

Reporting your Practical Experience

Once approved to report experience from a qualifying role, all future CPA's are required to report their practical experience at least semi-annually (i.e. once you have a [PER Start Date](#), experience must be reported every six months).

PER Start Date:

- ✓ [Prior Experience](#)
 - ✓ Set your next [Experience Report](#)
-

Semi-annually:

- ✓ [Report your Current Experience](#)
 - ✓ [Meet with Mentor](#)
-

When required:

- ✓ [Verify report](#)
- ✓ [Request CPA Review](#)

Current Experience

All future CPA's are required to report their practical experience and meet with their mentor approximately every six months from their PER Start Date to discuss your experience reports.

Prior Experience

Prior experience is for experience gained before your PER Start Date. Depending on when your PER Start Date is, you may need to report a portion of your current role in a prior experience report.

You can also report experience from a previous role, as long as it will demonstrate at least one level one sub competency and is for at least three months duration.

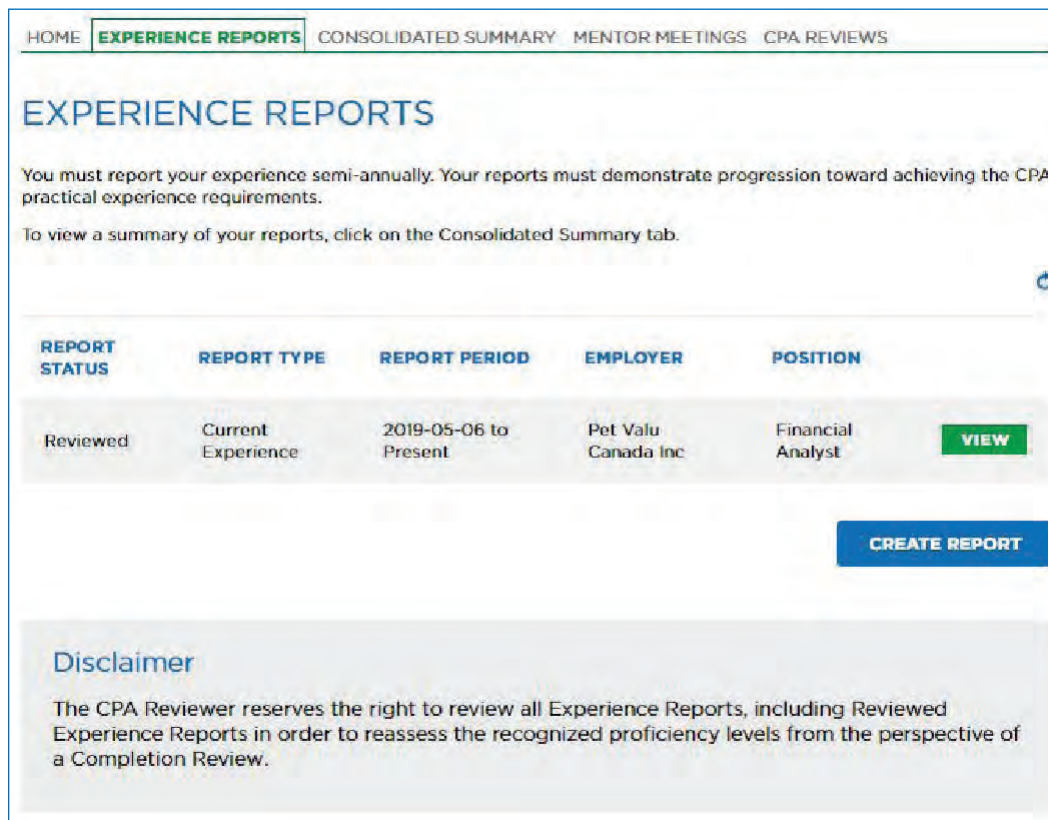
A maximum of 12 months of prior experience can be recognized towards your duration requirement.

In some circumstances, there may be a fee to have your prior experience recognized.

See section 2.5.9.1 of the [CPA Practical Experience Requirements \(CPA PER\)](#) for more information.

To Report your Experience:

1. Go to your Experience Reports page
2. Click **CREATE REPORT** to generate a new (blank) experience report.



HOME **EXPERIENCE REPORTS** CONSOLIDATED SUMMARY MENTOR MEETINGS CPA REVIEWS

EXPERIENCE REPORTS

You must report your experience semi-annually. Your reports must demonstrate progression toward achieving the CPA practical experience requirements.

To view a summary of your reports, click on the Consolidated Summary tab.

