



# CPA Mentor Review User Guide

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# 1 Introduction

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.

After you setup your CPA Mentor profile in PERT, you will be expected to access PERT both before and after meeting with your future CPA(s) (also referred to as CPA students/candidates).

This user guide provides guidance on how to use PERT to access your future CPA(s) experience reports and document your required semi-annual meetings.

As a CPA Mentor, you are responsible for:

- meeting with your future CPAs at least semi-annually
- documenting your meetings in PERT once they have occurred. Recording the date you completed the meeting in PERT is critical in order for the profession to monitor compliance.
- documenting any unresolved development concerns in PERT

You are not expected to verify the factual accuracy on future CPAs experience reports.

For additional guidance on your roles and responsibilities as a CPA Mentor, please visit the [Centre for Mentoring Resources](#).



## 2 Experience Reports

Once you have logged into PERT, the homepage will appear and you will see a list of the future CPA(s) you are currently mentoring.

Franglais English Signed in as Cheryl Williams Change Password Sign Out

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS PRACTICAL EXPERIENCE REPORTING TOOL

Candidates/Students Under Mentorship

Name	Email	Status	PER Status	Governing Body	End Relationship
Pert Smith	perttest23@mailinator.com	Review Overdue	In Progress	Ontario	<input type="checkbox"/>
Pert Smith	perttest25@mailinator.com		In Progress	Ontario	<input type="checkbox"/>

End Selected Relationships

Profile  
Candidates  
User Guide - Editing a Profile  
User Guide - Mentor Meetings  
User Guide - Mentor 101 Fact Sheet  
Centre for Mentoring Resources

The *Status* column will display one of the following options:

- *Review Requested*: Indicating that a mentor review meeting has been requested by your future CPA. For more information on how to fulfill a review request, see *Chapter 7: CPA Mentor Reviews*.
- *Review Overdue*: Indicating that your scheduled mentor review meeting is overdue.

To view the experience report for your student/candidate, follow these steps.

1. Click the name of the student/candidate who has requested the mentor review meeting. A list of all the experience reports submitted by your student/candidate will appear.

The screenshot shows the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and user information (Signed in as Cheryl Williams, Change Password, Sign Out). The CPA logo and 'CHARTERED PROFESSIONAL ACCOUNTANTS' are on the left, and the title 'PRACTICAL EXPERIENCE REPORTING TOOL' is on the right. A navigation menu on the left includes Profile, Candidates, and various user guides. The main content area is for 'Pert Smith' and includes tabs for Experience Reports (selected), Consolidated Summary, Mentor Reviews, and Profession Assessments. Key information includes: PER Status In Progress, Mentor Cheryl Williams, Next Profession Assessment 11/2015, Next Mentor Review 23/05/2016, and PER Effective Date 20/11/2015. A table below shows a single experience report entry.

Status	Date	Employer	Position	Report Period	Hrs/Wk	Report Type	Leave Taken	Duration Recognized (in months)
Verified	22/02/2016	abc	a	03/12/2014 to 31/12/2014	40.00	Current Experience	0	

**Note:** The information in the *Status* column displays the status of the future CPAs' experience report. As a CPA Mentor, you should focus on report(s) with a *Verified* status only. To review your student/candidate's report click on the *Employer Name* or *Position* which will take you to report details.

2. To review the details of your student/candidate's experience report, click on the Employer Name or Position which will take you to report details.



## Experience Report Details

Experience report details are separated into different sections.

