Practical Experience FAQ

Here are quick answers to some common questions you may have.

Be sure to check back regularly—this document will be updated as more frequently asked questions arise.

1. **When can I start reporting my practical experience?**

    - Only PEP candidates are required to report practical experience
    - Candidates will only start reporting practical experience once they receive access to PERT.
    - Candidates will receive access to PERT once the PEP deadline has closed, and their registration has been fully processed.
    - Candidates will receive an email with instructions on how to create a PERT profile once portal access has been granted.

2. **I am taking the preparatory courses, when can I report my experience?**

    - Only PEP candidates are required to report their practical experience.
    - Once a candidate is registered for PEP and their registration is fully processed, they will receive access to PERT

3. **What is a relevant position?**

    - A relevant position would be the ability to gain at least 3 technical sub-competencies at a level 1 within 12 months and the ability to continue gaining competencies, complexity and progression throughout the remainder of the duration
    - A minimum of 8 sub-competencies are required by the time of completion to meet the technical competency requirements (core, depth and breadth)
    - Progression and increased complexity are required throughout a candidate's duration

4. **What is the difference between pre-approved route and experience verification route?**

    Pre-approved:

    - Pre-approved route is when a candidate is employed with an organization that has been granted pre-approved status and is employed in a pre-approved position.
    - To be pre-approved, the organization completes an application to be approved by CPA Atlantic School of Business, and the Provincial CPA Body
    - The position to be pre-approved is mapped between the organization and CPA Atlantic School of Business.
    - Because the position is mapped and approved by the profession, the technical competencies for a pre-approved candidate are already completed for them.
    - There is a program manager, program leader and mentor assigned and responsible for the candidate on completing their experience reports and requirements

    Experience Verification:

    - Candidates reporting as experience verification are required to complete the technical competencies with their own examples.
    - Candidates reporting as experience verification should reference the Guiding Questions document and Understanding the Technical and Enabling Competencies document to help them understand and formulate their responses for the technical competencies

- Candidates in the experience verification route are required to have a supervisor to verify their reports and validate that the technical competencies they are reporting on, reflect the candidates' position
- Experience verification candidates are required to submit a CPA Review at the 12 months duration to ensure they are in line with the CPA Practical experience requirements

5. **How do I know if I'm employed in a pre-approved position?**

- Candidates can find a listing of the pre-approved offices HERE
- If the organization is listed, you would need to speak to your manager directly to verify the position you are employed in, is part of the pre-approved program through your employer

6. **What is a PER start date (Practical Experience Reporting start date)?**

- Your PER start date is the official start of your 30 months duration and what separates your prior experience from current experience.

For example: if you have confirmed employment and identified a mentor today, your PER start date will be set to today.

- You would be able to claim 12 months of experience prior to this date.
- From the PER start date (today), onward is considered current experience.

7. **How do I activate my PER start date (Practical Experience Reporting start date)?**

- Once a candidate creates their PERT profile, confirms employment as EVR or PPR and identifies a mentor- they will activate their PER start date

8. **Do I need a mentor if I'm unemployed?**

- **No,** candidates are only required to have a mentor once employed in a relevant position as experience verification route, or one will be appointed to you by your pre-approved program

9. **How can I find a mentor?**

EVR: Candidate's reporting as experience verification route (EVR) are responsible for finding their own mentor. We would suggest the following:

- Ask a CPA within your organization
- Ask your supervisor/manager/colleagues if they know any CPA's that would be interested in being your mentor
- Search using the Mentor portal located within PERT
  - The mentor portal is only available to candidates who have a PERT profile created and are employed in a relevant position

PPR: Candidate's reporting in pre-approved will be assigned a mentor by their program manager

- Pre-approved programs have designated mentors for their candidate

10. Can I change mentors?

- Candidates can change and/or update their mentor at any time throughout their practical experience reporting.
- Keeping in mind candidates in the pre-approved program are assigned a mentor through their program manager
- Candidates can update their mentor from their Home page and clicking on “view profile”
  - *Note: candidate must remove current mentor and save, and then edit again with new mentor’s email address, and save again.*

11. What role does a mentor play in your Practical Experience?

- A mentor provides guidance and support to candidates throughout their reporting periods- mainly concentrated on professional behavior and ethical responsibility
- A candidate and a mentor meet semi-annually, after a candidate completes a semi-annual report
- Candidates are required to request their mentor meetings in PERT so their mentor can document their meetings once completed
- Candidates will reach out to their mentors directly through email to schedule a day and time to meet with their mentor
- During a mentor meeting candidates and mentors may discuss their experience to date as well as their progress within the CPA program

12. What role does your supervisor play in your Practical Experience? (EVR)

- A supervisor will verify your report details, each technical sub-competency, enabling competencies and complete a declaration attestation
- A supervisor will verify the details within your report, that they are true and reflective of your employment position
- A supervisor will receive a link to the candidates report via email when a candidate places their report to “verification requested”

13. What role does your Program Manager play in your Practical Experience? (PPR)

- A program manager accepts candidates into their pre-approved program
- They confirm employment start date and that you are in fact in the specific pre-approved position and program
- A program manager also provides candidates with their mentors
- Program managers can also complete a final check of the candidates reports, days of leave, appropriate mentor meetings, and chargeable hours when a candidate requests a completion or change of job assessment

14. What role does your Program Leader play in your Practical Experience? (PPR)

- A program Leader completes your final sign off of your reports,
- and signs off on your chargeable hours if you are employed in a licensure stream.

