CHARTERED
PROFESSIONAL
ACCOUNTANTS

PERT User Guide

Pre-approved Program Leader

Effective January 2016

CPA provincial/ regional bodies	CPA PER contact information
CPA Alberta	Email: practicalexperience@cpaalberta.ca Phone: 403.269.5341
CPA Atlantic Region	Email: practicalexperience@cpaatlantic.ca Phone: 902.429.4494
CPA British Columbia	Email: • PER/PERT inquiries: cpabcper@bccpa.ca • Mentor inquiries: Mentor@bccpa.ca Phone: 604.872.7222
CPA Canada — International	Email: ryim@cpacanada.ca Phone: 604.605.5084
CPA Manitoba	Email: practicalexperience@cpamb.ca Phone: 204.943.1538
CPA Ontario	Email: practicalexperience@cpaontario.ca Phone: 416.962.1841 or 1.800.387.0735
Ordre des comptables professionnels agréés du Québec	Email : Stages@cpaquebec.ca Phone: 1.800.363.4688 [2615]
CPA Saskatchewan	Email: practicalexperience@cpask.ca Phone: 306.359.0272
CPA Canada Toronto Head Office	Email: member.services@cpacanada.ca Phone: 416.977.0748 or 1.800.268.3793

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1 Introduction to PERT

The CPA Practical Experience Reporting Tool (PERT) helps future CPAs document the development of their technical and enabling competencies in order for them to be assessed and recognized by the profession.

The PERT User Guide outlines how to use the PERT, and provides further guidance on how Pre-approved Program Leaders (PPL) can view future CPAs' experience reports in order to prepare for meetings, and to document these meetings in PERT.

Pre-approved Program Leader Role

Each Pre-approved Program is the responsibility of a designated PPL, who must be a CPA in good standing with a provincial/regional body.

The PPL is accountable to the provincial/regional body for ensuring future CPAs gain experience through the organization's pre-approved program(s).

PPLs are also responsible for liaising with the designated CPA mentors to confirm the following future CPA activities have occurred:

- Future CPAs have discussed their progress with their CPA mentors at least semi-annually
- Future CPAs are meeting the progression expectations of the CPA Pre-Approved Program.

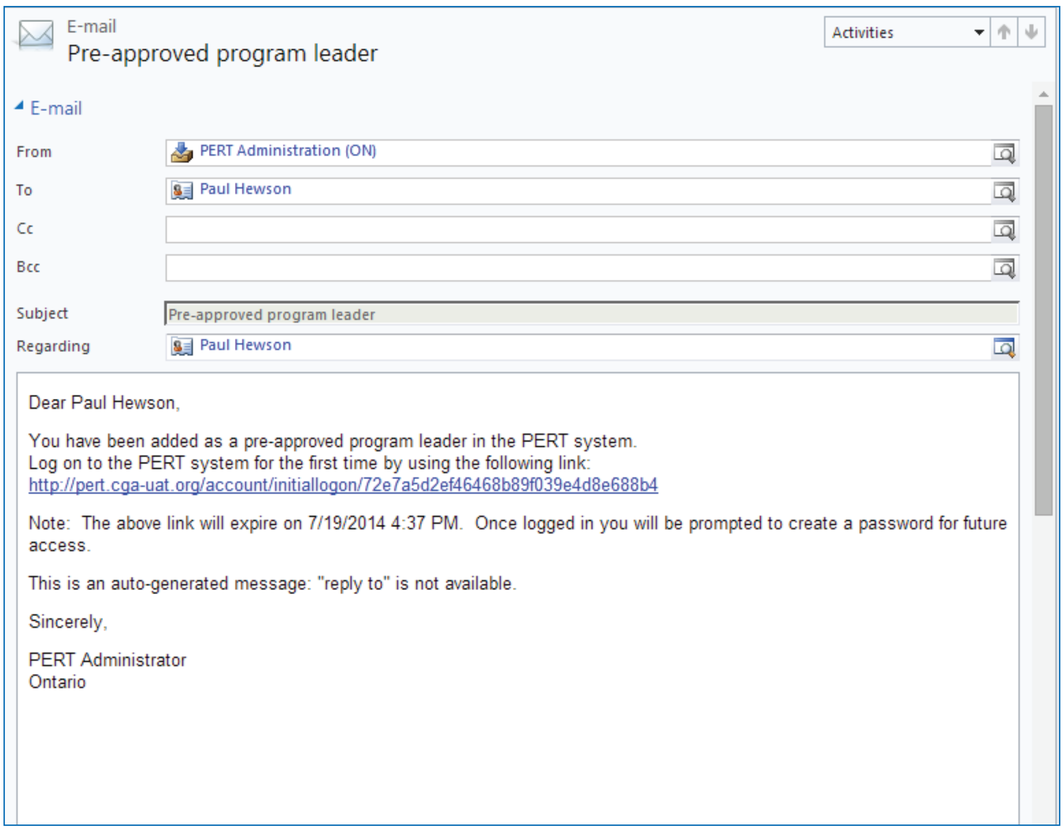
Furthermore, the PPL must provide the provincial/regional body with a certification signoff for all future CPAs who complete their experience requirement or who depart the pre-approved program during their training period.

2 PERT Logon

Create Your Password

To create your password for the first time, follow these steps.

1. From the confirmation email, click the link to log on to the PERT. The *Create Your Password* screen appears.



E-mail
Pre-approved program leader

Activities

E-mail

From: PERT Administration (ON)
To: Paul Hewson
Cc:
Bcc:
Subject: Pre-approved program leader
Regarding: Paul Hewson

Dear Paul Hewson,

You have been added as a pre-approved program leader in the PERT system.
Log on to the PERT system for the first time by using the following link:
http://pert.cga-uat.org/account/initiallogon/72e7a5d2ef46468b89f039e4d8e688b4

Note: The above link will expire on 7/19/2014 4:37 PM. Once logged in you will be prompted to create a password for future access.

This is an auto-generated message: "reply to" is not available.

Sincerely,

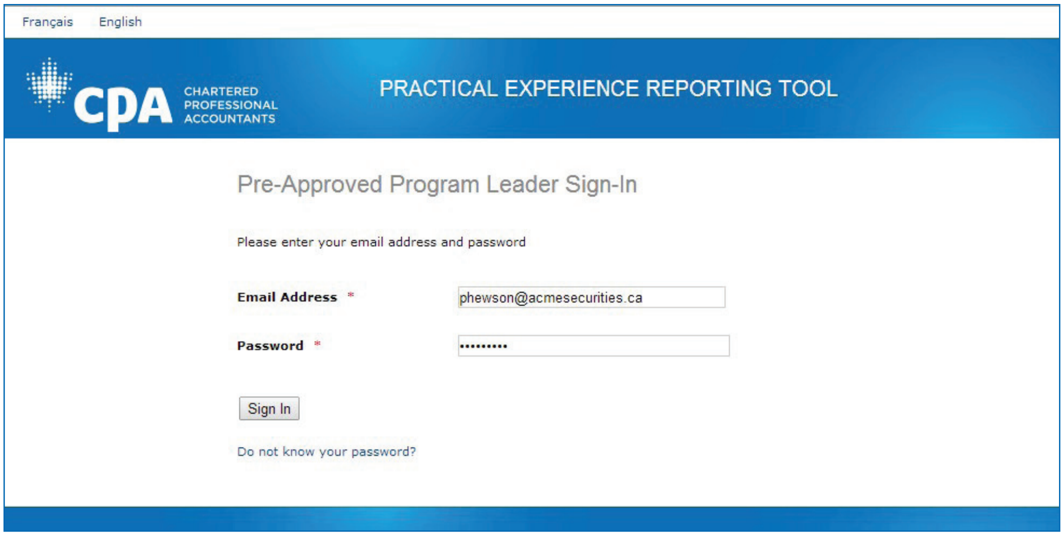
PERT Administrator
Ontario

2. Enter and confirm your new password.

   Note: Passwords are required to be a minimum of six characters in length, and must have at least one letter and at least one number.

3. Click **Create Password**. If you are successful in creating your password, you will be prompted to sign-in to PERT.

Sign in



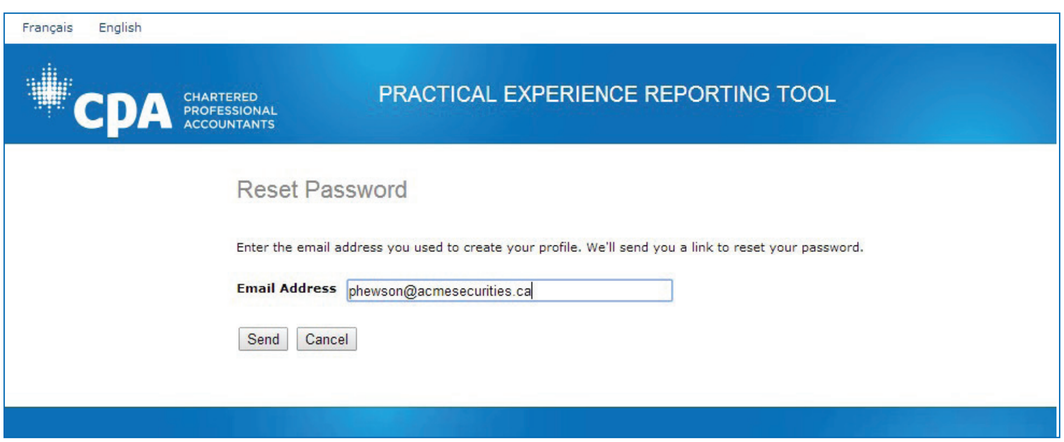
1. To sign in, enter your **Email Address** and **Password.**
2. Click **Sign In** to access the PERT.

Note: The URL to log in as a PPL, is https://pert.cpa-services.org/DevelopmentLeader/Logon.

