

INTRODUCTION TO YOUR EXERCISE:

(CORE 1 activity - week 4)

In addition to completion of the CPA PEP and CFE, the CPA certification program requires students to complete a minimum of 30 months of relevant practical experience. The knowledge and competencies gained through practical experience complement those developed through education.

Ultimately, the goal of your practical experience is for you to develop both technical and professional skills to set you up as a successful CPA.

You are required to report your Practical Experience to CPA International as it is being earned. If you are employed in a qualifying role and are not yet reporting your practical experience, you may be at risk of losing practical experience duration.

Therefore, the purpose of this exercise is to ensure **all candidates** are registered in PERT, and all who are employed in a qualifying role are reporting their practical experience concurrently with completing CPA PEP. This will minimize delays for certification upon successful completion of the CPA academic requirements (PEP and CFE). Those candidates not currently in a qualifying role or unemployed are still required to create their PERT profile by following one of the options below and submitting a screenshot to your Facilitator.

Please see further instructions on next page.

OPTIONS TO CREATING A PERT PROFILE AND SUBMITTING A SCREENSHOT:

Please follow the link to the instructions that apply to you. If you are unsure which option applies to you, please email internationalinquiries@cpacanada.ca.

1. Click here if you are already [reporting your Practical Experience in PERT](#)
2. Click here if you are in the [Experience Verification Route](#) and [have not](#) yet accessed PERT
3. Click here if you are in a [Pre-Approved Route](#) and [have not](#) yet accessed PERT
4. Click here if you are [currently unemployed or not in a qualifying role](#)

QUESTIONS?

If you have any questions regarding practical experience,
please email internationalinquiries@cpacanada.ca

OPTION 1: STUDENTS WHO ARE ALREADY REPORTING PRACTICAL EXPERIENCE IN PERT (PRE-APPROVED PROGRAM AND EXPERIENCE VERIFICATION ROUTE)

Step 1: Log into [PERT](https://pert.cpa-services.org/Student/Logon) (https://pert.cpa-services.org/Student/Logon)

Take a screenshot of your experience reports tab, showing the populated PER effective date **if applicable** and submit to your Dropbox in D2L

Fransais English Student Sign Out

cpa CHARTERED PROFESSIONAL ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL

Experience Reports Consolidated Summary Mentor Reviews Profession Assessments

Profile
Experience
User Guide - Quick Reference
User Guide - EVR
User Guide - PPR

Experience Reports

PER Status In Progress **Mentor** Mentor name

Next Profession Assessment Upon Completion **Next Mentor Review** 01/05/2017

PER Effective Date 31/10/2016

| Status | Date | Employer | Position | Report Period | Hrs/Wk | Report Type | Leave Taken | Duration Recognized (in months) |
|----------|------------|----------|----------|--------------------------|--------|--------------------|-------------|---------------------------------|
| Reviewed | 02/03/2017 | | | 28/09/2015 to 31/10/2016 | 50.00 | Prior EV | 15 | 12.00 |
| Reviewed | 01/11/2016 | | | 28/09/2015 to 27/10/2016 | 50.00 | Current Experience | 15 | 0.00 |

Create New Report

PERT User Guides are available in PERT for the [Experience Verification Route \(EVR\)](#) and the [Pre-Approved Route \(PPR\)](#).

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OPTION 2: STUDENTS IN EXPERIENCE VERIFICATION ROUTE WHO HAVE NOT ACCESSED PERT

Step 1: Log into [D2L](https://education.cpacanada.ca/) (<https://education.cpacanada.ca/>)

- Open 'Practical Experience Orientation Student' module
- Review orientation webinars
- Complete quiz with a minimum of 60%
- After [one business day](#) create your profile in PERT by logging in per Step 2 below.

Step 2: Log into [PERT](https://pert.cpa-services.org/Student/Logon) (<https://pert.cpa-services.org/Student/Logon>)

Step 3: Create profile

- Enter your CPA ID and name
- Enter your experience path as: Experience Verification
- Indicate your language preference
- Add your mentor's email address *
- When you are complete, click "Save"

** you may leave this field blank, but it is important to know your duration will not start counting until you have a CPA Mentor*

Step 4: Create a Current Experience Report

- You will be directed to the home page in PERT, click on the "Create New Report" link
- Create a "Current Experience Report" with the start date of your employment, and fill in all of the required fields - **Do NOT complete any leave or competencies at this time.**
- Click "Create"
- Once you have created your Experience Report, you are required to attach a job description on company letterhead by navigating to the "Attachments" tab.

Step 5: Submit a Pre-Assessment to CPA International

- Return to the Experience Reports page. You will see your report in a "New" status, navigate to the "Profession Assessment" tab.
- Request a Pre-Assessment by clicking on the link.

Step 6: Take a Screen Shot and submit to your Dropbox in D2L

| Assessment Type | Assessment Status | Status Date | Comments |
|-----------------|-------------------|-------------|----------|
| Pre-Assessment | Required | 21/03/2017 | |

To request a pre-assessment:

- candidate's PER status must be "Pre-Assessment Required"
- candidate must have created a current experience report with report details section filled out
- previously requested pre-assessment, if any, must be completed or canceled

To request a profession assessment:

- candidate's PER status must be "In Progress"
- previously requested assessment, if any, must be completed or canceled
- at least one report must be in a verified or reviewed status

Having trouble? Please see [PERT User Guide for Students in the Experience Verification Route \(EVR\)](#) for screen shots (refer to steps 2, 3 and 4 within guide)

QUESTIONS?

