

# FACT SHEET FOR PROGRAM LEADERS

## OF CPA ONTARIO'S PRE-APPROVED PROGRAMS

### Program leader role and responsibilities

- Provide senior level ownership of, and commitment to, the training of students in the CPA program.
- Complete a profession assessment declaration of the student's experience report in the Practical Experience Reporting Tool (PERT), attesting to its factual accuracy and alignment with the student's technical competency development.
- Ensure that students have appropriate supervision and mentorship and that all students are following the work outlined in the pre-approved program guidelines.
- Ensure students document their developing competencies using PERT.
- Ensure students are provided work from a diverse range and variety of clients while obtaining their required chargeable hours (applicable to External Audit only).

### How to complete a profession assessment

At any time when students leave the program, either prior to the 30-month duration or once the 30-month duration of practical experience is complete, they are required to complete an experience report and request a profession assessment via PERT.

When students select a profession assessment in PERT, the program leader will receive a system-generated email instructing them to log in to PERT and complete a declaration that the experience report is accurate.

1. Log in to [PERT](#)
2. The student's assessment status in PERT will read: "Certification Requested"
3. Review the following:
  - The consolidated summary – select "Experience reports" and then select "Assess"
    - Review and verify the technical and enabling competency development for reasonability
  - The notes within the experience report
  - The mentor review comments
4. Complete the declaration via the "Profession Assessment" tab, selecting the status date and then select "Edit" and answer the following questions:
  - **Question 1** – confirm reports are accurate including the indicated leaves taken
  - Must answer **ONE** of the following:
    - **Question 2** – applies if students completed all 30 months and are ready for certification
    - **Question 3** – applies if students are departing the program before completing all 30 months of practical experience
  - Once the declaration is completed, select "Save"
5. CPA Ontario will then review the profession assessment for final approval. Please allow 6 weeks for completion.

### Notes

The program leader does not have full visibility of the pre-approved program student roster, but only of those that have requested a profession assessment. However, the program manager of the pre-approved program is able to view the entire student roster.

For any questions, please send inquiries to [practicalexperience@cpaontario.ca](mailto:practicalexperience@cpaontario.ca).