Report Details	
<a href="#">Report Details</a>   <a href="#">Technical Competencies</a>   <a href="#">Enabling Competencies</a>   <a href="#">Notes</a>   <a href="#">Attachments</a>	
Print   Copy	
<b>Status</b>	
<b>Status:</b> Reviewed <b>Status Change Date:</b> 26/01/2016	<b>Calculated Duration:</b> 1.55 months <b>Duration Recognized:</b> 1.55 months
<b>Position</b>	
<b>Report Type:</b> Current Experience <b>Position Title:</b> Accountant <b>Training Position:</b> External Audit - 30 months <b>Position Type:</b> Co-op <b>Avg Hrs/Wk:</b> 35.00 <b>Leave Taken (days):</b> 0	<b>Experience Type:</b> Pre-approved Program <b>Employer:</b> Mickey & Minnie LLP <b>Months on Secondment:</b> <b>Start Date:</b> 15/10/2015 <b>End Date:</b> 30/11/2015
<b>Employer Address</b>	
<b>Street Address:</b> <b>City:</b> <b>Province:</b>	<b>Country:</b> <b>Postal Code:</b>
<b>Employer Profile</b>	
<b>Primary Customers/Clients:</b> <b># of Employees (Org):</b> <b># of Employees (Dept):</b>	<b>Type of Industry:</b> <b># of CPAs Employed:</b> <b># of Staff Supervised by CPA Candidate:</b>
<b>Supervisor Verification</b>	
<b>Supervisor First Name:</b> <b>Supervisor Last Name:</b> <b>Supervisor Email:</b> <b>Supervisor Designation:</b>	<b>Supervisor Title:</b> <b>Supervisor Phone Number:</b> <b>Supervisor Language Preference:</b>

Sections	Report Details
Status	<p>This section displays read only information related to experience report's Status, Status Change Date, Calculated Duration and Duration Recognized (if the report has been approved by a CPA Reviewer).</p> <ul style="list-style-type: none"> <li>• <i>Calculated Duration</i>: The overall period of the time recorded in the experience report.</li> <li>• <i>Duration Recognized</i>: The period of time that will count towards the 30-month minimum period of practical experience, as this is the period that has been recognized by the profession.</li> </ul>
Position	<p>This section displays read only details associated with the position held by the candidate, including:</p> <ul style="list-style-type: none"> <li>• <i>Report Type</i>: Indicating whether the report recognizes current or prior experience.</li> <li>• <i>Avg Hrs/Wk</i>: Denoting the average weekly hours worked by the future CPA during this experience report.</li> <li>• <i>Experience Type</i>: Indicating whether the future CPA is enrolled in the experience verification route or pre-approved program route.</li> </ul>
Employer Address	<p>For pre-approved programs, the employer address, employer profiles and Supervisor verification sections are normally blank.</p>
Employer Profile	<p>This section provides a high level overview about your future CPA's employer, including industry, and number of employees. This information is useful in determining the complexity of the future CPAs role.</p>
Supervisor Verification	<p>This section provides details about the future CPA's Supervisor. It also indicates whether the Supervisor has verified the factual accuracy of the experience report and any comments or concerns they may have.</p> <p><b>Note:</b> Generally, the Supervisor only needs to verify the factual accuracy of the experience report for future CPAs in an experience verification route.</p>

# 3 Technical Competencies

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

1. From the homepage, click the name of the student/candidate.
2. Click the *Employer Name* or *Position*. New tabs are displayed.
3. Click the **Technical Competencies** tab.

The screenshot shows the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and a user login (Signed in as Cheryl Williams, Close). The main header includes the CPA logo and the text "PRACTICAL EXPERIENCE REPORTING TOOL". Below the header, there are navigation tabs: Report Details, **Technical Competencies**, Enabling Competencies, Notes, and Attachments. The main content area is titled "Technical Competencies" and includes a instruction: "Click on the Competency Area to enter your position details and/or self assess your proficiency levels. After completing a Competency Area, click Save." Below this is a table with two columns: "Competency Area" and "Related Experience".

Competency Area	Related Experience
Financial Reporting	1 of 4
Audit & Assurance	2 of 3
Finance	0 of 3
Taxation	0 of 3
Strategy & Governance	0 of 3
Management Accounting	0 of 4

For students/candidates in an experience verification route (EVR), the information in the *Verification* column indicates whether the future CPA's Supervisor agreed with the reported duties.

**Note:** EVR students/candidates must describe their position duties in their own words, whereas pre-approved program students/candidates have their position duties pre-populated. As a CPA Mentor, you are not expected to attest to the factual accuracy or the proficiency level of CPA students/candidates' technical competency development; however, you are expected to document any of your concerns.

4. 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, and the future CPA's assessment of the proficiency achieved.