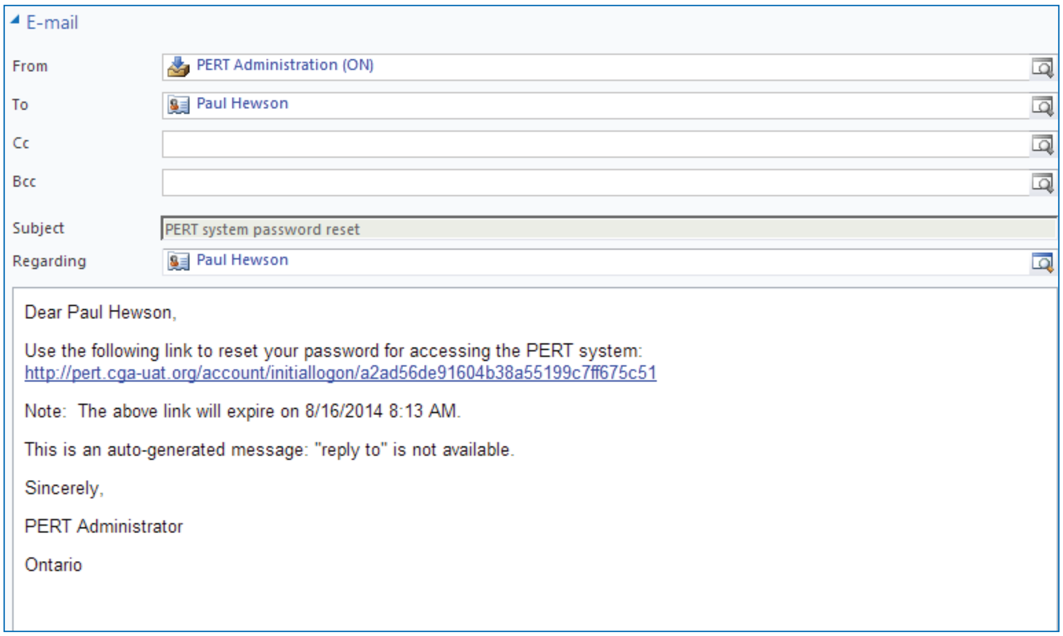
Reset Password

If you need to reset your password, follow these steps.

1. From the *Pre-approved Program Leader Sign-In* screen, click **Do not know your password**. The *Reset Password* screen appears.



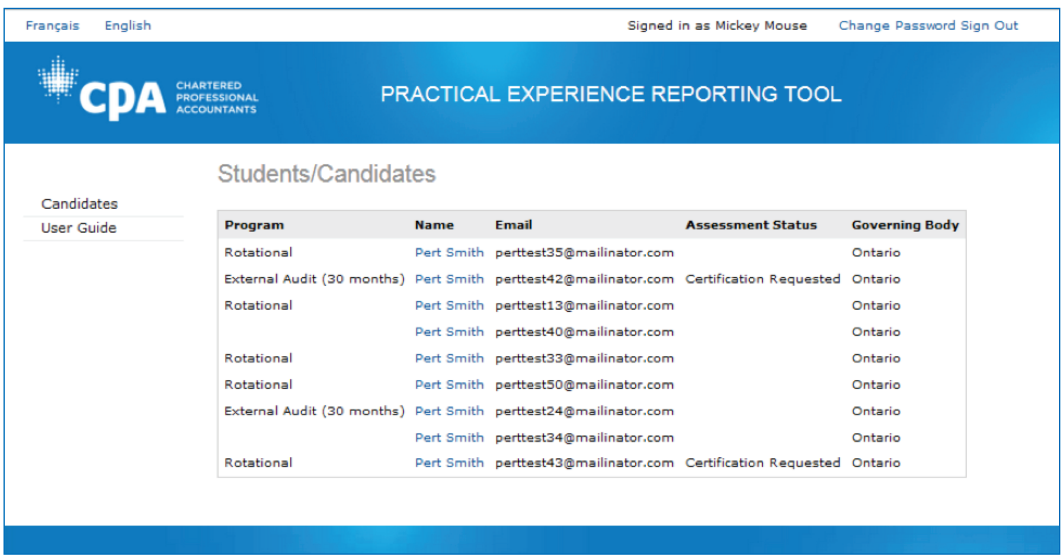
2. Enter the email address you provided at the time of registration for your CPA pre-approved program.
3. Click **Send**. The *Reset Password* screen displays confirming that an email has been sent for you to reset your password.
4. Close this screen and check your email for the password reset message.
5. Within the email message, click the link to reset your password.



3 Candidate Details

As a PERT Pre-approved Program Leader, you are able to view the details of the students/candidates in your pre-approved program(s) that have requested an assessment. Students/candidates request assessments when they are departing your program or are ready for certification.

You will **NOT** see a full roster of students/candidates in your program; only those who have requested an assessment.



Français English Signed in as Mickey Mouse Change Password Sign Out

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL

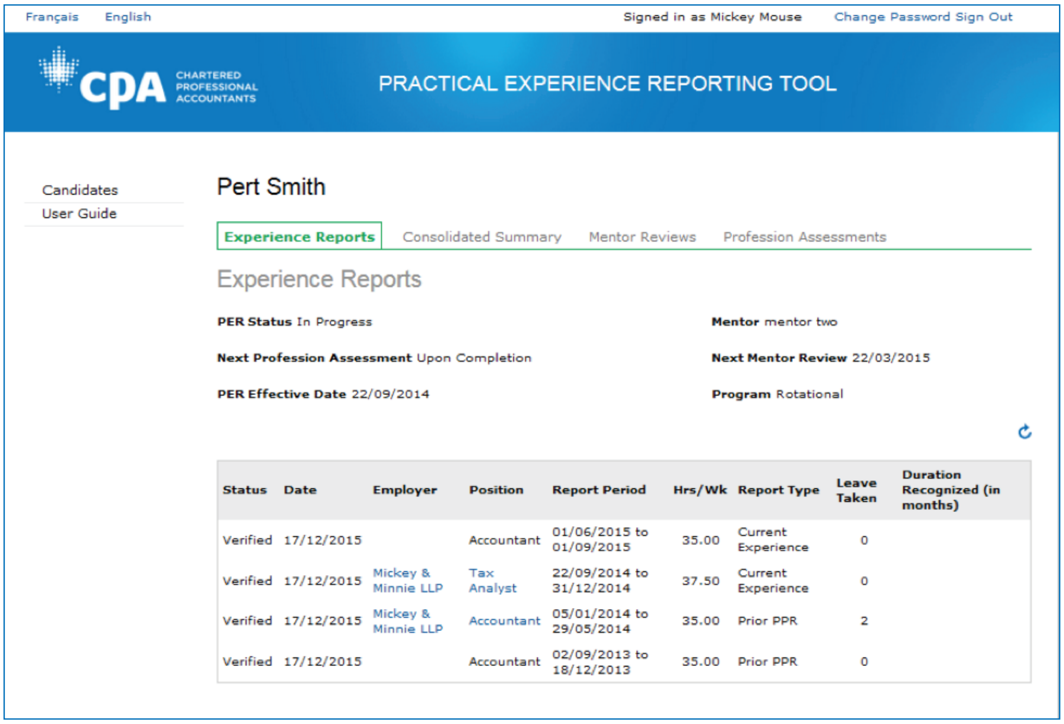
Candidates

User Guide

Students/Candidates

Program	Name	Email	Assessment Status	Governing Body
Rotational	Pert Smith	perttest35@mailinator.com		Ontario
External Audit (30 months)	Pert Smith	perttest42@mailinator.com	Certification Requested	Ontario
Rotational	Pert Smith	perttest13@mailinator.com		Ontario
	Pert Smith	perttest40@mailinator.com		Ontario
Rotational	Pert Smith	perttest33@mailinator.com		Ontario
Rotational	Pert Smith	perttest50@mailinator.com		Ontario
External Audit (30 months)	Pert Smith	perttest24@mailinator.com		Ontario
	Pert Smith	perttest34@mailinator.com		Ontario
Rotational	Pert Smith	perttest43@mailinator.com	Certification Requested	Ontario

To view candidate detail, click the candidate's name.



Status	Date	Employer	Position	Report Period	Hrs/Wk	Report Type	Leave Taken	Duration Recognized (in months)
Verified	17/12/2015		Accountant	01/06/2015 to 01/09/2015	35.00	Current Experience	0	
Verified	17/12/2015	Mickey & Minnie LLP	Tax Analyst	22/09/2014 to 31/12/2014	37.50	Current Experience	0	
Verified	17/12/2015	Mickey & Minnie LLP	Accountant	05/01/2014 to 29/05/2014	35.00	Prior PPR	2	
Verified	17/12/2015		Accountant	02/09/2013 to 18/12/2013	35.00	Prior PPR	0	

The details associated with the candidate's *PER Status, Next Professional Assessment, Mentor* and *Next Mentor Review* are set by the profession and are displayed for your information only.

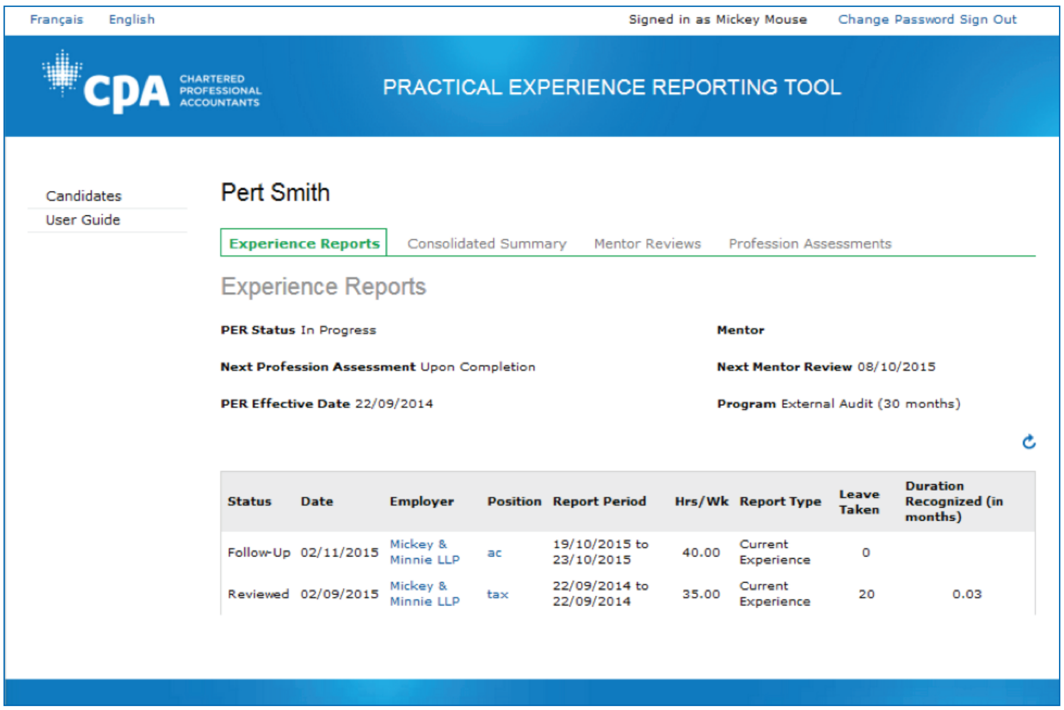
The **Status** information indicates the current status of the future CPAs Experience Report(s). All reports should be in a verified status when the student/candidate is requesting a profession assessment.

