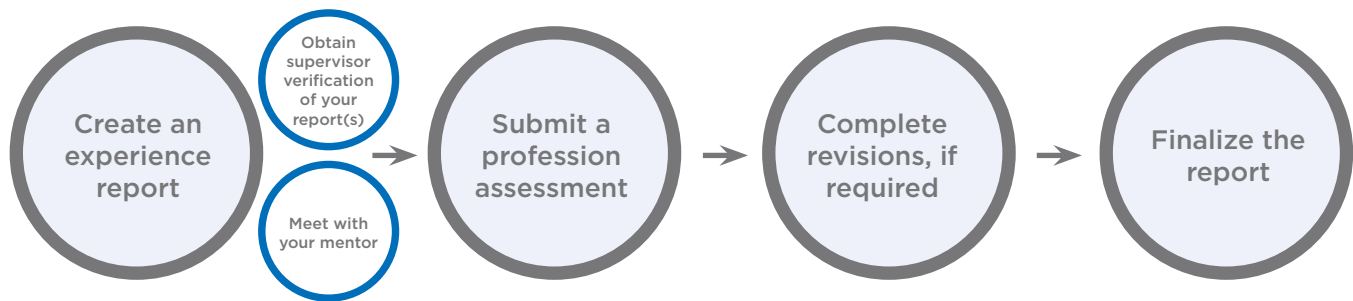


Completing Experience Verification Reports: A Guide

The Process



Create a current experience report that starts on your PER effective date.

Relevant work experience gained prior to this date can be captured in a prior experience report, but will be capped at 12 months.

Obtain supervisor verification of your report(s) and meet with your mentor semi-annually.

Then, request a profession assessment at the date specified in your assessment. At this point, the profession receives a request to assess any experience reports in a “verified” state.

Processing times can range between four to eight weeks.

To complete the assessment, the CPA profession may require you to make revisions to your duties or clarify your responsibilities.

You will have **one** opportunity to respond to our feedback. If you have not made the required changes within 30 days, then your profession assessment will be cancelled and your report will return to a “new” status.

To be eligible for another profession assessment, you will have to ask your supervisor to verify your report(s) again and you will lose your place in the queue.

Once you’ve made the changes requested by your reviewer, you will submit your report for supervisor verification again. After this is obtained, re-submit your profession assessment.

If your reviewer is satisfied with the changes, then he/she will set your report to a “reviewed” status, recognize duration, and complete your profession assessment. You will be provided with the date of your next profession assessment at this time. This date assumes you remain employed in your current position. You must request a profession assessment ahead of this date if you change positions or employers.

Checklist for completing an experience report

Are the competencies that you are claiming reasonable?

- **Does your job description support them?**

If you are in a Financial Analyst position, it would not be expected that you are developing the Audit & Assurance competencies. If you have done a special project to gain competencies outside of your normal responsibilities, note this clearly in your response.

- **Are you claiming the right amount and are they at the right level?**

Students/candidates only need to achieve eight (8) competencies overall, with four (4) of them at a level 2, in a minimum of 30 months (and a maximum of 7 years) of practical experience. Typically, after 12 months of employment, we would only expect to see someone claiming three to four competencies, with most at a level 1. If a student/candidate has significant prior experience or an extremely robust position, then it may be possible for him/her to achieve atypical results within 12 months.

For more information on the core, depth, breadth, and progression requirements of the program, see the [CPA PER](#).

- **Have you claimed the same duty in more than one competency?**

Reviewers will check to see that each competency is supported by a unique set of position duties. Carefully review the competency requirements and examples that have been provided to see where your job duty best fits. See the blue question mark beside each sub competency in PERT, or see the [Competency Statements and Illustrative Examples](#).

Have you addressed all parts of the competency with appropriate examples?

- **For competencies with multiple parts, can your reviewer see which “or” statement you are targeting, or see that all “and” statements have been met?**

In order to achieve proficiency, you must demonstrate all parts of the competency as outlined, even at a level 1. If you do not meet all of the requirements of the competency, you will be assessed at a level 0.

- **Are your examples unique to your position and did they occur during the time period covered by your report?**

It is not sufficient to copy and paste the requirements or examples provided in PERT or the Competency Statements and Illustrative Examples in your position duties. If your report is a copy and paste, it will be returned to you for revision.

- To see a useful video that provides more guidance on how to complete your technical competency responses, [click here](#).

Have you demonstrated an in-depth understanding of the situation you are reporting on in your enabling competencies?

- One or two sentences are not sufficient to fully address the enabling questions. For example, section (a) of questions 1 and 2 have multiple parts. Following the CPA Way, where applicable, will help ensure your enabling competency responses are appropriate. You can find the CPA Way assessment rubric in PERT by clicking on the blue question mark next to the heading 'enabling competencies' in the Enabling Competencies tab.
- Section (c) of each question is intended to encourage you to reflect on your growth in that competency area. Identifying areas of weakness, as well as areas of strength, will help the reviewer see that you have considered your own professional growth and the implications of your actions.
- As you are completing your enabling competency responses, keep in mind that you only need to achieve level 2 proficiency by the completion of your term of practical experience. To see a useful video that provides more guidance on how to complete your enabling competency responses, [click here](#).

Is your style of communication professional and does it clearly demonstrate what you have accomplished?

- Remember that this is a formal report of your experience that is being submitted to the profession for assessment. You may be asked for revisions if your spelling and grammar are not at a professional level.
- The reviewer needs to understand from your description what you performed as an individual. Avoid using phrases such as “My team performed...”; “My company”; “I assisted with...”; or “I am able to...”. Please clearly state **what tasks you completed on your own**, even if your work was reviewed.

Have you reviewed your report with your mentor?

- We recommend that you review your report with your mentor during your semi-annual meetings before submitting a profession assessment. Any areas of concern with your report should be discussed with your mentor or supervisor as appropriate.