The screenshot shows the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and a user login (Signed in as Cheryl Williams). The main header includes the CPA logo and the title 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below the header, there are navigation tabs: Report Details, Technical Competencies (highlighted), Enabling Competencies, Notes, and Attachments. The main content area is titled 'Financial Reporting' and includes an 'Add Note' button. A table displays the following data:

Competency Sub-Area	Target Proficiency	Describe, in Detail, Duties you Performed	Circumstance	Complexity	Autonomy	Proficiency Achieved
Financial reporting needs and systems	2	Identify the differing financial reporting needs of various stakeholders (external auditors, other departments, executive team, BOD, shareholders, audit committee etc.); plus reviewing if reported information to stakeholders is accurate and if its content meets their needs which includes evaluating the existing financial reporting structure (Hyperion systems - actual module) and developing or improving the reporting processes to facilitate this task. Evaluate source documents to ensure the integrity of financial reporting necessary for the forecast and analysis of the actuals. This would include understanding the controls, performing analytical review and/or following up on unusual results. May also include preparation of select reconciliations for consolidation	Routine	Moderate	High	Level 2

The *Target Proficiency* column displays the proficiency level that the future CPA aims to achieve by the end of the entire practical experience period. It is not mandatory for the students/candidates to meet the target proficiency prior to the 30 month duration for practical experience, but it is recommended as a useful planning tool.

The *Proficiency Achieved* displays the current level of proficiency in which the future CPA assesses themselves to have achieved.

If you have any concerns, document them in the *Mentor Review* section. For more information, see *Appendix A: Completing a Mentor Review*.

# 4 Enabling Competencies

Future CPAs track their enabling competency development by responding to five, three-part questions and two summary questions. They are not required to answer all enabling competency questions; only those that pertain to the competencies developed in the reporting period.

**Note:** Employers have access to review the five enabling competency answers.

You should discuss and review the enabling competency development with your student/candidate on a semi-annual basis.

## Reflective Questions

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

1. From the homepage, click on the name of the student/candidate.
2. Click the Employer name or position, new tabs are displayed.
3. Click the **Enabling Competencies** tab, The *Reflective Questions* screen appears.

The screenshot displays the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and a user login status (Signed in as Cheryl Williams, Close). The main header features the CPA logo (Chartered Professional Accountants) and the title "PRACTICAL EXPERIENCE REPORTING TOOL". Below the header, a navigation bar includes tabs for "Report Details", "Technical Competencies", "Enabling Competencies" (which is highlighted), "Notes", and "Attachments". The main content area is titled "Reflective Questions" and contains a warning message: "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...". Below this, there is an "Add Note" button and three questions listed with their corresponding proficiency status:

Question 1: Professional and Ethical Behaviour	Proficiency Achieved : Not assessed
Question 2: Problem-Solving and Decision-Making	Proficiency Achieved : Not assessed
Question 3: Communication	Proficiency Achieved : Not assessed

4. If you have any concerns document them in the Mentor Review section. For more information, see *Chapter 7: CPA Mentor Reviews*.

**Note:** Information you enter here will be visible to all PERT users with access to your student/candidate’s profile.

## Proficiency Levels Rubric

The proficiency level rubric consists of the criteria used to evaluate the development of future CPAs as they work to achieve the required Level 2 proficiency for each of the five enabling competency areas. You should refer to this rubric during the *Make Progress* stage of your mentoring relationship lifecycle.


To access the proficiency levels rubric, click the “?” icon found in the upper right corner of the *Reflective Questions* screen.