As a PPL, you have access to any experience reports from your pre-approved program. Catch up reports and those from other employers will not be accessible due to privacy and confidentiality concerns.

In the example above, the *Employer* field is blank and *Position* is not active.

In the following example, all Experience Reports are accessible since they are from the pre-approved program.

- To view employer details, click the name of the organization in the *Employer* column.
- To view details of the candidate's position, click the title in the *Position* column.

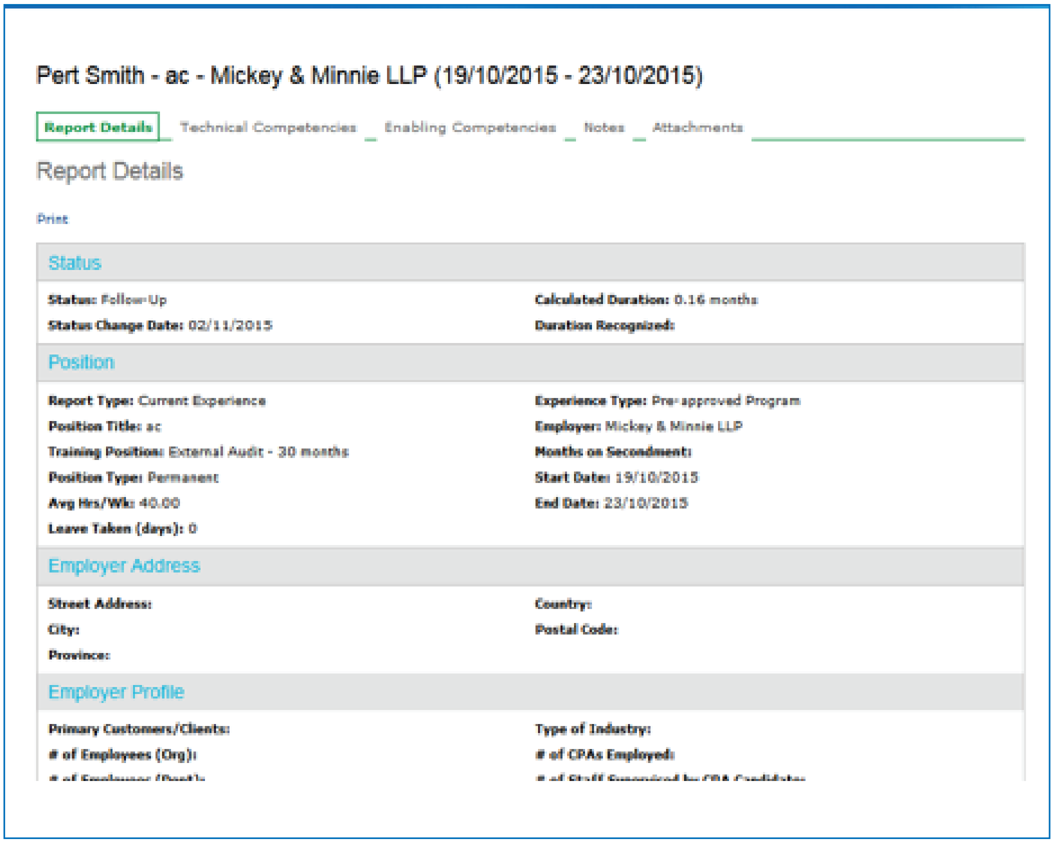


4 Experience Reports

As a Pre-approved Program Leader, you should review experience reports for completeness, accuracy and reasonability. Therefore, the following section is for information purposes only. It provides an overview of a future CPA's experience report and the associated processes for review and assessment.

While you may not need this information on a day-to-day basis, it is a useful reference.

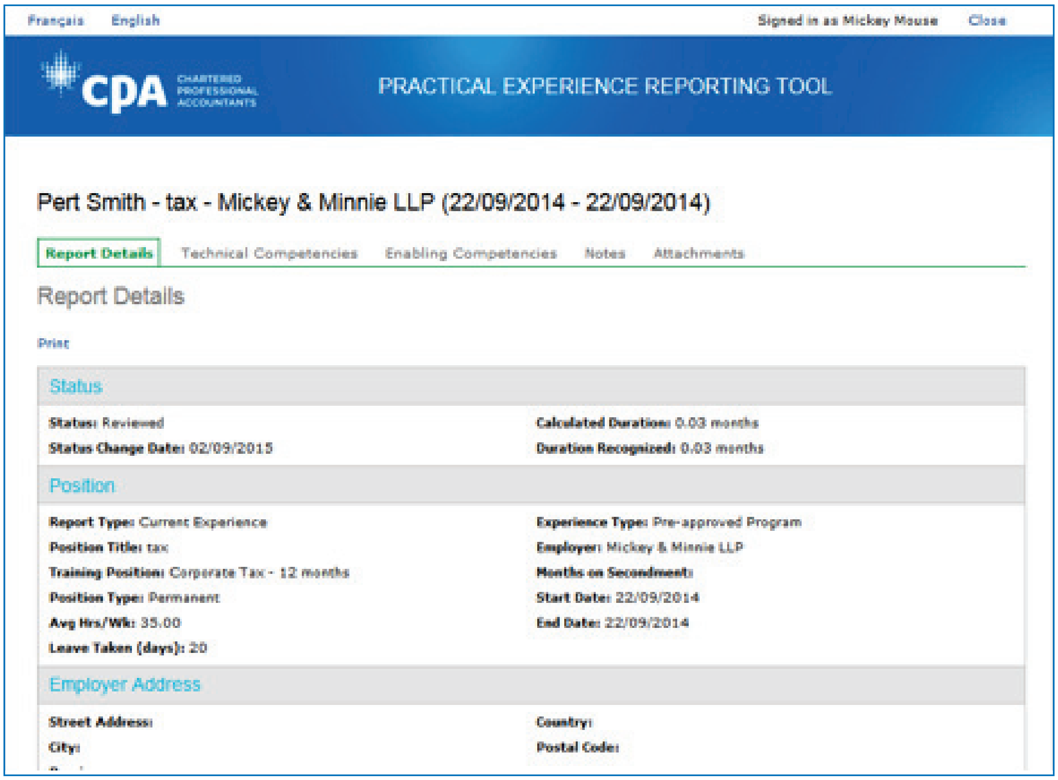
To view the details of an experience report, click the *Report Details* tab.



As a PPL, you will not be able to edit experience reports; however, you are able to view or print them.

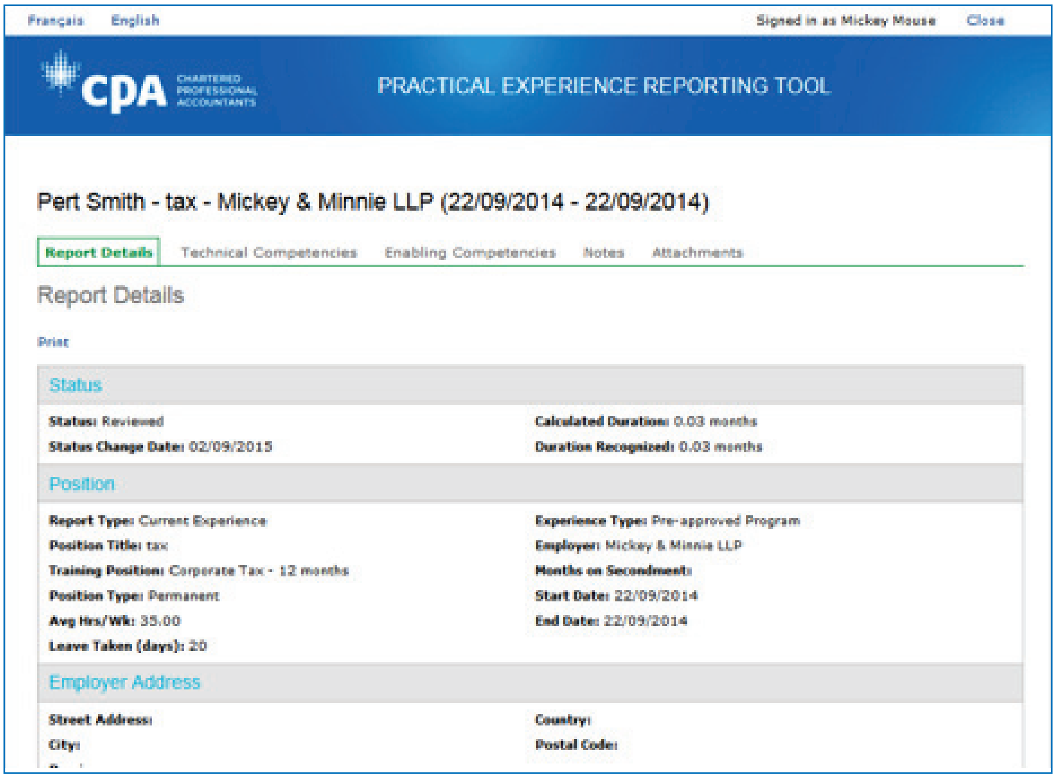
Status

The *Status* section displays read only information related to *Experience Report Status, Status Change Date, Calculated Duration* and *Duration Recognized* (if the report has been approved by a CPA Reviewer).



