PRACTICAL EXPERIENCE REQUIREMENTS: CHANGE OF JOB

Are you completing your practical experience requirements and have had a change in employment? If so, learn about the required Profession Assessment to ensure your reporting is up to date.

Within 90 days of your employment change date, you must request a Profession Assessment for Change of Job. After 90 days, you may be at risk of cancellation of your practical experience reports and loss of duration.

When to Request a Change of Job Profession Assessment

- You are terminating employment with your current employer

- You are changing roles at your current employer (i.e. Financial Analyst to Internal Auditor)

- You are changing office locations within a Pre-Approved Program

- You are a co-op student going back to school

Do Not Request an Assessment if:

- You are promoted within your role at the same employer (i.e. Analyst to Senior Analyst)

- You are a co-op student going back to school and your Program Leader has instructed you to stay on their roster as you will be returning to the same Pre-Approved Program

Assessment Instructions

In the Practical Experience Reporting Tool (PERT), follow the applicable steps below based on your current employment path.

Experience Verification Route (EVR)

- Starting a New Job in EVR

- Leaving a Job in EVR and Have Not Started a New Job

- Leaving a Job in EVR for a Job in PPR

Pre-approved Program Route (PPR)

- Starting a New Job in PPR

- Leaving a Job in PPR for a Job in EVR

- Leaving a Job in PPR and Have Not Started a New Job

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EXPERIENCE VERIFICATION ROUTE (EVR)

Starting a New Job in EVR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report. Experience that falls on and after your PER Effective Date needs to be documented in a Current Experience Report.

2. Select Submit in the report details tab to set the report status to Verification Requested, at which point your report will be sent to your supervisor.

3. Upon supervisor verification, your report status will be set to Verified.

4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.

5. Create an initial experience report for your new job, including your job start date. The report status should be left as New and no competencies should be filled out. Attach your job description on company letterhead – ensure it is signed by your manager or HR and saved in PDF format.

6. In the Profession Assessment tab, select Request Assessment.

7. Select Change of Job Assessment from the drop-down menu.

8. Complete the Candidate Declaration and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies for your previous role will be recognized, if eligible. CPA Ontario will have reviewed your new job description, and if approved for reporting, your PER status will remain In Progress. In this case, you do not need to submit a pre-assessment for your new role.

Leaving a Job in EVR and Have Not Started a New Job

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report. Experience that falls on or after your PER Effective Date needs to be documented in a Current Experience Report.

2. Select Submit in the report details tab to set the report status to Verification Requested, at which point it will be sent to your supervisor.

3. Upon supervisor verification, your report status will be set to Verified.

4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.

5. In the Profession Assessment tab, select Request Assessment.

6. Select Change of Job Assessment from the drop-down menu.

7. Complete the Candidate Declaration and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies will be recognized, if eligible. Your PER status and experience path will now be set to Unemployed and can be updated when you become employed again.

Leaving a Job in EVR for a Job in PPR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period for the position you had your pre-assessment on. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report. Experience that falls on or after your PER Effective Date needs to be documented in a Current Experience Report.

2. Select Submit in the report details tab to set the report to status Verification Requested, at which point it will be sent to your supervisor.

3. Upon supervisor verification, your report status will be set to Verified.

4. Ensure your mentor reviews are documented accurately. Students require at least two mentor reviews for every twelve months of current experience.

5. In the Profession Assessment tab, select Request Assessment.

6. Select Change of Job Assessment from the drop-down menu.

7. Complete the Candidate Declaration and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies will be recognized, if eligible. Your PER status and experience path will be set to Unemployed. Next, complete the below steps to become part of your new Pre-Approved Program roster:

1. On your profile page, update your Experience Path from Unemployed to Pre-Approved Program.

2. When you select the Pre-Approved Program experience path, you will be required to indicate the following fields:
   a. Organization
   b. Location
   c. Program

3. Update your mentor's email address from your PPR. If you are unsure, ask your Program Manager to confirm who your assigned mentor is.

4. When you are finished, save your changes.

5. You will be directed to the PERT homepage. Select Create New Report.

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6. Create a current experience report and specify the start date of your employment, your employment type, and complete all relevant fields.

7. Select Create.

Your Program Manager will receive an email to confirm your enrolment in the program. Once confirmed, your PER status will change to In Progress and you can begin submitting experience under the Pre-approved Program Route.

Having Trouble? Watch this video: [Confirming your Pre-approved Program](#)

PRE-APPROVED PROGRAM ROUTE (PPR)

Starting a New Job in PPR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report. Experience that falls on or after your PER Effective Date needs to be documented in a Current Experience Report.