The CPA Way	Level 0	Level 1	Level 2
<b>Adopt the CPA Mindset</b>	<ul style="list-style-type: none"> <li>Exhibit a desire to learn from past experiences</li> </ul>	In addition to Level 0: <ul style="list-style-type: none"> <li>Exhibit skepticism about own professional/ethical behaviour</li> </ul>	In addition to Level 1: <ul style="list-style-type: none"> <li>Demonstrate insight into link between at least one CPA value (e.g., objectivity, due care, integrity) and own professional/ethical behaviour</li> </ul>
<b>Assess the Situation</b>	<ul style="list-style-type: none"> <li>Describe facts about the situation and step(s)/action(s) taken</li> <li>Identify at least one factor that is relevant to the situation:                             <ul style="list-style-type: none"> <li>Stakeholder that is affected by decision(s)/action(s)</li> <li>Professional value</li> <li>Something viewed as creative/innovative</li> </ul> </li> </ul>	In addition to Level 0: <ul style="list-style-type: none"> <li>At least partially explain what was at stake</li> <li>Identify a wider range of factors that are relevant to the situation:                             <ul style="list-style-type: none"> <li>Multiple relevant stakeholders, including the organization</li> <li>Objectives/goals/priorities</li> <li>More than one relevant professional value</li> </ul> </li> </ul>	In addition to Level 1: <ul style="list-style-type: none"> <li>Identify more than one potentially viable alternative</li> </ul>
<b>Analyze Major Issue(s)</b>		<ul style="list-style-type: none"> <li>Provides partial/superficial analysis (e.g., focus only on arguments in favor of action(s) taken), including at least one:                             <ul style="list-style-type: none"> <li>Impact of action(s) taken on stakeholders and their goals/objectives/priorities</li> <li>How/why the situation involved a conflict in professional values</li> </ul> </li> </ul>	In addition to Level 1: <ul style="list-style-type: none"> <li>Thoroughly explain/analyze alternatives and issues, including consideration of multiple viewpoints (e.g., address both pros and cons of alternatives/actions/conclusions)</li> </ul>

## Summary Questions

While Future CPAs can answer both summary questions, only question A is mandatory irrespective of how many enabling competencies they achieved during the period.

Français English Signed in as Pert Smith Close

 **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

### PRACTICAL EXPERIENCE REPORTING TOOL

#### 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?

**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?

Question A: Is important to allow your future CPA(s) to set specific development targets between your meetings. You should review the responses to these questions prior to your meeting(s) during the *Make progress* stage of your mentoring relationship lifecycle.





# 5 Notes & Attachments

## Notes

The *Notes* tab contains all the status changes of the experience reports, as well as any notes you (or a previous CPA Mentor) and/or CPA reviewers have entered.

The screenshot displays the CPA Practical Experience Reporting Tool (PERT) interface. At the top, there are language options for 'Français' and 'English', and a user status indicator 'Signed in as George ABMentor01' with a 'Close' link. The main header features the CPA logo (Chartered Professional Accountants) and the title 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below the header is a navigation menu with tabs for 'Report Details', 'Technical Competencies', 'Enabling Competencies', 'Notes' (which is highlighted), and 'Attachments'. The 'Notes' section contains two entries:

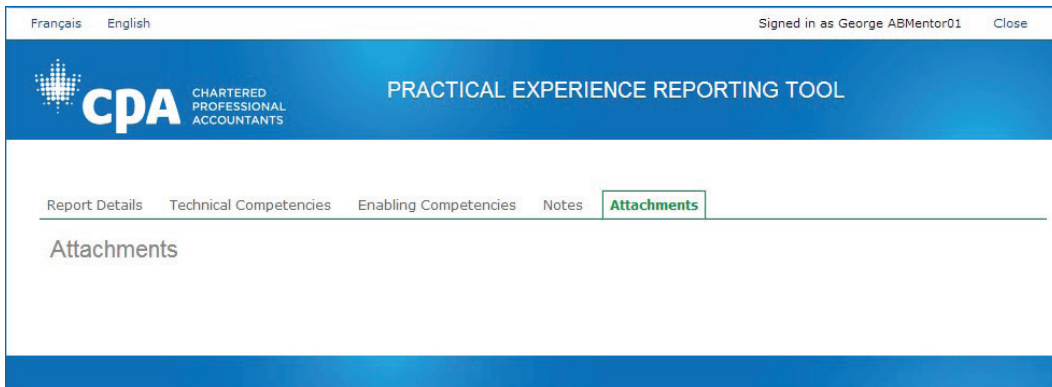
- Note created on 29/05/2014 5:39:27 PM by George Supervisor**  
Status set to Verified
- Note created on 29/05/2014 5:36:48 PM by George PEP2**  
Status set to Verification Requested

All notes are visible to future CPAs and other PERT users with access to this future CPA's profile.