Position

The *Position* section displays read only details associated with the position held by the candidate.

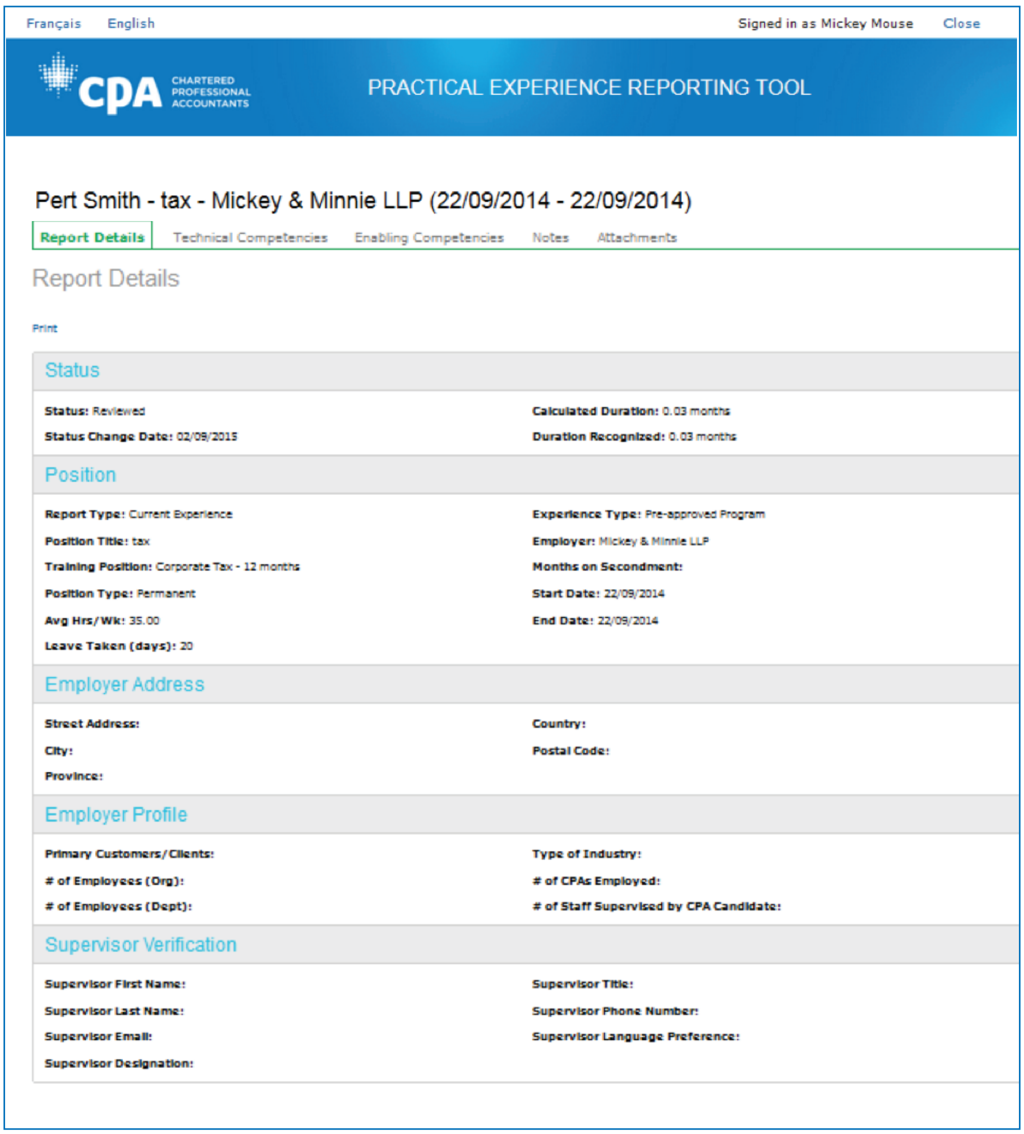


Supervisor Verification

The *Supervisor Verification* section includes Supervisor details, as well as Supervisor Verification details, if the experience report was verified

The majority of pre-approved programs will not require Supervisor verification.

Please contact your provincial representative if you would like to learn more about this feature and how it could work in your pre-approved program.



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CPA CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Pert Smith - tax - Mickey & Minnie LLP (22/09/2014 - 22/09/2014)

Report Details | Technical Competencies | Enabling Competencies | Notes | Attachments

Report Details

Print

Status

Status: Reviewed
Status Change Date: 02/09/2015
Calculated Duration: 0.03 months
Duration Recognized: 0.03 months

Position

Report Type: Current Experience
Position Title: tax
Training Position: Corporate Tax - 12 months
Position Type: Permanent
Avg Hrs/Wk: 35.00
Leave Taken (days): 20
Experience Type: Pre-approved Program
Employer: Mickey & Minnie LLP
Months on Secondment:
Start Date: 22/09/2014
End Date: 22/09/2014

Employer Address

Street Address:
City:
Province:
Country:
Postal Code:

Employer Profile

Primary Customers/Clients:
# of Employees (Org):
# of Employees (Dept):
Type of Industry:
# of CPAs Employed:
# of Staff Supervised by CPA Candidate:

Supervisor Verification

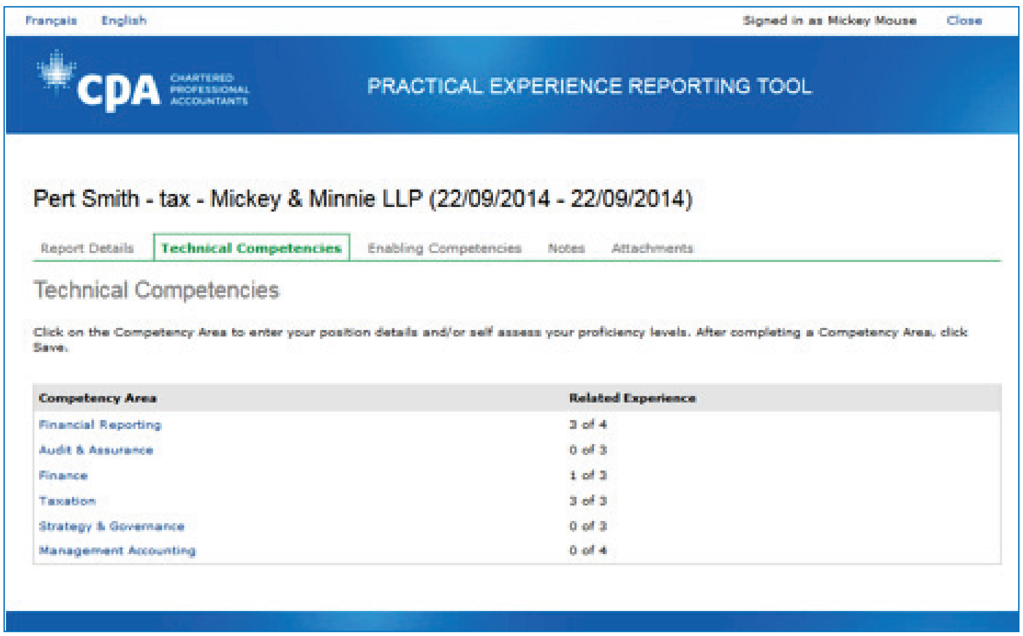
Supervisor First Name:
Supervisor Last Name:
Supervisor Email:
Supervisor Designation:
Supervisor Title:
Supervisor Phone Number:
Supervisor Language Preference:

Technical Competencies

As a Pre-approved Program Leader, you are expected to attest to the factual accuracy of the technical competency development. Any fatal flaw concerns should be discussed with the CPA student/candidate's CPA mentor. The CPA mentor may then choose to document any discrepancies that you raised in their *Mentor Review* section of PERT.

To view the future CPA's self-assessment of technical competency development during the reporting period, follow these steps.

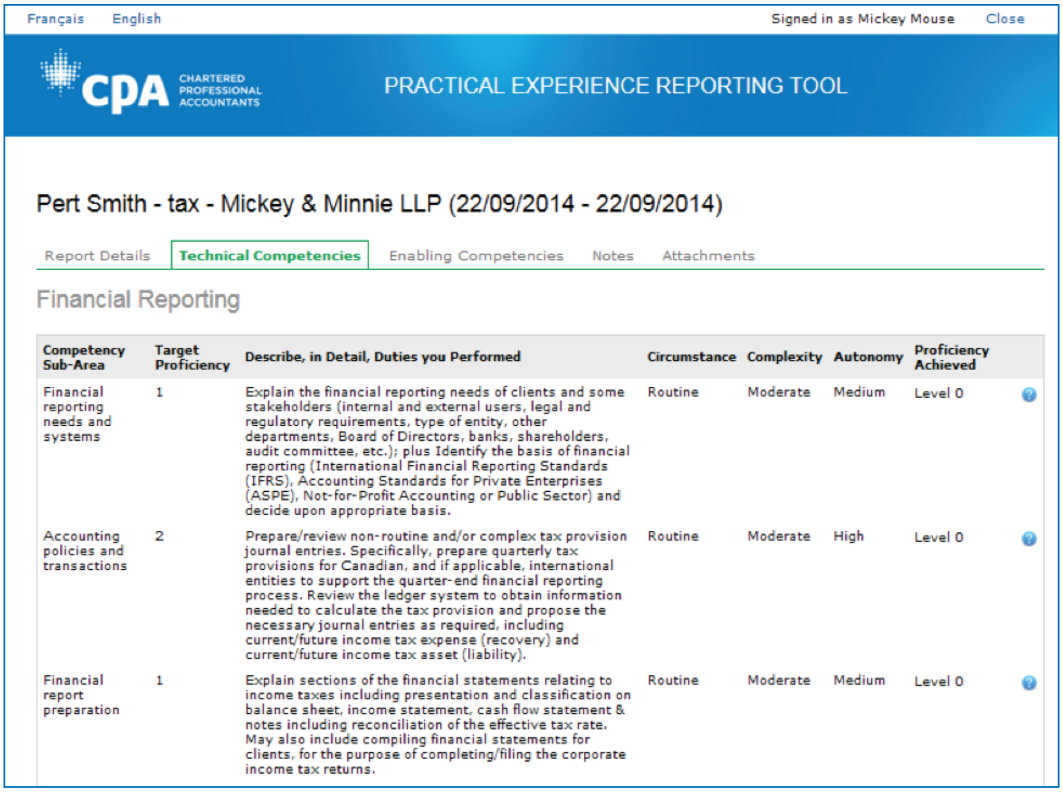
1. Click the **Technical Competencies** tab.