15. What is the difference between prior and current experience?

- Prior experience is relevant experience that has taken place prior to your PER start date
- Current experience is relevant experience that has taken place from your PER start date onward
- A prior experience report is used to capture prior experience,
- Current experience report is used to capture current experience
- All experience must be within the 7-year window of a candidate starting and completing PEP

16. Am I able to claim experience which took place prior to starting the professional education program (PEP)?

- **Yes,** candidates can claim up to 12 months of relevant prior experience
- Prior experience is captured in the Practical Experience Reporting Tool (PERT) as a prior report.
- Prior PPR- is prior experience if the experience was gained through a pre-approved program
- Prior EV- is prior experience is if the experience was gained through experience verification route
- Prior experience must be relevant experience dated before your PER start date.
- Candidates must have a recognizable supervisor/manager that is currently working at the organization verify/sign off on the report.
- We suggest candidates contact the organization prior to creating the report for available contact information
- Prior experience will only be recognized if the report is at least 3 months in duration and has at least two level 1's attainable for the 12 months duration.
- Prior experience must be within the 7 years allowed to attain practical experience (5 years for public accounting)

17. Do I have to gain competency in all the technical competencies?

- **NO,** Candidates should only focus on the technical competencies that refer to their specific position
- Providing responses only to the technical sub-competencies that are relevant to the candidate's tasks/duties
- If a candidate does not complete a competency and/or sub-competencies that pertain to their specific position and tasks/duties, they should not provide a response

18. Do I have to answer all the enabling competencies?

- We recommend candidates respond to at least 1 or two enabling questions per report
- By the end of a candidate's practical experience requirements, all enabling competencies are required to be answered to a level 2
- Some enabling questions have more than one question- only one of these questions need to be answered to a level 2 by the time a candidate has completed their experience
- Each enabling question is required to be answered using the CPA Way (refer to Understanding the Technical and Enabling Competency document HERE)

19. My PERT file is set to “Pending Enrollment”- what does this mean?

- If your PERT file is set to “Pending Enrollment”, you have selected to report as pre-approved.
- Be sure you created the report to confirm your employment and identified your mentor
- Reach out to your program manager to ensure your employment is confirmed
- Complete details HERE (Confirmation of employment for pre-approved)

20. My PERT file is set to “Pre-assessment Required”- what does this mean?

- If your PERT file is set to “Pre-assessment Required”, you have selected to report as experience verification.
- Be sure you created a report to confirm your employment and submitted it for pre-assessment.
- A detailed job description must be attached to the report’s attachment tab
- Complete details HERE (Confirmation of employment for experience verification)

21. What does “Leave Taken (days) mean?

- “Leave Taken (days)” refers to any days you were not at work. This includes sick days, vacation days, study or exam days, and professional development (PD) days, etc.

22. Do I lose any of my experience if I change from one route to the other?

- No, even if candidates change routes, and as long as they are in a relevant position, candidates will continue to gain duration and competencies from where they left off.
- However, you may require additional duration to meet the core, breadth and depth requirements if you are switching roles.

23. Are there resources available for PERT reporting?

Yes, please visit our Practical Experience section **HERE**

24. What if I take parental leave while I’m reporting?

- This type of leave is not recorded as “Leave Taken” and will appear as a gap between your reporting periods.
- Please inform the practical experience team of any maternity/parental leave via email at practicalexperience@cpaatlantic.ca.

25. What does each report status mean:

- **Report in “New” status:** Candidate has just created the report and have not fully saved and completed the report
- **Report in “Complete” Status:** Candidate has saved and completed the information within their report, but if EVR, has not submitted the report to their supervisor for verification
- **Report in “Verification Requested”:** **(***reports created as experience verification or a secondment through pre-approved)*
- A link to the specific report has been emailed to the supervisor listed within the report. The supervisor has not completed the verification process.

- EVR candidates can view the report to see if their supervisor has completed the verification. Candidates can open the report, go to each tab and scroll down to see if the supervisor has agreed or not agreed to each page. Each technical competency completed with a response must be verified by the supervisor individually. If this is done and yet the report is still in a verification requested status, your supervisor did not complete the verification.
- **Report in "Verified" status:**
- EVR candidates , if your report is in a "verified" status, this means your report has been verified by your supervisor
- As pre-approved, and because the technical competencies are already pre-selected and approved, your reports will automatically go into a "verified" status once completed all the way through.

26. I submitted a CPA Review, what does my assessment status mean:

- **"Assessment Requested"**- your CPA Review has been requested and in queue, but not assigned to a reviewer yet
- **"Certification Requested**"-(PPR) your CPA Review is waiting sing off by your Program Leader
- **"Require"**- your assessment request is in queue and assigned to a reviewer
- **"Data Check"**- your assessment is in queue with your Program manager for review, prior to being sent to the program leader for final sign off
- **"Follow up"**- further information is required, review the notes left by the reviewer in your CPA review
- **"Cancelled"**- your CPA review request has been canceled, review the notes left by the reviewer in your CPA review
- **"Completed"**- your CPA Review has been completed, review the notes left by the reviewer in your CPA Review