REPORT STATUS	REPORT TYPE	REPORT PERIOD	EMPLOYER	POSITION
Reviewed	Current Experience	2019-05-06 to Present	Pet Valu Canada Inc	Financial Analyst

VIEW

CREATE REPORT

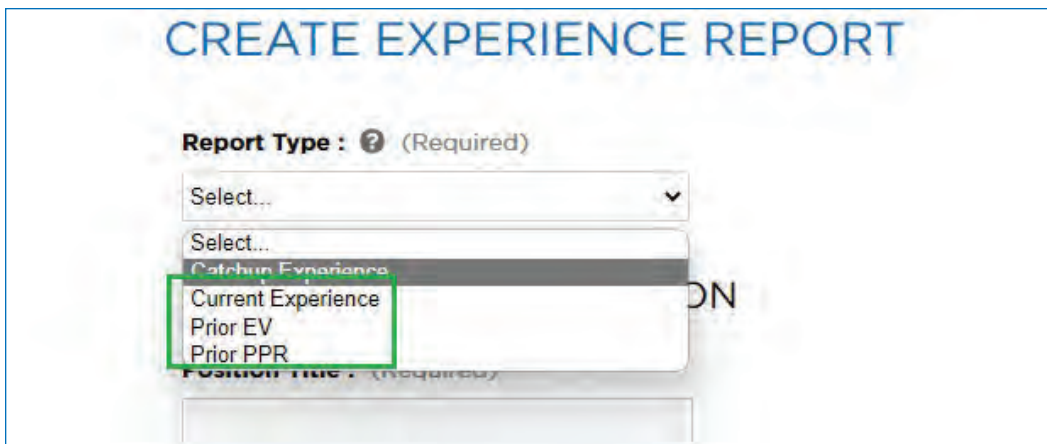
Disclaimer

The CPA Reviewer reserves the right to review all Experience Reports, including Reviewed Experience Reports in order to reassess the recognized proficiency levels from the perspective of a Completion Review.

3. Select your Report Type

Prior PPR is experience that you gained **before** your PER Start Date while working within a PPR. Your Program Leader will need to certify this experience.

Prior EVR is experience that you gained **before** your PER Start Date outside of a PPR.



The screenshot shows a web form titled "CREATE EXPERIENCE REPORT". A dropdown menu for "Report Type" is open, showing four options: "Catchup Experience", "Current Experience", "Prior EV", and "Prior PPR". The "Current Experience" option is highlighted with a green box. The dropdown is labeled "Report Type : ? (Required)".

(Note: A prior report cannot have an end date after your PER Start Date. If you are still employed in this role, input the end date as the day before your PER Start Date and create a separate current report.)

Current Experience is experience that you gain after your PER Start Date

1. Complete the required fields.
2. Click SAVE

- This will create your report. You will navigate to the Report Details page within your new experience report.

Student First Student Last - CPA student - TEST PPR (2022-09-06 - 2023-04-04)

Report Details > Technical Competencies > Enabling Competencies > Notes > Attachments > Summary

REPORT DETAILS

OVERVIEW

Status : New	Calculated Duration : 6.94 months
Status Change Date : 2023-04-05	Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Prior PPR	Experience Type : Pre-approved Program
Position Title : CPA student	Employer : TEST PPR
Training Position : CPA Student	
Position Type : Permanent	Start Date : 2022-09-06
Average Hours Worked Per Week : 37.50	End Date : 2023-04-04

- Click Save & Continue to advance to the Technical Competency page.

Reporting your Technical Competencies:

PPR:

Displayed you will find your technical competencies relevant to your Pre Approved program. Select a self-assessed proficiency value for all populated sub-competencies. Select level 0 if you have had no exposure to a particular sub-competency during this reporting period.

To expand on a competency area, click “+”.

For further information use the (?) for additional guidance.

Report Details > Technical Competencies > Enabling Competencies > Notes > Attachments > Summary

TECHNICAL COMPETENCIES

Below you will find your technical competencies relevant to your Pre Approved program. Select a self-assessed proficiency value for all populated sub-competencies. Select level 0 if you have had no exposure to a particular sub-competency during this reporting period.

To expand on a competency area, click “+”.

For further information use the (?) for additional guidance.

Be sure to Save your work often, so you do not lose any of your work.

COMPETENCY AREA	YOUR SUB-COMPETENCIES
Financial Reporting (FR) ?	4
Audit and Assurance (AA) ?	3
Finance (FN) ?	1
Taxation (TX) ?	1
Strategy and Governance (SG) ?	1

Financial statement analysis (FR4)

TARGET PROFICIENCY: 2 CIRCUMSTANCE: Routine COMPLEXITY: High AUTONOMY: High

SELF-ASSESSED PROFICIENCY: [Select] CPA REVIEWED PROFICIENCY: [?]