2. Click any of the six technical competency areas.

The details of the reported technical competency are displayed, which includes the various competency sub-areas, a description of the job duties relevant to the sub-area, the future CPA's assessment of the proficiency achieved.

The *Target Proficiency* column displays the proficiency level that the future CPA aims to achieve by the end of the period of practical experience. The *Proficiency Achieved* displays the current level of proficiency in which the future CPA assesses themselves to have achieved.



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CPA CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Pert Smith - tax - Mickey & Minnie LLP (22/09/2014 - 22/09/2014)

Report Details | **Technical Competencies** | Enabling Competencies | Notes | Attachments

Financial Reporting

Competency Sub-Area	Target Proficiency	Describe, in Detail, Duties you Performed	Circumstance	Complexity	Autonomy	Proficiency Achieved
Financial reporting needs and systems	1	Explain the financial reporting needs of clients and some stakeholders (internal and external users, legal and regulatory requirements, type of entity, other departments, Board of Directors, banks, shareholders, audit committee, etc.); plus Identify the basis of financial reporting (International Financial Reporting Standards (IFRS), Accounting Standards for Private Enterprises (ASPE), Not-for-Profit Accounting or Public Sector) and decide upon appropriate basis.	Routine	Moderate	Medium	Level 0
Accounting policies and transactions	2	Prepare/review non-routine and/or complex tax provision journal entries. Specifically, prepare quarterly tax provisions for Canadian, and if applicable, international entities to support the quarter-end financial reporting process. Review the ledger system to obtain information needed to calculate the tax provision and propose the necessary journal entries as required, including current/future income tax expense (recovery) and current/future income tax asset (liability).	Routine	Moderate	High	Level 0
Financial report preparation	1	Explain sections of the financial statements relating to income taxes including presentation and classification on balance sheet, income statement, cash flow statement & notes including reconciliation of the effective tax rate. May also include compiling financial statements for clients, for the purpose of completing/filing the corporate income tax returns.	Routine	Moderate	Medium	Level 0

Enabling Competencies

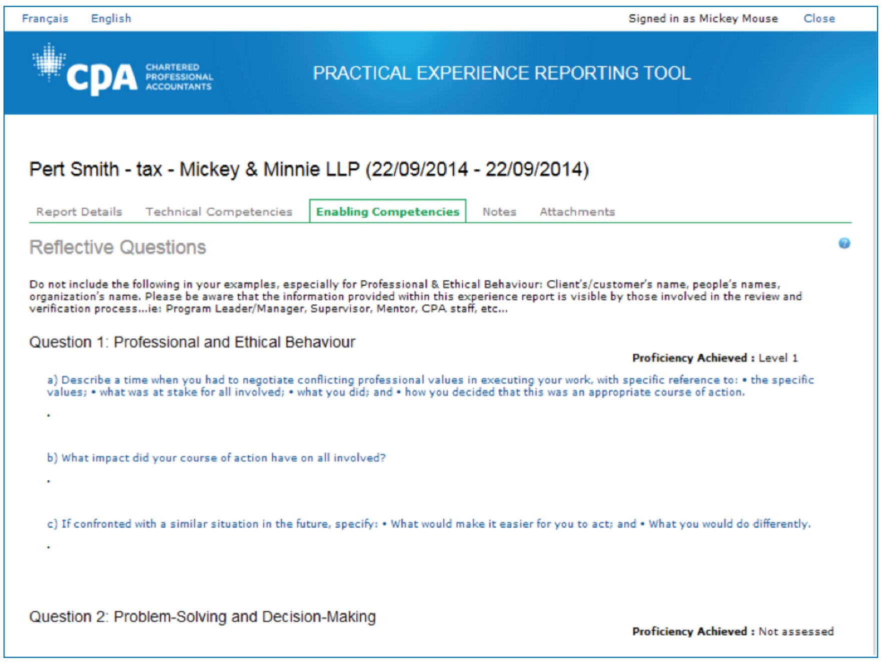
The enabling competency development is to be discussed and reviewed by the CPA student/candidate and their CPA mentor on a semi annual basis.

To view the future CPA's self-assessment of enabling competency development during the reporting period, click the **Enabling Competencies** tab. The *Reflective Questions* screen appears.

If you have specific concerns around the development of a competency area, you should discuss them with the CPA student/candidate's CPA mentor. The CPA mentor may then choose to document any discrepancies that you raised in their *Mentor Review* section of PERT.

Reflective Questions

The future CPA is not required to answer all enabling competency questions, but only those that pertain to the competencies developed in the reporting period.


Français English Signed in as Mickey Mouse Close

PRACTICAL EXPERIENCE REPORTING TOOL

Pert Smith - tax - Mickey & Minnie LLP (22/09/2014 - 22/09/2014)

Report Details | Technical Competencies | **Enabling Competencies** | Notes | Attachments

Reflective Questions

Do not include the following in your examples, especially for Professional & Ethical Behaviour: Client's/customer's name, people's names, organization's name. Please be aware that the information provided within this experience report is visible by those involved in the review and verification process...ie: Program Leader/Manager, Supervisor, Mentor, CPA staff, etc...

Question 1: Professional and Ethical Behaviour

Proficiency Achieved : Level 1

a) Describe a time when you had to negotiate conflicting professional values in executing your work, with specific reference to: • the specific values; • what was at stake for all involved; • what you did; and • how you decided that this was an appropriate course of action.

b) What impact did your course of action have on all involved?

c) If confronted with a similar situation in the future, specify: • What would make it easier for you to act; and • What you would do differently.

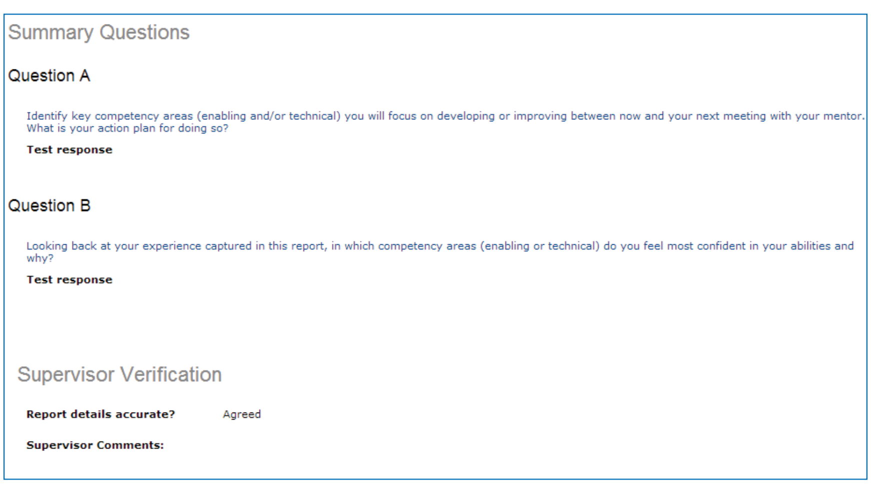
Question 2: Problem-Solving and Decision-Making

Proficiency Achieved : Not assessed

Summary Questions

Future CPAs are required to answer both Summary questions, irrespective of how many enabling competencies they achieved during the period.

Question A is important in allowing future CPAs to set specific development targets between the meetings with their CPA mentors.


Summary Questions

Question A

Identify key competency areas (enabling and/or technical) you will focus on developing or improving between now and your next meeting with your mentor. What is your action plan for doing so?

Test response

Question B

Looking back at your experience captured in this report, in which competency areas (enabling or technical) do you feel most confident in your abilities and why?

Test response

Supervisor Verification

Report details accurate? Agreed

Supervisor Comments:

Notes

The *Notes* tab contains all the status changes of the experience reports, as well as any notes entered by CPA reviewers and/or CPA mentors. It is important as a program leader to review the contents of this area.

Attachments

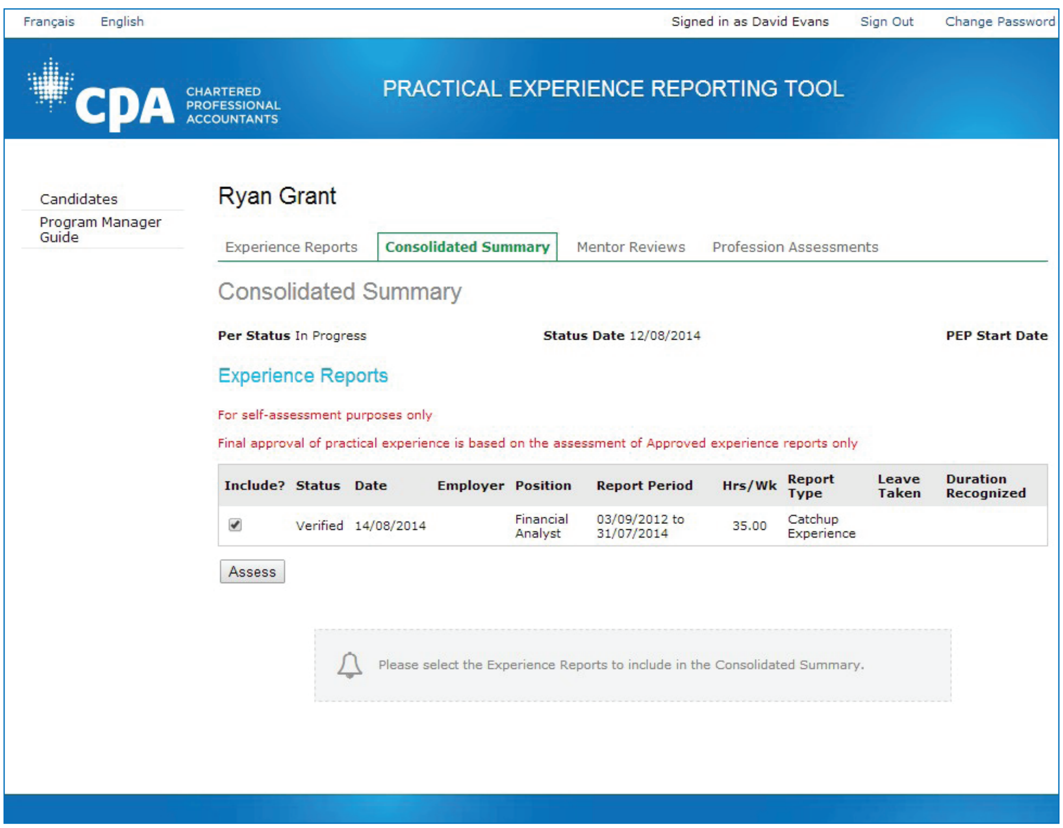
Future CPAs are able to attach files, such as resumes or job descriptions, to their experience reports. To view the attached files, follow these steps.

