:

In this tab, you must answer questions related to the three competencies and subject areas.

Attestation:

This tab is for your supervisor's review only.

Notes:

In this tab, students, supervisors, verifiers and the Association reviewers are able to add notes and review the notes of others. Once posted, notes cannot be edited or deleted.

Attachments:

In this tab, you can add documents you wish to include in your employment file; such as letters of reference, your resumé, job description(s), project reports, etc. Excel, PDF and Word documents are accepted. If the documents you upload are from your employer, be sure you have permission to upload them prior to doing so. Please attach your resumé in this section.

11. Enter the questionnaire tab. Select a subject area and fill out its respective questionnaire. Students must complete all three rows on the questionnaire:

- Use the checkbox to select “yes” or “no”. If you do not have work related experience to fulfil an example, leave it blank and move on.
- Personal Experience Description: students must describe how the tasks they complete at work demonstrate this example.
- Frequency Activities Performed: Use the drop down tab to select the option that best describes how frequently you perform this task at work:
 - *Seldom (1-3 times per year)*
 - *Frequently (more than 5 times per year)*
 - *Occasionally (4-5 times per year)*
 - *Continuously (something you do all the time)*

Save your responses at the bottom of each page. Saving will bring you back to the home page of the questionnaire. To continue the questionnaire, select the next subject area.

12. Go to the “attachments” tab and upload your resumé or other documentation to support the employment file you just created.

13. Go back to the “File Details” screen.

14. Print a copy of your PERC submission for your records.

15. Once you have completed the above steps, select “Submit,” located at the top of the screen. Once you have submitted your file, the file's status will change to “supervisor assess,” and you will no longer be able to access or edit your file.

16. Your supervisor will be sent a link to your PERC submission with the email address you provided in step eight, for their review and confirmation.

Note: If you are submitting an employment file with the same employer and position for a new review, select “copy” in the “file details” tab and all the information will be copied into a new employment file.

17. You will receive an email when your verifier has approved your submission.

18. CPA Ontario will notify you when you have successfully completed the PERC requirements.