

# FACT SHEET FOR PROGRAM MANAGERS

## OF CPA ONTARIO'S PRE-APPROVED PROGRAM

### Program manager role and employment requirements for students

As part of their responsibilities, the program managers need to confirm the employment information a student has entered into the Practical Experience Reporting Tool (PERT).

Students in the CPA program need to specify their employment details by updating their profile in PERT. This includes updating information about the organization, the location and information about the program. Students are also asked to provide their CPA Ontario mentor email address.

A student is eligible to have their Practical Experience Requirement (PER) effective date (the date experience begins to accumulate) calculated up to 90 days ago based on the following criteria:

- a) The job start date or CPA Ontario registration date occurred within the last 90 days.
- b) A mentor was identified at the time employment is confirmed.

Therefore, it is key for the student to create a "Current Experience Report" promptly so their job start date and type of employment (permanent, contract, co-op, intern) will be captured. We encourage mentors to be assigned **before** employment is confirmed based on the pre-approved program employer's requirement to assign students with mentors.

### How to confirm a student's employment information in PERT

1. Program managers will receive an email after a student indicates the above mentioned employment information in PERT, requiring the program manager to log in to [PERT](#) and verify the employment details of the student.
2. Program managers need to confirm whether the employment details of the student are accurate. Details to be confirmed are:
  - Start date and employment type
  - Program name and location
  - Assignment of CPA Ontario mentor

Below is a sample of the landing page for program managers, which is a roster of all students who indicated employment in the organization's pre-approved program:



The screenshot shows the 'Students/Candidates' page in the Practical Experience Reporting Tool. It features a search bar for finding candidates by last name, a 'Show Pending Only' link, and a table with columns for Confirm, Name, Program, Location, Start Date, Type, PER Status, Mentor, and Governing Body. Three rows of data are visible, each with radio button options for 'Return', 'No', and 'Yes'.

Confirm	Name	Program	Location	Start Date	Type	PER Status	Mentor	Governing Body
<input type="radio"/>	Pert Smith	Rotational	Toronto			In Progress	Danielle Sebastian	Ontario
<input type="radio"/>	Pert Smith	Rotational	Toronto			Employment Confirmation Required	Danielle Sebastian	Ontario
<input type="radio"/>	Pert Smith	Rotational	Toronto	04/01/2016	Co-op	Employment Confirmation Required	Danielle Sebastian	Ontario

Program managers can select "Show Pending Only" to identify which student requires employment confirmation.

3. When confirming a student's employment, program managers will encounter three options – "Yes", "No", or "Return"
  - **Yes:** If program details and start date are correct, then select "Yes" and click "Submit" to confirm employment of that student in the program. The "PER Status" will then change to "In Progress".
  - **No:** If the program details are incorrect or if the student is not in your pre-approved program, select "No" and click "Submit" to generate an automated message that will be sent to CPA Ontario, to follow up with the student.
  - **Return:** If there is no start date or type indicated, select "Return" and click "Submit" to generate an automated email notification to the student to notify them that they must log in to PERT to create a current experience report, including a job start date. Once the student completes this, the job start date and type will be visible the next time program managers log in to PERT.

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