1. Click the **Attachments** tab.

2. To review an attached file, click **Choose File.**

5 Consolidated Summary

Pre-approved Program Leaders should use the information in the *Consolidated Summary* section to view the overall progress of a future CPA. This feature is particularly useful when a future CPA has multiple employment/experience reports.



Select the experience reports to be included in the consolidated summary and click **Assess**. Only verified reports should be included. (It may take a few moments for the summary to appear.)

Duration Requirement

Reported Leave	0 weeks		*20 allowable leave weeks*
Duration Required	30 months		*30 months (adjusted for leave in excess of allowance)*

Recognized Practical Experience

Prior Experience	0 months		*Maximum of 12 months recognized prior experience*
Current experience - Prior to PEP Start Date	22.91 months		
Current experience - After PEP Start Date	0 months		*Minumum of 12 months must be AFTER PEP start date*
Total Recognized Duration	22.91 months	Not Met	*Must meet or exceed Duration Required*

Competency Assessment

Enabling	Not Met	*All 5 enabling competencies at Level 2*
Technical		
Breadth	Not Met	*Overall, 8 competencies at Level 1 or greater with at least 4 at Level 2*
Depth	Not Met	*All competencies within at least one area; at least two must be at Level 2*
Core	Not Met	*At least 3 competencies at Level 1 in either Financial Reporting and/or Management Accounting*

Duration Requirement

The *Duration Requirement* section provides an overview of the number leave weeks reported by the future CPA, and the projected *Duration Required* adjusted for the leave weeks taken in excess of the 20 weeks allowance.
A leave includes time away from work for such reasons as vacation, sickness, professional development, and/or study time.

Duration Requirement

Reported Leave	22 weeks		*20 allowable leave weeks*
Duration Required	30.5 months		*30 months (adjusted for leave in excess of allowance)*
Prior Experience	0 months		*Maximum of 12 months recognized prior experience*
Current experience - Prior to PEP Start Date	22.91 months		
Current experience - After PEP Start Date	0 months		*Minumum of 12 months must be AFTER PEP start date*
Total Recognized Duration	22.91 months	Not Met	*Must meet or exceed Duration Required*

Competency Assessment

Enabling	Not Met	*All 5 enabling competencies at Level 2*
Technical		
Breadth	Not Met	*Overall, 8 competencies at Level 1 or greater with at least 4 at Level 2*
Depth	Not Met	*All competencies within at least one area; at least two must be at Level 2*
Core	Not Met	*At least 3 competencies at Level 1 in either Financial Reporting and/or Management Accounting*

In this example, the future CPA has taken 22 weeks of leave, and will be required to complete a duration of 30.5 months.

Recognized Practical Experience

The *Recognized Practical Experience* section provides an overview of the recognized practical experience completed by the future CPA. It is separated by *Prior Experience* and *Current Experience*. Current experience is experience accumulated after a CPA student/candidate's Practical Experience Requirement (PER) effective date. Prior experience is any experience accumulated prior to the PER effective date. A CPA student/candidate is eligible to claim up to 12 months of prior experience.

Duration Requirement

Reported Leave	0 weeks		*20 allowable leave weeks*
Duration Required	30 months		*30 months (adjusted for leave in excess of allowance)*

Recognized Practical Experience

Prior Experience	0 months		*Maximum of 12 months recognized prior experience*
Current experience - Prior to PEP Start Date	0 months		
Current experience - After PEP Start Date	30.98 months		*Minumum of 12 months must be AFTER PEP start date*
Total Recognized Duration	30.98 months	Met	*Must meet or exceed Duration Required*

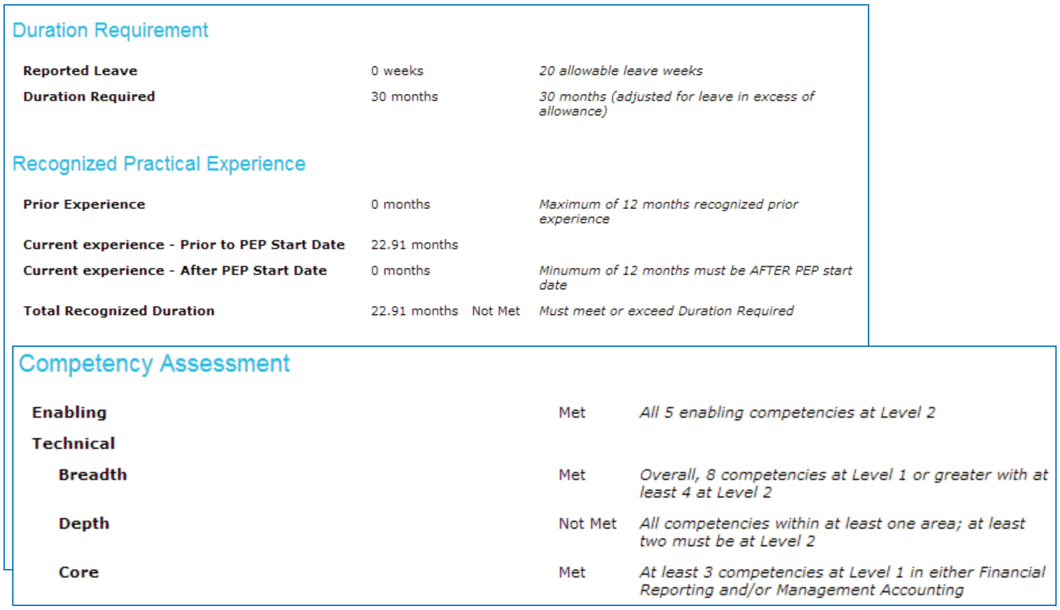
Competency Assessment

Enabling	Not Met	*All 5 enabling competencies at Level 2*
Technical		
Breadth	Not Met	*Overall, 8 competencies at Level 1 or greater with at least 4 at Level 2*
Depth	Not Met	*All competencies within at least one area; at least two must be at Level 2*
Core	Not Met	*At least 3 competencies at Level 1 in either Financial Reporting and/or Management Accounting*

The summary indicates whether the future CPA has met the required duration.

Competency Assessment

The *Competency Assessment* section indicates whether the future CPA has met the specified technical and enabling competency requirements.

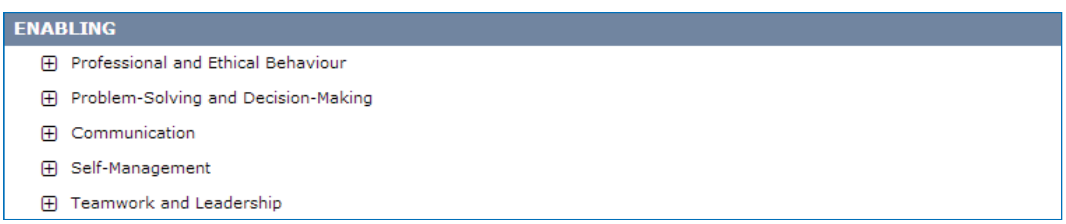


In this scenario, the future CPA has met all of the technical and enabling competency requirements barring the *Depth* requirement.

Enabling Competencies

To view more information on the details of the enabling competencies within the consolidated summary, follow these steps.

1. Click **Enabling**. The list of enabling competencies appear.



2. For a detailed view, select an enabling competency. The detailed view appears and provides a summary of the future CPA's responses, proficiency attained, duration and status.

Note: While the *Position* field contains active links, these only open to empty pages within PERT.

Technical Competencies

To view more information on the details of the technical competencies within the consolidated summary, follow these steps.