## 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. From the homepage, click the name of the student/candidate.
2. Click the *Employer Name* or *Position*. New tabs are displayed.
3. Click the **Attachments** tab.



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

# 6 Consolidated Summary

The *Consolidated Summary* section allows you to view the overall progress of your student/candidate. This feature is particularly useful when a future CPA has multiple employment/experience reports.

Select the experience report(s) 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.)

The screenshot shows the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and user information (Signed in as Cheryl Williams, Change Password, Sign Out). The CPA logo and 'PRACTICAL EXPERIENCE REPORTING TOOL' are prominently displayed. On the left, a navigation menu includes Profile, Candidates, User Guide - Editing a Profile, User Guide - Mentor Meetings, User Guide - Mentor 101 Fact Sheet, and Centre for Mentoring Resources. The main content area is for 'Pert Smith' and features tabs for Experience Reports, Consolidated Summary (which is active), Mentor Reviews, and Profession Assessments. Below the tabs, it shows 'Per Status In Progress', 'Status Date 20/11/2015', and 'PEP Start Date 01/04/2014'. A section titled 'Experience Reports' includes a note: 'For self-assessment purposes only' and 'Final approval of practical experience is based on the assessment of Reviewed experience reports only'. A table lists one experience report with the following details:

Include?	Status	Date	Employer	Position	Report Period	Hrs/Wk	Report Type	Leave Taken	Duration Recognized (in months)	Report Experience Path
<input checked="" type="checkbox"/>	Verified	22/02/2016	abc	a	03/12/2014 to 31/12/2014	40.00	Current Experience	0		Experience Verification

Below the table is an 'Assess' button.

Français English
Signed in as Pert Smith Close

CHARTERED PROFESSIONAL ACCOUNTANTS
PRACTICAL EXPERIENCE REPORTING TOOL

### Duration Requirement

<b>Reported Leave</b>	22 weeks	<i>20 allowable leave weeks</i>
<b>Duration Required</b>	30.5 months	<i>30 months (adjusted for leave in excess of allowance)</i>

### Recognized Practical Experience

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

### Competency Assessment

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

## Duration Requirement

The *Duration Requirement* section provides an overview of the number of 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 week includes time away from work for such reasons as vacation, sickness, professional development, and/or study time. In this scenario, as the future CPA has taken 22 weeks of leave, they will be required to complete 30.5 months.

## Recognized Practical Experience

The *Recognized Practical Experience* section provides an overview of the recognized practical experience completed by the future CPA. Prior Experience and Current Experience are separated. *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. This 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 the technical and enabling competency requirements except the depth requirement.

## Enabling Competencies

To view a summary of your future CPA's responses, proficiency attained, duration and status, follow these steps.

1. Under *Competency Assessment*, click **Enabling**. The list of enabling competencies appears.
2. Click one the five enabling competencies. The summary view appears and provides a summary of the future CPA's responses, proficiency attained, duration and status.

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

Français English
Signed in as Pert Smith Close

CHARTERED PROFESSIONAL ACCOUNTANTS
PRACTICAL EXPERIENCE REPORTING TOOL

**TECHNICAL**

**Financial Reporting**

Financial reporting needs and systems Level 2

Position	Position Duties	Circumstance	Complexity	Autonomy	Target Proficiency	Proficiency Attained	Duration	Status
<a href="#">Audit Associate</a>	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
<a href="#">Audit Associate</a>	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* field contains active links, these only open to empty pages within PERT.

# 7 CPA Mentor Reviews


Future CPAs request mentor reviews to meet with you to discuss the competency development they have recorded in their experience report. As a CPA Mentor, you should focus on the enabling competency development of the future CPA. It is a requirement that you and your future CPA meet at least semi-annually.

## Viewing Mentor Review Requests

When a future CPA requests a mentor review via PERT, you will receive an email notification.