2. If you are in an External Audit program, attach a completed [Chargeable Hours Form](#). Ensure the dates match the dates of your experience report(s).

3. In the Report Details tab, select Submit to set the report status Verified.

4. Ensure your mentor reviews are documented accurately. Students must have at least two mentor reviews for every twelve months of current experience or after each 4-month co-op term. Two mentor reviews are required for an 8-month co-op term.

5. In the Profession Assessment tab, select Request Assessment.

6. Select Change of Job Assessment from the drop-down menu.

7. Select the correct Program Leader from the drop-down menu.

8. Complete the declarations and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies will be recognized, if eligible. Your PER status and experience path will be set to Unemployed. You can then complete the below steps to become part of your new Pre-Approved Program roster:

1. On your profile page, update your Experience Path from Unemployed to Pre-Approved Program.

2. When you select the Pre-Approved Program experience path, you will be required to indicate the following fields:
    a. Organization
    b. Location
    c. Program

4. Update your mentor's email address from your PPR. If you are unsure, ask your Program Manager to confirm who your assigned mentor is.

5. When you are finished, select Save. You will be directed to the PERT homepage.

6. Select the Create New Report link.

7. Create a current experience report with the start date of your employment, your employment type, and fill in all relevant fields.

8. Select Create.

Your Program Manager will receive an email to confirm your enrollment in the program. Once confirmed, your PERT status will change to In Progress and you can continue submitting experience in the Pre-approved Program Route.

Having trouble? Watch this video: [Confirming your Pre-approved Program](#)

Leaving a Job in PPR for a Job in EVR

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report. Experience that falls on or after your PER Effective Date needs to be documented in a Current Experience Report.

2. If you are in an External Audit program, attach a completed Chargeable Hours Form. Ensure the dates match the dates of your experience report(s).

3. In the Report Details tab, select Submit to set the report status Verified.

4. Ensure your mentor reviews are documented accurately. Students must have at least two mentor reviews for every twelve months of current experience or after each 4-month co-op term. Two mentor reviews are required for an 8-month co-op term..

5. In the Profession Assessment tab, select Request Assessment.

6. Select Change of Job Assessment from the drop-down menu.

7. Select the correct Program Leader from the drop-down menu.

8. Complete the declarations and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies will be recognized (if eligible). Your PER status and experience path will be set to Unemployed and you can then complete the below steps to submit a Pre-Assessment:

1. On your profile page, update your Experience Path from Unemployed to Experience Verification.

2. Update your current mentor if you have changed mentors, or leave this field blank if you do not currently have one.

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3. Create an Initial Experience Report for your new job, including your job start date. The report status should be left as New and no competencies should be completed. Please attach your job description on company letterhead – ensure it is signed by your manager or HR and saved in PDF format.

4. Select Request Pre-Assessment in the Profession Assessment tab.

5. Complete the Candidate Declaration and select Create.

When your Pre-Assessment is approved, your PERT status will change to In Progress and you can continue submitting experience in the Experience Verification Route. If you have not added your mentor, you will need to do this within 90 days of being set to In Progress or your PER Status may be returned to Unemployed.

Having Trouble? Watch this video: Submitting a Pre-Assessment

Leaving a Job in PPR and Have Not Started a New Job

1. Create or update your experience report(s) to reflect your self-assessed proficiency levels for the technical and enabling competencies achieved during your employment period. A reminder that experience that falls before your PER Effective Date needs to be documented in a Prior Experience Report, and experience that falls on and after your PER Effective Date needs to be documented in a Current Experience Report.

2. If you are in an External Audit program, attach a completed Chargeable Hours Form. Ensure the dates match the dates of your experience report(s).

3. In the Report Details tab, select Submit to set the report status Verified.

4. Ensure your mentor reviews are documented accurately. Students must have at least two mentor reviews for every twelve months of current experience or after each 4-month co-op term. Two mentor reviews are required for an 8-month co-op term.

5. If your mentor relationship with your PPR mentor will be ending, please remove their email address from your profile.

6. In the Profession Assessment tab, select Request Assessment.

7. Select Change of Job Assessment from the drop-down menu.

8. Select the correct Program Leader from the drop-down menu.

9. Complete the declarations and select Create.

Once the review is complete, your assessment status will show as Completed and the status of your experience report(s) will change to Reviewed. Duration/competencies will be recognized, if eligible. Your PER status and experience path will now be set to Unemployed and can be updated when you become employed again.

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