1. Click **Technical**. The list of technical competencies and sub-competencies appear.

TECHNICAL	
Financial Reporting	
⊞ Financial reporting needs and systems	Level 2
⊞ Accounting policies and transactions	Level 2
⊞ Financial report preparation	Level 2
⊞ Financial statement analysis	Level 2
Audit & Assurance	
⊞ Internal control	Level 2
⊞ Internal audit or external assurance requirements, basis and risk assessment	Level 0
⊞ Internal audit projects or external assurance engagements	Level 0
Finance	
⊞ Financial analysis & planning	Level 0
⊞ Treasury management	Level 0
⊞ Capital budgeting, Valuation, Corporate finance	Level 0
Taxation	
⊞ Income tax legislation and research	Level 0
⊞ Tax compliance: corporate or personal	Level 0
⊞ Tax planning: corporate or personal	Level 2
Strategy & Governance	
⊞ Governance Mission, vision, values & mandate	Level 2
⊞ Strategy development / implementation	Level 0
⊞ Enterprise risk management	Level 2
Management Accounting	
⊞ Management reporting needs and systems	Level 0
⊞ Planning, budgeting and forecasting	Level 0
⊞ Cost / revenue / profitability management	Level 0
⊞ Organizational / individual performance measurement	Level 0

2. For a detailed view, select a technical sub-competency.

TECHNICAL

Financial Reporting

⊟ Financial reporting needs and systems — Level 2

Position	Position Duties	Circumstance	Complexity	Autonomy	Target Proficiency	Proficiency Attained	Duration	Status
Audit Associate	Liaise with the External Reporting department to understand the required information for external reporting purposes, if applicable. The CA Student mu...	NonRoutine	Moderate	Medium	Level 1	Level 0	6	Approved
Audit Associate	Liaise with the External Reporting department to understand the required information for external reporting purposes, if applicable. The CA Student mu...	NonRoutine	Moderate	Medium	Level 1	Level 2	24.98	Approved

⊞ Accounting policies and transactions — Level 2

⊞ Financial report preparation — Level 2

⊞ Financial statement analysis — Level 2

The detailed view of the technical competency appears, and provides a summary of future CPA responses, position duties, circumstance, complexity, autonomy, target proficiency, proficiency attained, duration, and status. Please review the proficiency achieved for overall reasonability given time spent in the role and work completed.

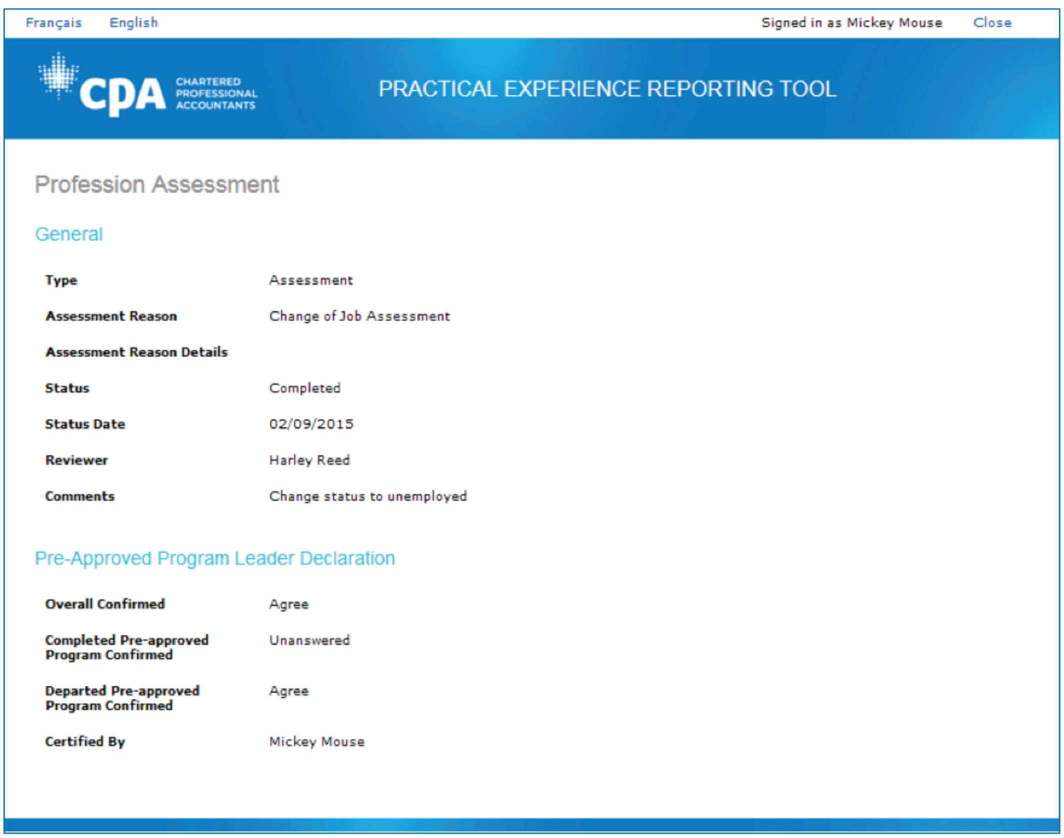
Note: While the *Position* filed contains active links, these only open to empty pages within PERT.

6 Profession Assessments

Assessments

The *Profession Assessments* tab displays any professional assessments requested by the CPA student/candidate.

By clicking on the *Status Date* link you can find out further information about the profession assessment and the CPA reviewer comments.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CPA CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Profession Assessment

General

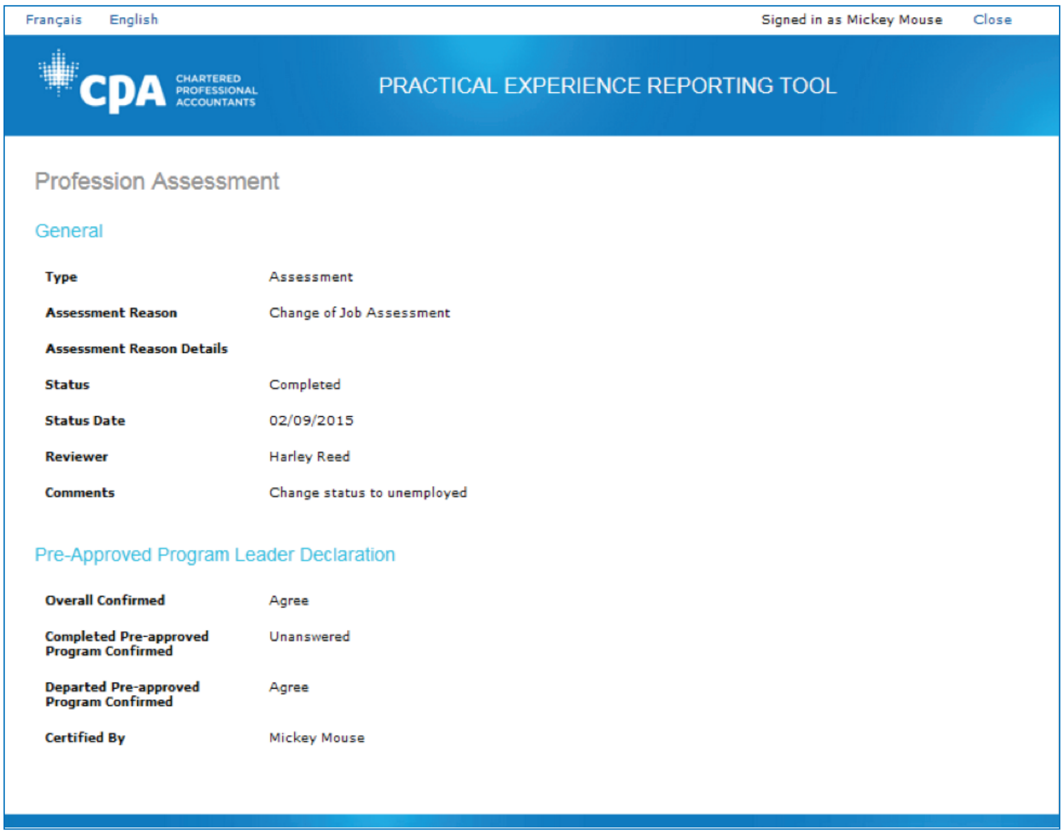
Type	Assessment
Assessment Reason	Change of Job Assessment
Assessment Reason Details	
Status	Completed
Status Date	02/09/2015
Reviewer	Harley Reed
Comments	Change status to unemployed

Pre-Approved Program Leader Declaration

Overall Confirmed	Agree
Completed Pre-approved Program Confirmed	Unanswered
Departed Pre-approved Program Confirmed	Agree
Certified By	Mickey Mouse

Assessment Detail

Keep in mind that CPA students/candidates will request an assessment when they are departing your program before completing the qualifying period or when they have completed the required duration.


Français English Signed in as Mickey Mouse Close

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL

Profession Assessment

General

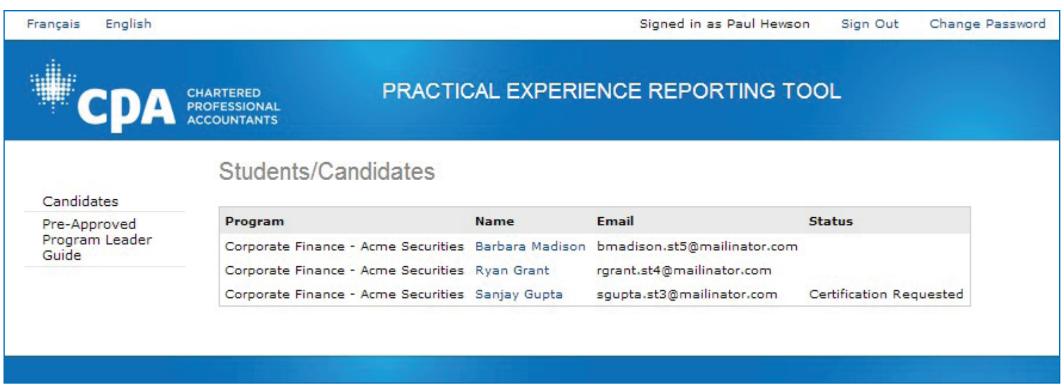
Type	Assessment
Assessment Reason	Change of Job Assessment
Assessment Reason Details	
Status	Completed
Status Date	02/09/2015
Reviewer	Harley Reed
Comments	Change status to unemployed