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OPTION 3: STUDENTS IN PRE-APPROVED PROGRAM ROUTE WHO HAVE NOT ACCESSED PERT

Step 1: Log into [D2L](https://education.cpacanada.ca/) (<https://education.cpacanada.ca/>)

- Open 'Practical Experience Orientation Student' module
- Review orientation webinars
- Complete quiz with a minimum of 60%
- After [one business day](#) create your profile in PERT

Step 2: Log into [PERT](https://pert.cpa-services.org/Student/Logon) (<https://pert.cpa-services.org/Student/Logon>)

Step 3: Create profile

- Enter your CPA ID and name
- Enter your experience path as: Pre-Approved program
- When you select the Pre-Approved Program experience path, you will be required to indicate the following fields:
 1. Organization
 2. Location
 3. Program
- In the "Organization" field, once you begin typing the name of your organization, a list of locations will populate, as well as the program name. Make the appropriate selections.
- Add your mentor's email address. If you are unsure, confirm who your assigned mentor is with your program manager.
- You may leave this field blank, but it is important to know your duration will not start counting until you have a CPA Mentor.
- When you are complete, click "Save".

Step 4: Create a Current Experience Report

- You will be directed to the home page in PERT, click on the "Create New Report" link.
- Create a "Current Experience Report" with the start date of your employment, your employment type, and fill in all relevant fields. **Do NOT complete any leave or competencies at this time.**
- Click "Create".

Step 5: Take a Screen Shot and submit to your Dropbox in D2L

Having trouble? Please see the [PERT User Guide for Students in the Pre-approved Program Route \(PPR\)](#) for screen shots (refer to steps 2, and 3 within guide)

QUESTIONS?

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OPTION 4: STUDENTS WHO ARE UNEMPLOYED OR NOT IN A QUALIFYING ROLE

Step 1: Log into [D2L](https://education.cpacanada.ca/) (<https://education.cpacanada.ca/>)

- Open 'Practical Experience Orientation Student' module
- Review orientation webinars
- Complete quiz with a minimum of 60%
- After [one business day](#) create your profile in PERT

Step 2: Log into [PERT](https://pert.cpa-services.org/Student/Logon) (<https://pert.cpa-services.org/Student/Logon>)

Step 3: Create profile

- Enter your CPA ID and name
- Enter your experience path as: Experience Verification
- Indicate your language preference
- When you are complete, click 'Save'

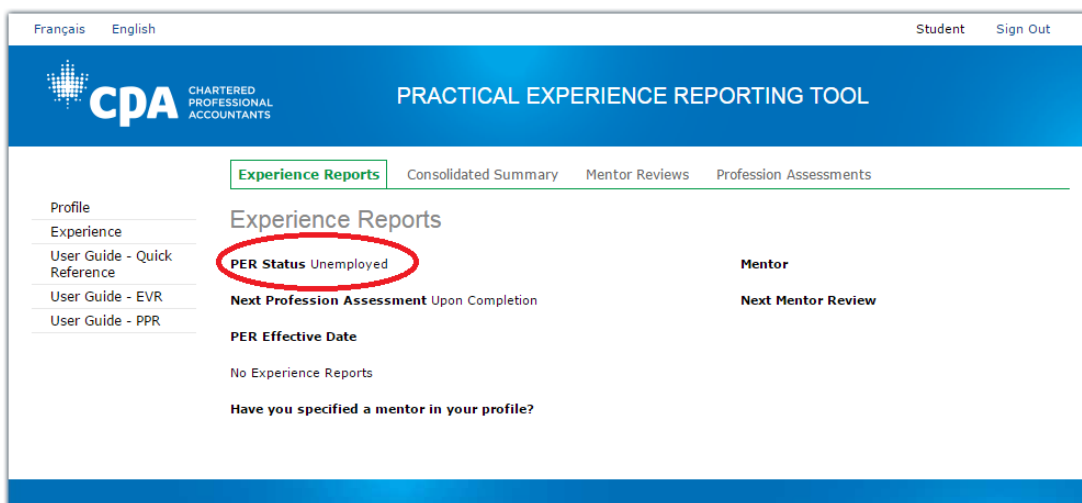
Step 4: Update employment status

You will be directed to the PERT landing page, go back into your profile and set your employment status to 'Unemployed'. *

**At later date, once you have secured a relevant position, please create a new report and request a pre-assessment based on the experience verification steps above.*

** If you are scheduled to begin work in a Pre-approved Program later on in the year, your experience path may be changed when you start reporting.*

Step 5: Take a Screen Shot and submit to your Dropbox in D2L



The screenshot shows the PERT (Practical Experience Reporting Tool) interface. At the top, there are language options (Français, English) and user links (Student, Sign Out). The main header includes the CPA logo and the title 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below the header, there are tabs for 'Experience Reports', 'Consolidated Summary', 'Mentor Reviews', and 'Profession Assessments'. The 'Experience Reports' tab is active. On the left sidebar, there are links for 'Profile', 'Experience', 'User Guide - Quick Reference', 'User Guide - EVR', and 'User Guide - PPR'. The main content area displays 'Experience Reports' with a sub-section 'PER Status Unemployed' circled in red. Other fields visible include 'Next Profession Assessment Upon Completion', 'Next Mentor Review', 'PER Effective Date', 'No Experience Reports', and a question 'Have you specified a mentor in your profile?'.

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