



Experience Verification (EVR)

Getting Started in PERT

Effective April 1, 2018

| CPA provincial/ regional bodies | CPA Practical Experience Requirements contact information |
|---|--|
| CPA Alberta | Email: practicalexperience@cpaalberta.ca Phone: 403.269.5341 |
| CPA Atlantic Region | Email: practicalexperience@cpaatlantic.ca Phone: 902.429.4494 |
| CPA British Columbia | Email: <ul style="list-style-type: none"> • PER/PERT inquiries: cpabcper@bccpa.ca • Mentor inquiries: Mentor@bccpa.ca Phone: 604.872.7222 |
| CPA Canada – International | Email: internationalinquiries@cpacanada.ca |
| CPA Manitoba | Email: practicalexperience@cpamb.ca Phone: 204.943.1538 |
| CPA Ontario | Email: practicalexperience@cpaontario.ca Phone: 416.962.1841 or 1.800.387.0735 Mentor inquiries: mentor@cpaontario.ca |
| Ordre des comptables professionnels agréés du Québec | Email : Stages@cpaquebec.ca Phone: 1.800.363.4688 [2615] |
| CPA Saskatchewan | Email: practicalexperience@cpask.ca Phone: 306.359.0272 |
| CPA Canada Toronto Head Office | Email: member.services@cpacanada.ca Phone: 416.977.0748 or 1.800.268.3793 |

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1 Introduction

Qualifying Practical Experience

In addition to formal education and successful completion of the Common Final Examination, the 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 the Practical Experience Reporting Tool (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](#).

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 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 webinar¹ in Brightspace (D2L), the profession's online learning platform.

Practical Experience Orientation Webinar¹

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.

¹ 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.

Students/candidates from Ontario:

1. Go to the [CPA Ontario](#) website
2. Use your CPA ID and password to access PERT

Students/candidates from Western Canada (BC, AB, SK and MB):

1. Go to the [CPA Western School of Business](#) website
2. Enter your email address and password to access PERT

The information in the *General* section is populated by data stored in your provincial/regional body contact file.


Students/candidates in the Atlantic region or international students/candidates:

1. Go to [PERT](#)
2. Click **Create profile**
3. Fill in the required fields

Students/candidates in the Atlantic region or international students/candidates will need to input this information

Review all fields in this section for accuracy. If you find any discrepancies, contact your provincial body immediately.

Français English


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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

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

PER Program

Experience Path *

Language Preference *

Mentor Email

Declaration

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

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 (EVR)

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 (PPR)

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 *PPR — Getting Started in PERT*.

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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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

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

PER Program

Experience Path *

Language Preference *

Mentor Email

Declaration

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

Finally, to save your profile:

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

3 Employment Verification Path

PERT 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 (see Appendix D) 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 PERT.

Dear [first name],

Thank you for creating your PERT profile. You must now request a Pre-Assessment before any experience can be recognized.

The purpose of the Experience Verification Route (EVR) Pre-Assessment is to confirm you are in a relevant role that meets the entrance requirements for achieving at least one technical sub-competency to a level one proficiency. No duration will be recognized for your Pre-Assessment Experience Report.

You must have an approved CPA Mentor added to your PERT profile in order for qualifying experience to begin. Until you identify a CPA Mentor, your PER Effective Date will not be set.

To request a Pre-Assessment, follow these steps:

1. Access PERT
2. In Experience Reports, click **Create New Report**
3. Complete the report details (End Date and Leave Taken can be left blank)
4. Click **Create**
5. Once you have created the Experience Report, click **Employer** or **Position** to open the report
6. Click **Attachments** and upload your current job description, which must be on company letterhead
7. Do not complete the Technical or Enabling Competency fields
8. Close the Experience Report by clicking the **X**
9. In your PERT home page, in Profession Assessments, click **Request Pre-Assessment**

For additional information on how to create an experience report for Pre-Assessments, refer to the User Guide – Quick Reference, located on the left side of your PERT home page.

This is an auto-generated message. “Reply to” is not available. For any questions or concerns, please contact your provincial/regional CPA body.

Sincerely,

PERT Administrator

PERT Profile: Creating a Pre-Assessment

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

- Job description — 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 in the report details section of the experience report.