1. Within the email, click the link provided. You will be prompted to log into PERT.
2. Log into PERT, and click the student/candidate's name who requested the mentor review meeting (*Review Requested* is displayed in the *Status* column). review requested. A list of completed or active experience reports appears.

Français English
Signed in as Cheryl Williams [Change Password](#) [Sign Out](#)


CHARTERED PROFESSIONAL ACCOUNTANTS
PRACTICAL EXPERIENCE REPORTING TOOL

Profile

Candidates

[User Guide - Editing a Profile](#)

[User Guide - Mentor Meetings](#)

[User Guide - Mentor 101 Fact Sheet](#)

[Centre for Mentoring Resources](#)

### Candidates/Students Under Mentorship

Name	Email	Status	PER Status	Governing Body	End Relationship
Pert Smith	pertest40@mailinator.com	In Progress	In Progress	Ontario	<input type="checkbox"/>
Pert Smith	pertest34@mailinator.com	Review Requested	In Progress	Ontario	<input type="checkbox"/>

[End Selected Relationships](#)

## Completing a Mentor Review

CPA Mentors are required to document that they have completed a mentor review after they have met with their CPA student/candidate in PERT.

To complete a mentor review after you met with your student/candidate, follow these steps.

1. Click on the *Mentor Reviews* tab, click the appropriate date link in the *Status Date* column. The *Edit Mentor Review* screen appears.

The screenshot displays the 'Edit Mentor Review' interface. At the top, there are language options 'Français' and 'English', and a user status 'Signed in as Cheryl Williams' with a 'Close' link. The main header includes the CPA logo and the text 'PRACTICAL EXPERIENCE REPORTING TOOL'. Below this, the name 'Pert Smith' is shown. The 'Edit Mentor Review' section has a 'General' tab selected. The 'Mentor' field is filled with 'Cheryl Williams'. The 'Review Status' dropdown menu is open, showing 'Requested', 'Cancelled', and 'Completed'. The 'Comments' field is a large text area. The 'Next Review' date is '02/06/2016'. At the bottom, there are 'Save' and 'Cancel' buttons.

2. Click **Edit**
3. For *Review Status*, select **Completed**.
4. For *Comments*, document your notes from your meeting, including any development concerns you may have and/or actions your future CPA should work on until your next meeting.

**Note:** Comments are mandatory in order to complete the review process and are visible to the future CPA and their employers.

5. For *Next Mentor Review*, select the next meeting date that has been set between you and your student/candidate. The date is required in order to save and close the review.
6. Once you have entered the required information, click **Save**. You have completed the mentor review process.



# 8 Profession Assessments

The *Profession Assessments* tab displays any professional assessments requested by the CPA student/candidate. As a CPA Mentor, you are not required to document anything within this tab.

By clicking on the *Status Date* link, you can find out further information about the profession assessment and the CPA reviewer comments.

The screenshot shows the CPA Practical Experience Reporting Tool interface. At the top, there are language options (Français, English) and user information (Signed in as George ABMentor01, Sign Out, Change Password). The main header includes the CPA logo and the title 'PRACTICAL EXPERIENCE REPORTING TOOL'. On the left, a navigation menu lists 'Profile', 'Candidates', and 'Mentor Guide'. The main content area is titled 'George PEP2' and features a tabbed interface with 'Profession Assessments' selected. Below the tabs, a table displays the following data:

Assessment Type	Assessment Status	Status Date	Reviewer	Comments
Assessment	Required	22/05/2014	George ABReviewer01	
Assessment	Completed	09/04/2014		
Pre-Assessment	Completed	07/04/2014		

Example of the details of the information of the assessment.

Français English Signed in as Cheryl Williams Close

 **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

## PRACTICAL EXPERIENCE REPORTING TOOL

### Profession Assessment

#### General

<b>Type</b>	Pre-Assessment
<b>Assessment Reason</b>	Required Pre-Assessment
<b>Assessment Reason Details</b>	
<b>Status</b>	Completed
<b>Status Date</b>	28/10/2014
<b>Reviewer</b>	Harley Reed
<b>Comments</b>	This role has been assessed as just barely meeting a L1 competency. Unsure of j/e allocation - seems routine and non complex





**CPA**

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