Responsible for preparation and/or interpretation of financial statement analysis (including consideration of interrelationships). Depending on the complexity of the business, it may be sections rather than the entire results (e.g. revenue and cost of goods sold). Discuss with management to understand the results or explain the results to the staff responsible for the engagement.

Reviewer Notes

[CANCEL] [SAVE]

Audit and Assurance (AA)	3	+
Finance (FN)	1	+
Taxation (TX)	1	+
Strategy and Governance (SG)	1	+

[BACK] [SAVE & EXIT] [SAVE & CONTINUE]

Once finished click save & continue to [report your enabling competencies](#).

EVR

Displayed you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the sub-competencies that are relevant to your experience for this reporting period.

It is not realistic or expected that you would demonstrate proficiency in all competency areas.

Using the table to choose which competency areas are relevant to your experience by selecting Yes or No.

Report Details > Technical Competencies > Enabling Competencies > Notes > Attachments > Summary

TECHNICAL COMPETENCIES

Below you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the sub-competency that are relevant to your experience for this reporting period.

To understand the CPA Practical Experience Requirements of Circ. Breadth and Depth, review the Resource section in PERT or utilize the Consolidated Summary.

It is not realistic or expected that you would demonstrate proficiency in all competency areas.

Use the table below to choose which competency areas are relevant to your experience by selecting Yes or No.

By selecting No, those competency areas will not appear in this experience report. You can update your No selection to Yes at any time.

Financial Reporting (FR)	<ul style="list-style-type: none"> Do you assess the financial reporting needs of external financial statement stakeholders? Do you evaluate accounting policies or prepare accounting transactions? Do you research or review the Financial Reporting Handbook to prepare accounting entries? Do you prepare or review parts of or full sets of financial statements and note disclosures for external stakeholders? Do you evaluate year-over-year actual changes on part of a financial statement analysis? 	Yes
Audit and Assurance (AA)	<ul style="list-style-type: none"> Do you perform internal audit or external assurance engagements? Do you assess the control environment and the control to the information systems and related internal control processes? Do you perform audit planning and/or testing procedures? 	No
Finance (FN)	<ul style="list-style-type: none"> Do you assess any risks and ratios that could impact the overall health of the organization? Do you evaluate or review financial risk management policies and/or recovery plans? Do you assess the financial viability of business proposals? Do you analyze financial models and evaluate the feasibility of capital projects? Do you analyze cash flows and make recommendations? 	Yes
Taxation (TX)	<ul style="list-style-type: none"> Are you involved with tax research, tax planning, or preparing tax returns either for your organization or for a client? 	No
Strategy and Governance (SG)	<ul style="list-style-type: none"> Does your role include analyzing and assessing the entity's risk management process and/or strategies? Do you provide recommendations on the strategic plan, considering internal/external factors? Do you prepare information to ensure your organization remains compliant with regulatory requirements? 	No
Management Accounting (MA)	<ul style="list-style-type: none"> Do you prepare internal reports to support management decision making? Are you involved in planning, budgeting or forecasting? Do you analyze cost, revenue or profitability for your organization? Do you analyze the key performance indicators of your organization's employees and business units? 	Yes

By selecting No, those competency areas will not appear in this experience report. You can update your No selection to Yes at any time. Once a competency section is saved, the Yes selections response cannot be edited.

Click “+” to expand on a competency area

Use the (?) for additional guidance.

Once finished click save & continue to [report your enabling competencies](#).

ENABLING COMPETENCY	ANSWERED	SELF-ASSESSED PROFICIENCY	CPA REVIEWED PROFICIENCY	
Question 1: Acting Ethically and Demonstrating Professional Values		Not assessed	Not assessed	+
Question 2: Solving Problems and Adding Value		Not assessed	Not assessed	+
Question 3: Communicating		Not assessed	Not assessed	+
Question 4: Managing Self		Not assessed	Not assessed	+
Question 5: Collaborating and Leading		Not assessed	Not assessed	+

SUMMARY QUESTION	ANSWERED
Summary Questions	

Reporting Your Enabling Competencies

There are five competency areas containing three-part questions. You are not expected to document all five enabling competencies semi-annually. Only document the enabling competencies that most reflect your professional development obtained during this reporting period. Click “+” to expand on a competency area.

Once finished click save & continue.

Notes & Attachments

Use these sections to provide additional details if applicable.

The screenshot shows the 'NOTES' section of the reporting interface. At the top, a navigation bar includes 'Report Details' (checked), 'Technical Competencies', 'Enabling Competencies', 'Notes' (highlighted), 'Attachments', and 'Summary'. Below the navigation bar, the heading 'NOTES' is displayed. There is a link for 'Add Note'. At the bottom right, there are three buttons: 'BACK', 'SAVE & EXIT', and 'SAVE & CONTINUE' (highlighted).