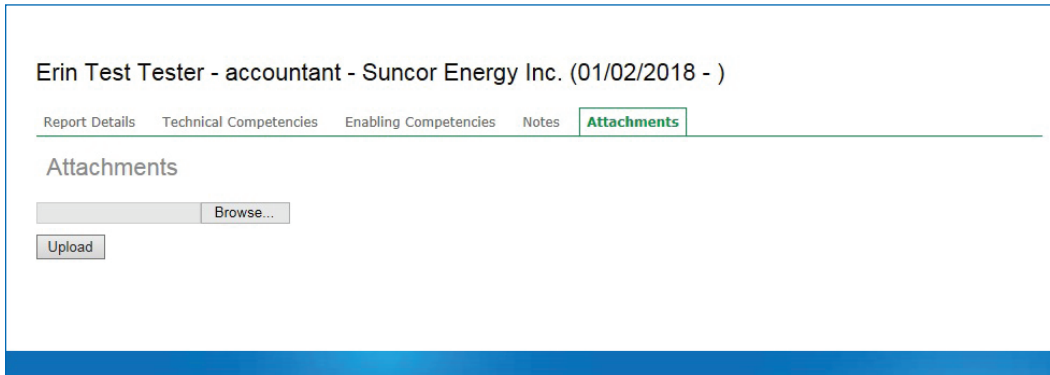
The **Start Date** is the date you started in the position you are submitting for pre-assessment. No duration is assessed during the pre-assessment stage, but the start date will help determine the PER Effective date. For this report only, your **End Date** can be entered as the same date as your start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

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

Required documents

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



The screenshot shows a web interface for an experience report. At the top, the title is "Erin Test Tester - accountant - Suncor Energy Inc. (01/02/2018 -)". Below the title is a navigation bar with tabs: "Report Details", "Technical Competencies", "Enabling Competencies", "Notes", and "Attachments". The "Attachments" tab is selected and highlighted in green. Below the navigation bar, the heading "Attachments" is displayed. Underneath, there is a text input field with a "Browse..." button to its right. Below the input field is 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 section to request a Pre-Assessment.

The screenshot shows the top navigation bar with 'Français English' on the left and 'Signed in as Sonny Day Sign Out' on the right. Below this is a blue header with the CPA logo and 'PRACTICAL EXPERIENCE REPORTING TOOL'. A menu bar contains 'Experience Reports', 'Consolidated Summary', 'Mentor Reviews', and 'Profession Assessments'. The main content area is titled 'Profession Assessments' and shows 'No Assessments' with a '{ Request Pre-Assessment }' button. A green arrow points from a green callout box on the right to this button. The callout box contains the text: 'Now you can request a pre-assessment'.

The screenshot shows the 'Request Profession Assessment' form. On the left is a sidebar menu with 'Profile', 'Experience', 'User Guide - First Report', 'User Guide - Ongoing Reports', and 'User Guide - Mentor, Assessments, Other'. The main form has a 'General' section with the following details: 'Assessment Type: Pre-Assessment', 'Assessment Status: Assessment Requested', and 'Status Date: 17/11/2015'. Below this is a 'Candidate Declaration' section with a checked checkbox and the text 'The information in my experience reports is accurate'. A green arrow points from a green callout box on the right to this checkbox. The callout box contains the text: 'When you have declared the accuracy of your report you will be able to create this request'. At the bottom of the form are 'Create' and 'Cancel' buttons.

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

Dear [first name],

Your Pre-Assessment has been approved with your current role meeting the entrance requirements of at least one technical sub-competency to a level one proficiency.

IMPORTANT NOTES:

- You must identify an approved CPA Mentor in your PERT profile (if you have not already done so) in order for qualifying experience to begin. Until you identify a CPA Mentor, your PER Effective Date will not be set.
- Once your PER Effective Date is set, you will be able to create a Current Experience report for your current role and create any Prior Experience reports needed for experience gained prior to your PER Effective Date. You are encouraged to submit prior experience as early as possible to avoid any delays when submitting your completion assessment. Students/candidates can obtain up to 12 months of prior experience.
- You are required to create/update your Current Experience report and have a Mentor Review semi-annually. Refer to your Next Mentor Review date as a time guide.
- You are required to Request Assessment on your Next Profession Assessment date, or if there are changes to your current employment status (e.g. ending employment or changing roles within your current employer).

For additional information on how to create an experience report, refer to the User Guide – Quick Reference, located on the left side of your PERT home page.

Continued...

This is an auto-generated message. “Reply to” is not available. For any questions or concerns, please contact your provincial/regional CPA body.

Sincerely,

PERT Administrator

Updated PERT Profile

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

Profile **User CPATest11**

Mentor Search

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

User Guide - Quick Reference

User Guide - EVR

User Guide - PPR

Help

Experience Reports

{ PER Status In Progress }

Mentor

Next Profession Assessment 11/02/2019

Next Mentor Review

PER Effective Date

| Status | Date | Employer | Position | Report Period | Hrs/Wk | Report Type | Leave Taken | Duration Recognized (in months) |
|----------|------------|----------|------------|-----------------------|--------|--------------------|-------------|---------------------------------|
| Reviewed | 26/03/2018 | Bell | Accountant | 08/01/2018 to Present | 35.00 | Current Experience | | 0.00 |

Create New Report

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 a profession assessment at 12 months. Do not, however, wait a year to begin documenting your developing competencies through the experience reporting system. 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. 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 PERT. 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 on the [CPA Certification Resource Centre – Resources for CPA Practical Experience Requirements](#) to become familiar with all stages of the process.

