PRACTICAL EXPERIENCE REPORTING REQUIREMENTS FOR CO-OP STUDENTS

CPA ONTARIO

Reporting practical experience while working as a co-op student is highly recommended. Follow the 6 steps below to begin recording your experience in the Practical Experience Reporting Tool.

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Reporting practical experience (PE) while working as a co-op student is highly recommended (The second option is to report PE once full time employment is obtained)	**Register as a student with CPA Ontario**	**Log into the Practical Experience Reporting Tool (PERT)[1] using your CPA Ontario student ID number.**	**Create or update your profile in PERT** Select your experience path: **Pre-Approved Program (PPR)** A. Update PERT profile B. Create an experience report C. Await employment confirmation **Experience Verification Route (EVR)** A. Update PERT profile B. Create an experience report C. Request pre-assessment	**Get ready to start reporting in PERT** A. After successful completion of step 3, your status in PERT will change to: "In progress." B. The Practical Experience Requirement (PER) "effective date" will be set when a CPA Ontario approved mentor is confirmed on your profile. C. You will receive an email with next steps after employment confirmation or pre-assessment is approved so that you can begin reporting PE.	**Report Practical Experience in PERT**	**Reporting the end of your co-op term** Request a mentor review and profession assessment to complete your PE review.

Second option:

Wait to register as a student with CPA Ontario until employed on a full time basis post-graduation and then claim your co-op terms as prior experience. Students with CPA Ontario are eligible to claim up to 12 months of experience from the previous five and a half years (three and a half years for the external audit stream). Note: It is recommended that students maintain contact information of their program manager and/or supervisor so experience can be signed off at a later date. Otherwise, students will assume the risk that experience cannot be verified by the employer and, therefore, will be ineligible for recognition by CPA Ontario.

1   https://secure.cpaontario.ca/PERT/Login/Login

1 REGISTER AS A STUDENT WITH CPA ONTARIO

How to register as a student with CPA Ontario:

a. Check Schedule A in Regulation 9-1[1]: Student Registration to determine if your school is listed as an approved co-op program.
b. Contact your school's Registrar's office to determine if they are working directly with CPA Ontario to facilitate the student registration process.

If your school is listed as an approved co-op program and its Registrar's office is working directly with CPA Ontario:

- Your post-secondary institution will collect the relevant information from you to get the process started.

- Your post-secondary institution will then provide CPA Ontario with your contact information along with proof of enrolment in the co-op program.

- CPA Ontario will create an initial record using your contact information and will assign you a CPA Ontario student ID number.

- Once this has been created, you will be sent an email providing instructions on how to go online and register as a student.

- Visit the CPA Ontario registration portal[2]

  - Complete the online form. Select registration category B2 "Co-operative degree program" on this form as the basis of your application.
  - In section G of the registration form, select the Cooperative Fee category.

- You will receive an email in 10 business days from CPA Ontario to confirm your registration has been processed.

If your school is listed as an approved co-op program, but its Registrar's office is not working directly with CPA Ontario:

- First step to register as a student with CPA Ontario is by completing and submitting the Creating an Account form[3] to transcriptregistration@cpaontario.ca.

- You will receive an email containing a link and login information to the online student registration portal[4] within 10 business days.

- Log in using the CPA Ontario ID provided. You will be prompted to create a password.

- Select registration category B2 "co-operative degree program" on this form as the basis of your application.

- In section G of the registration form, select the Cooperative Fee category.

- You will receive an email in 10 business days from CPA Ontario to confirm your registration has been processed.

If your school is not listed as an approved co-op program:

- First step to conditionally register as a student with CPA Ontario is by completing and submitting the Creating an Account form[3] to transcriptregistration@cpaontario.ca.

- You will receive an email containing a link and login information to the online student registration portal[4] within 10 business days.

- Log in using the CPA Ontario ID provided. You will be prompted to create a password.

- Select registration category "B.8 Conditional" as the basis of your application.

- In section G of the registration form, depending on the date of your application, select the category other than the Undergraduate Co-operative Degree category .

- CPA Ontario will contact you for proof of enrolment in a post-secondary institution.

- Once proof of enrolment has been received, you will receive an email in 10 business days from CPA Ontario to confirm your registration has been processed.

- You will receive an email in 10 business days from CPA Ontario to confirm your registration has been processed.

2 LOG IN TO THE PRACTICAL EXPERIENCE REPORTING TOOL

Log in to PERT

Visit the PERT login[5] page.

If you have trouble accessing your account, please contact customerservice@cpaontario.ca

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1   https://media.cpaontario.ca/stewardship-of-the-profession/pdfs/Regulation-9-1.pdf
2   https://www.cpaontario.ca/register
3   https://www.cpaontario.ca/createaccount
4   https://www.cpaontario.ca/register

5   https://secure.cpaontario.ca/PERT/Login/Login.aspx?ReturnUrl=%2fPERT%2fGoPert%2findex.aspx

3 CREATE OR UPDATE YOUR PROFILE IN THE PRACTICAL EXPERIENCE REPORTING TOOL

1. If this is your first time logging in to the Practical Experience Reporting Tool (PERT), create a PERT profile. If you are a returning student, please update your PERT profile to indicate your experience path:

    a. Pre-Approved Program (PPR):

        i. Update your PERT profile to "PPR". Update information about the organization, location and program name, including your mentor's email address.

        ii. Create an experience report – it is important to immediately create an experience report including the job start date so employment can be confirmed.