The screenshot shows the 'ATTACHMENTS' section of the reporting interface. At the top, a navigation bar includes 'Report Details' (checked), 'Notes' (checked), 'Attachments' (highlighted), and 'Summary'. Below the navigation bar, the heading 'ATTACHMENTS' is displayed. A message states: 'In order to validate your employment information, please provide the following:'. A bulleted list follows:

- A detailed current job description which includes your job start date on company letterhead, or a document signed by your HR department.
- An Organization Chart (Manitoba or International only).
- Your current resume (Manitoba or International only).

Below the list is a file selection area with a 'Choose File' button and the text 'No file chosen'. An 'UPLOAD' button is located below the file selection area. At the bottom right, there are two buttons: 'BACK' and 'SAVE & CONTINUE' (highlighted).

Otherwise Save & Continue to the Summary page.

If you are done making changes, select Complete to update the status of your experience report.

The screenshot shows the 'SUMMARY' section of the reporting interface. At the top, a navigation bar includes 'Report Details' (checked), 'Technical Competencies', 'Enabling Competencies', 'Notes', 'Attachments', and 'Summary' (highlighted). Below the navigation bar, the heading 'SUMMARY' is displayed. A message states: 'Before finishing the edits of your experience report:'. A bulleted list follows:

- Include any Leave days taken to reflect time away from work
- Your supervisor information is accurate
- You have reported on the relevant technical competencies developed during the reporting period

Below the list is a message: 'If you are done making changes, select **Complete** to update the status of your experience report:'. A message follows: 'A Completed report enables you to:'. A bulleted list follows:

- Request a mentor meeting
- Send your experience report to your supervisor
- Enter a date for your Next Experience Report Date

Below the list is a message: 'Return to your Home Page to GET STARTED on your Action Items.'. At the bottom right, there are four buttons: 'BACK', 'PRINT', 'DELETE', and 'COMPLETE' (highlighted).

Future CPA’s who are reporting pre-approved program that is not a secondment type experience, will have their report status updated to Verified, as supervisor verification is not a required step.

HOME | **EXPERIENCE REPORTS** | CONSOLIDATED SUMMARY | MENTOR MEETINGS | CPA REVIEWS

EXPERIENCE REPORTS

You must report your experience semi-annually. Your reports must demonstrate progression toward achieving the CPA practical experience requirements. To view a summary of your reports, click on the Consolidated Summary tab.

REPORT STATUS	REPORT TYPE	REPORT PERIOD	EMPLOYER	POSITION	
New	Current Experience	2023-04-03 to Present	Fake Company	CPA student	VIEW
Verified	Prior PPR	2022-09-06 to 2023-04-04	Fake Company	CPA student	VIEW

[CREATE REPORT](#)

REPORT DETAILS

OVERVIEW

Status : Verified	Calculated Duration : 6.94 months
Status Change Date : 2023-04-12	Recognized Duration :

Future CPA’s who are reporting pre-approved program that is not a secondment type experience, a verified report enables you to:

- Request a mentor meeting
- Enter a date for your Next Experience Report Date

Return to your Home Page to GET STARTED on your Action Items.

Future CPA’s who are reporting experience verification type experience or a secondment in a pre-approved program, will require supervisor verification after clicking complete.

Future CPA’s who are reporting experience verification type experience or a secondment in a pre-approved program, a Completed report enables you to:

- Request a mentor meeting
- Send your experience report to your supervisor
- Enter a date for your Next Experience Report Date

Return to your Home Page to GET STARTED on your Action Items.

The screenshot displays a web application interface with a navigation bar at the top containing links for HOME, EXPERIENCE REPORTS, CONSOLIDATED SUMMARY, MENTOR MEETINGS, and CPA REVIEWS. Below the navigation bar, there are two main sections, each titled 'HOME' and 'ACTION ITEMS'. The first section features a card titled 'SCHEDULE YOUR MENTOR MEETING' with a description: 'Your experience report is complete and ready for discussion with your mentor. Schedule a Mentor Meeting now..'. To the right of this card is a date 'May 27, 2023' and a green 'GET STARTED' button. The second section contains two cards. The first card is titled 'SET YOUR NEXT EXPERIENCE REPORT DUE DATE' with a description: 'Thank you for completing your experience report. Set your next experience report due date to remind yourself when you need to complete your report again. Remember, you should report your experience semi-annually.' It includes a date 'Mar 29, 2022' and a green 'GET STARTED' button. The second card is titled 'SEND YOUR EXPERIENCE REPORT FOR SUPERVISOR VERIFICATION' with a description: 'Your experience report Nov 22, 2018-Jun 14, 2019 is complete and can be sent to your supervisor for verification.' It includes a date 'Jun 27, 2022' and a green 'GET STARTED' button.