Appendix A: Experience Reports — Experience Verification — summary

| Event | Experience Report Submitted | Primary Purpose |
|---|--|---|
| Immediately or within 90 days of enrolling in the program | New report — Request Pre-Assessment) | Assessed by provincial/ regional to determine if future CPA is in qualifying role |
| 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 |
| | 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.

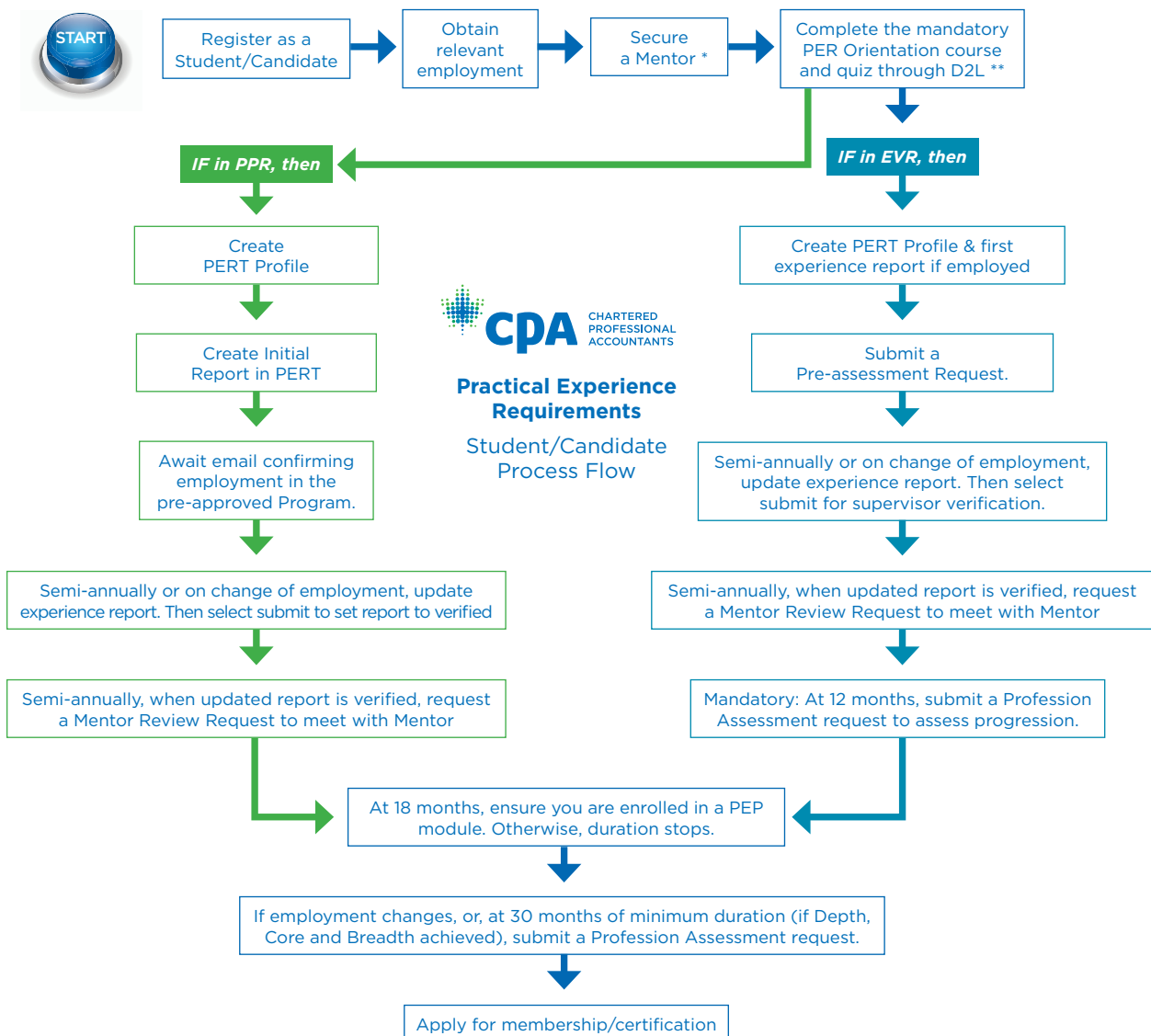
Pre-Assessment Required — A future CPA that has updated their PERT profile to indicate experience path of Experience Verification. Student/candidate must submit pre-assessment to have role assessed by profession

In Progress — Once employment is confirmed or job description is approved, the future CPA is now in progress and able to accumulate practical experience. The future CPA'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.



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