        iii. Await employment confirmation – the program manager receives an automated email when a student indicates employment in a PPR. The program manager must log in to PERT to confirm employment. Until employment is confirmed, the student's PER status will be "Pending Enrolment." PPR students are not required to submit a pre-assessment.

    b. Experience Verification Route (EVR):

        i. Update your PERT profile to EVR and input your mentor's email address if possible.

        ii. Create an experience report – a student must create an experience report and attach their job description. The job description must be on company letterhead. For the pre-assessment stage, no technical or enabling competencies should be completed. Please ensure that the experience report start date reflects the job start date. Once the job description is attached, save and close the experience report.

        iii. Submit pre-assessment - A student with an EVR profile must submit a pre-assessment to have their job reviewed by CPA Ontario. Go to the "Profession Assessment" tab and select "Request Pre-assessment." Please allow 4 to 6 weeks for pre-assessment to be reviewed by CPA Ontario.

4 GET READY TO START REPORTING IN THE PRACTICAL EXPERIENCE REPORTING TOOL

After successful completion of Step 3, your status in the Practical Experience Reporting Tool (PERT) will change to "In progress." You are now ready to start reporting your experience in PERT.

- Please confirm that the Practical Experience Requirements (PER) effective date has been set. For more information on the PER effective date, please see *PER Effective Date Fact Sheet*[6].

- Students have 90 days from their employment start date to submit their employment information for pre-assessment in the Experience Verification Route or be confirmed in the Pre-Approved Program by the program manager. If this is not done, students risk being assigned a PER effective date that is different from their job start date.

5 REPORT PRACTICAL EXPERIENCE IN THE PRACTICAL EXPERIENCE REPORTING TOOL

- Students are required to log in to the Practical Experience Reporting Tool (PERT) semi-annually to complete an experience report, and to self assess their technical and enabling competency development.

    - If your co-op term is less than 7 months, you are encouraged to complete an experience report and meet with your mentor at the end of each co-op term.

    - If your co-op term is between 8 to 12 months, you are encouraged to complete an experience report and meet with your mentor at least twice during this period.

- Students should create an experience report with co-op start and end date, and update their technical and enabling competencies developed during the term.

    - Depending on your PER effective date, the reports required may be both a "Prior" and "Current" report, or only a "Prior" or only a "Current" report. See *PER Effective Date Fact Sheet*[6].

- If you are a student with a Pre-Approved Program (PPR) profile and working in external audit, you are required to attach a signed chargeable hours form[7] to your experience report in PERT.

- Once the report is updated, the report must be set to "Verified" status as CPA Ontario will only review experience reports in a verified status.

    - For students with a PPR profile – Select "Submit" on the report details tab to change the status of the report to "Verified."

    - For students with an Experience Verification Route (EVR) profile – Select "Submit" on the report details tab to send a request to your supervisor to complete the verification request by verifying the position duties in your report. The status of the experience report will remain as "Verification Requested" until your supervisor completes this verification.

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6   https://media.cpaontario.ca/become-a-cpa/complete-your-designation/pdfs/Practical%20 Experience%20Requirements%20(PER)%20Effective%20Date.pdf

7   https://media.cpaontario.ca/become-a-cpa/pdfs/Form-ER019.pdf

6 REPORTING THE END OF YOUR CO-OP TERM

Requesting a mentor review is highly recommended

- CPA Ontario highly recommends that students complete a mentor review during each co-op term.
- To request a mentor review, all experience reports must be updated and be in "Verified" status.
- Select the "Mentor Reviews" tab and then "Request Mentor Review."
- Meet with your mentor.
- The mentor must log in to the Practical Experience Reporting Tool (PERT) and mark the mentor review as completed.

Request a profession assessment

- Only "Verified" reports are reviewed by CPA Ontario.
- Go to the "Profession Assessment" tab and request a profession assessment. Select the assessment reason "Change of Job Assessment" and, in the input field, include "co-op returning to school".
  - If you are a student with a Pre-Approved Program (PPR) profile, select "Program Leader" from the drop down menu and select "Save". As a student, the Program Leader must first sign off on your experience report before it will be reviewed by CPA Ontario.
- Once received by CPA Ontario, please allow 6 weeks to complete the assessment.
- You will be notified by email from PERT once your assessment is complete.
- CPA Ontario will change your Practical Experience Requirements (PER) status from " In Progress" to "Unemployed" to indicate that you have returned to school.
- In the next co-op term, you would update your PERT profile indicating the PPR or Experience Verification Route (EVR) experience path and repeat step 4 onwards.

Things to keep in mind:

- It is recommended that you complete a mentor review while on your co-op term. Students are required to complete two mentor reviews over a 12 month period of employment. For more information, please consult CPA Practical Experience Requirements[8].
- Students on their first co-op term are likely only to develop one or two technical competencies depending on the length of the role. It is unlikely that a co-op term would provide enough exposure to develop enabling competencies to level 2 proficiency. Please keep this in mind when updating experience reports. For guidance on proficiency and competency development, please see page 3 of the CPA Practical Experience Requirements[9].
- Ensure the "Leaves Taken" field is updated in PERT and reflects any time taken away from the job during your co-op term.
- Students are required to notify CPA Ontario of any job change within three months of the change occurring, including returning to school after a co-op term.

8   https://www.cpaontario.ca/become-a-cpa/complete-your-designation/practical-experience/requirements
9   https://media.cpaontario.ca/become-a-cpa/pdfs/Practical-Experience-Requirements.pdf