

# Pre-approved Program Leader

## Factsheet

June 2018

### Your scope:

- Provide senior-level ownership of and commitment to the training of CPA students/candidates through a Pre-approved Program
- Sign-off on students/candidates' experience reported to the CPA profession, attesting to the factual accuracy and technical competency development
- Ensure that CPA students/candidates have appropriate supervision and mentorship and that all CPA students/candidates are following the work outlined in the Pre-approved Program
- Ensure that CPA students/candidates document their developing competencies using the online Practical Experience Reporting Tool (PERT)
- Ensure that CPA students/candidates are provided work from a diverse range and variety of clients while obtaining their required chargeable hours (*applicable for External Audit Pre-approved Programs only*)

### Your responsibilities:

- Complete declaration that the CPA students'/candidates' experience reports are accurate
- Indicate completion of practical experience (i.e. ready for certification or ready for certification but did not spend all 30 months in my program or departed program before completing required 30 months duration of practical experience)

### Your procedures:

**Any time a Pre-approved Program (PPR) student/candidate leaves the program, either prior to the 30 month duration or once the 30 month duration of practical experience is complete, the CPA student/candidate is required to complete and request a profession assessment via the Practical Experience Reporting Tool (PERT).**

1. When a CPA student/candidate selects a profession assessment, the Program Leader will receive a system-generated email instructing them to log onto PERT and complete declaration.
2. Program Leader PERT Login : <https://pert.cpa-services.org/DevelopmentLeader/Logon>
3. A CPA student/candidate that requires a Program Leader declaration will have an assessment status of "Certification Requested".
4. Program Leader should review the following:
  - Review Report Details within the experience report to ensure start and end dates and leaves taken are accurate

- Consolidated Summary – select the appropriate experience reports and then select **Assess**
    - » Review the technical and enabling competency development for reasonability
  - Review notes within the experience reports
    - » Review Mentor Review comments
5. Program Leader should then make the required declaration on “Profession Assessment” tab selecting “edit” and answering the following:
- **Statement #1** – Agree or Disagree that reports are accurate including leaves taken.  
Note: if Disagree is selected and the declaration is saved then the assessment will be cancelled.  
You will be required to provide comments as to why you selected Disagree.
  - **Statement #2** – Agree or Disagree that student/candidate was appropriately mentored and supervised while in your pre-approved program.  
Note: if Disagree is selected, you will be required to indicate why you are disagreeing
  - **Statement #3 You must select one of three options:**
    - » Option A – student/candidate spent all 30 months in your pre-approved program and is now complete.
    - » Option B – student/candidate indicates Practical Experience Requirements are met. However, the student/candidate did not spend all 30 months in your pre-approved program.
    - » Option C – student/candidate has departed from your pre-approved program.
6. Once you have answered Statement 1, 2 and 3, click **Save**.  
Note: If you have disagreed with Statement 1 and selected **Save**, the assessment has been cancelled and the student/candidate has received an email with your comments about what needs to be changed. The student/candidate will need to create a new assessment once they have made the changes.

#### NOTES:

The Program Leader will only see those student/candidates that have a profession assessment with a status of certification requested. For a listing of student/candidates, please go to Reports and run the Student Roster Report.

A profession assessment declaration MUST be made by the Program Leader before CPA will review the profession assessment.

If as a Program Leader you would like to have the assessment reviewed by your Program Manager first, please contact your provincial/regional body to inquire about the Data Check feature.