Pre-Approved Program Leader Declaration

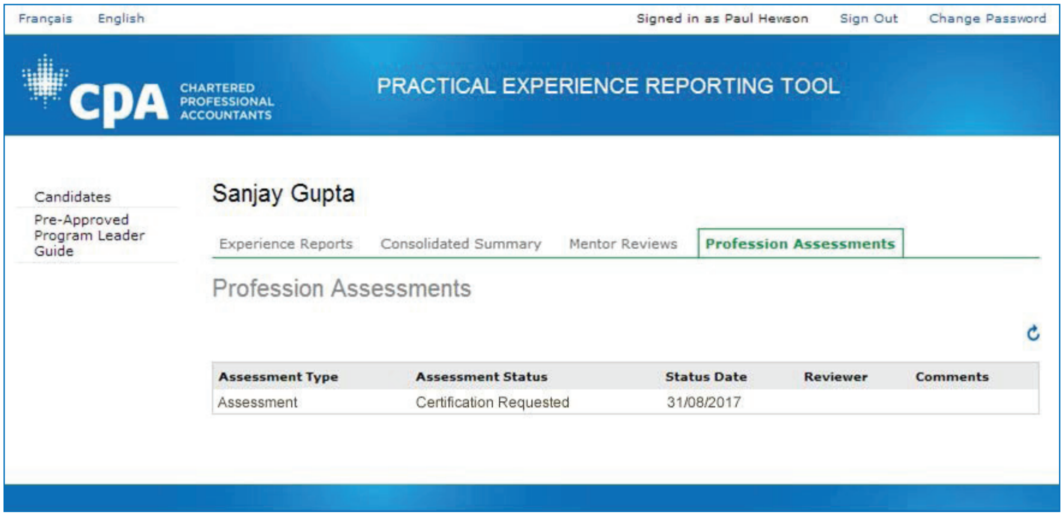
Overall Confirmed	Agree
Completed Pre-approved Program Confirmed	Unanswered
Departed Pre-approved Program Confirmed	Agree
Certified By	Mickey Mouse

7 Certification Requested

When future CPAs believe they have completed all of the practical experience requirements or they are departing your pre-approved program, they can request a *Certification Requested* profession assessment. Unlike other profession assessments, the Pre-approved Program Leaders are required to confirm that the future CPAs have met all of the requirements. Although it is the Program Leader’s responsibility to declare whether the experience reports are accurate, including verifying time away from work and that the mentor review meetings have occurred, Program Leaders can use their discretion to delegate the verification of this task to their respective Program Managers.



To view the candidate's details, click the name of the candidate.

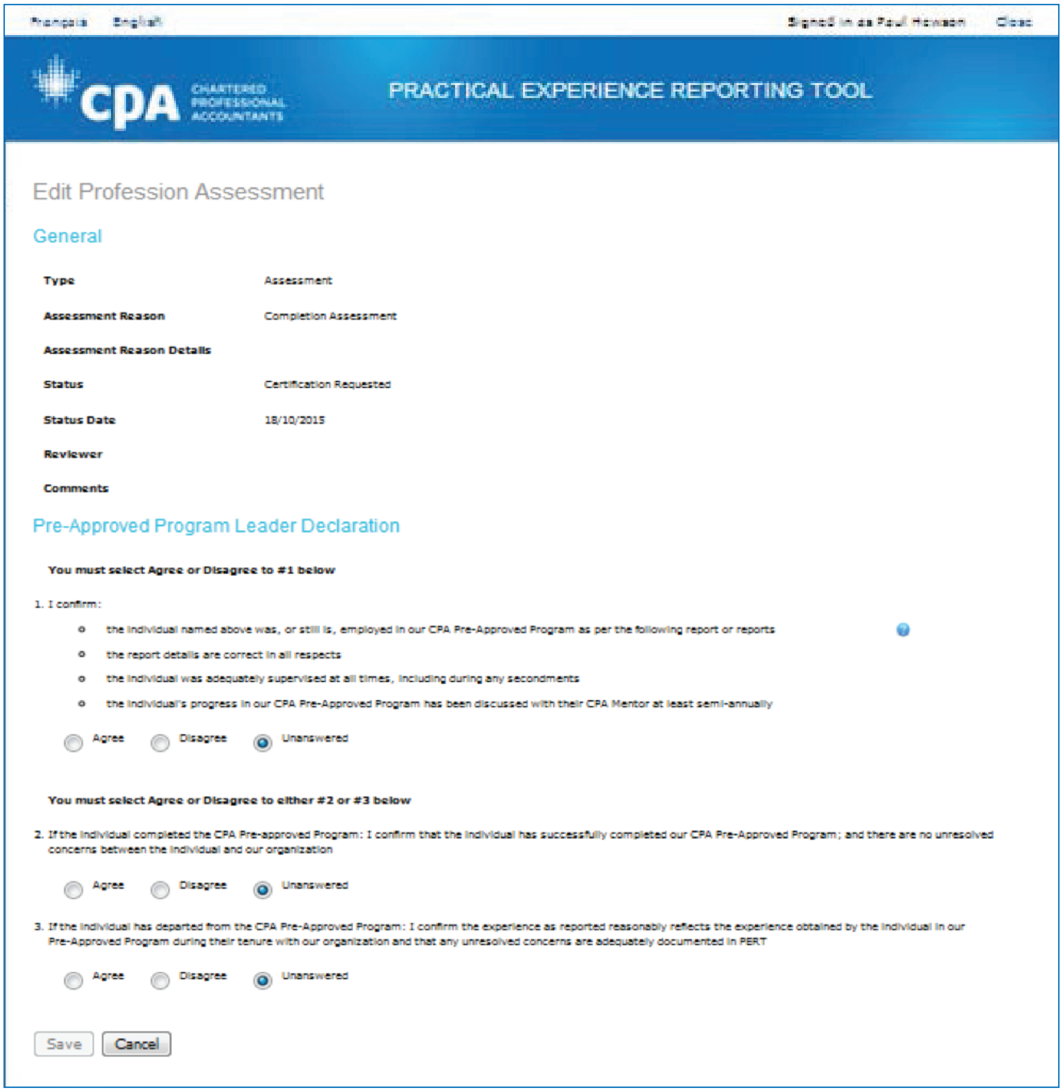


Information on how a Pre-approved Program Leader provides Certification that future CPAs have completed part, or all, of the Pre-approved Program, will be provided shortly.

Profession Assessment

To view details of the assessment, click the associated **Status Date**.

To make your declaration to confirm that the candidate completed their duration, click **Edit** to enter details. The *Edit Profession Assessment* screen appears.



General

The *General* section displays details of the *Profession Assessment* requested.

Pre-approved Program Leader Declaration

As a Pre-approved Program Leader, you must confirm if all of the future CPA's experience reports are accurate and has the minimum required CPA mentor reviews.


Pre-Approved Program Leader Declaration

You must select Agree or Disagree to #1 below

1. I confirm:
   - the individual named above was, or still is, employed in our CPA Pre-Approved Program as per the following report or reports
   - the report details are correct in all respects
   - the individual was adequately supervised at all times, including during any secondments
   - the individual's progress in our CPA Pre-Approved Program has been discussed with their CPA Mentor at least semi-annually

Agree Disagree Unanswered

To make the declaration, select **Agree**. Otherwise, select **Disagree**.

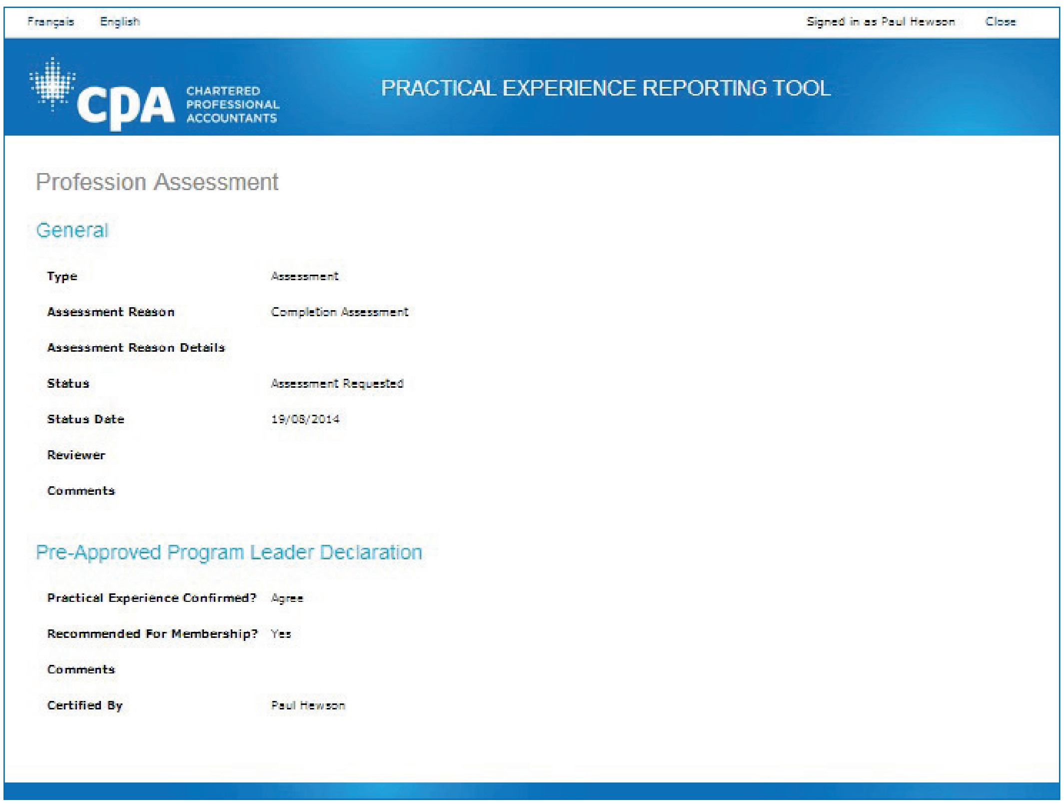
Recommendations

As the Pre-approved Program Leader, you will agree with #2 if the student/candidate has completed the entire qualifying period and is ready for certification.

If the student is departing from the pre-approved program prior to completion of the qualifying then select **Agree** for #3.

After making your selection, click **Save**.

The Profession Assessment is updated to include your edits.



To save your changes, click **Save**. The window can be closed.

Once the profession assessment declaration has been made, the assessment is submitted to the CPA provincial/regional body for review and approval. At this point, you are not required to conduct any additional tasks for this candidate.

CHARTERED
PROFESSIONAL
ACCOUNTANTS
CANADA

277 WELLINGTON STREET WEST
TORONTO, ON CANADA M5V 3H2
T. 416 977.3222 F. 416 977.8585
WWW.CPACANADA.CA