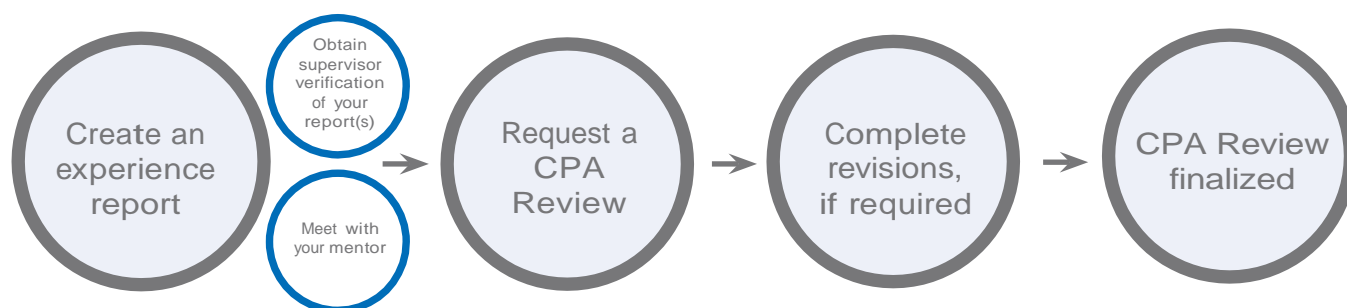


Reporting Experience Verification Route Experience: A Guide

The Process



Create a current experience report. The start date cannot be earlier than your PER Start Date.

You are required to update and submit your current experience report **twice per year**. When you select "Send to Supervisor," your supervisor will verify that you performed the duties as described.

At the mentor meeting, discuss your experience report(s) and incorporate your mentor's feedback. Your mentor will document comments about the meeting in the PERT. Mentor meetings must be "completed" in the PERT **twice per year**.

Report work experience gained prior to your PER effective date in a prior experience report using the same process. Although duration for prior experience will be capped at 12 months, use the **actual start and end date** so that the reviewer has an accurate picture of the time in that position. A specific mentor meeting to discuss your prior experience is recommended.

Request a CPA Review. There are 3 situations in which a CPA Review is required. 1) When you have reported your first 12 months of relevant experience, 2) within 90 days of a change of job and 3) when you have self-assessed that you have met the PER.

Experience reports must be in "verified" status to be assessed. Required mentor meetings must be in "completed" status.

Reports in "reviewed" status have already been assessed and are finalized reports. No further changes can be made to these reports.

It will typically take between 4 and 8 weeks for CPA Saskatchewan to process your CPA Review request.

CPA Saskatchewan may request that you submit a CPA Review at another specified date to provide you with feedback on your progress. CPA Reviews that are not required or have not been requested by CPA Saskatchewan will not be processed.

Complete revisions, if required. To complete a CPA Review, CPA Saskatchewan may require you to revise the self-assessed levels, your duties as described, clarify your responsibilities, revise your enabling competency responses, or make other corrections. You will be notified of the required revisions by email. The experience report(s) requiring updates will be set to "follow-up" status.

Once you have made the required updates, reviewed the report with your mentor and your mentor has "completed" the requested mentor meeting, you will resubmit your CPA Review request and re-enter the queue. All experience reports must be in "verified" status.

It is important that you address all concerns so that further revisions are not required.

Re-submit your CPA Review within 30 days or notify CPA Saskatchewan if you need an extension.

Finalize the CPA Review. When the reviewer is satisfied with your experience report(s) and has set the profession assessed proficiency level, your CPA Review will be completed. You will address any remaining comments from the reviewer in your future reports. The experience report(s) will be set to "reviewed" status.

You will now need to create a new current experience report to capture your experience moving forward. If appropriate, you can copy the earlier report as the basis for the new report. You do not need to re-report competencies at the same level in future experience reports, but you must demonstrate at least one technical sub-competency in each experience report.

You will be provided with the date that your next CPA Review is due given that there is no change in your employment status in the meantime. The due date can be found at any time in the PERT. **If you change your job position or your employer, your CPA Review is due within 90 days of your last day in that position.**

Checklist for Completing an Experience Report

- ☐ Is your style of communication professional and does it clearly demonstrate what you have accomplished?
 - Although one or two sentences are not sufficient to fully address the requirements, your responses need to be as clear and concise as possible. Remember that this is a formal report of your experience that will be submitted to the profession for assessment. You may be asked for revisions if your spelling and grammar are not at a professional level. You may find it useful to write and edit your responses in Word and then cut and paste the responses into the PERT.
 - The reviewer needs to understand from your description what duties you performed. Avoid using phrases such as “My team performed...”; “My company”; “I assisted with...”; or “I am able to...”. Clearly state what tasks you completed on your own, even if your work was reviewed.
- ☐ Have you reviewed your report with your mentor and incorporated your mentor's feedback?
 - Review your self-assessment of competency development, whether your description of duties sufficiently supports the technical sub-competency being reported and your enabling competency responses with your mentor during your semi-annual meetings. Areas of concern with your report should be discussed with your mentor or supervisor as appropriate.
- ☐ Are your examples unique to your position and did they occur during the time covered by the experience report?
 - It is not sufficient to copy and paste the requirements or examples provided in the PERT or the Competency Statements and Illustrative Examples in your position duties. Responses and examples should not be generic and need to accurately reflect the duties that you performed in your position. Submitting the provided examples or another's examples as your own is plagiarism and a violation of the Plagiarism Policy.

Technical Competencies

[Click here](#) to view a video on how to complete your technical competency responses (also available in the PERT Resources). Click the “?” next to the competency area for guiding questions on what should be reported in the area.

- ☐ Are the competencies you are claiming reasonable given your job description?
 - It is unlikely that a Financial Analyst would be developing Audit & Assurance competencies. If you worked on a special project to gain competencies outside of your normal responsibilities, note this clearly in the description of duties.
- ☐ Are you claiming the right number of competencies and at the right level?
 - Candidates only need to achieve eight competencies that meet core, depth, and breadth. Only four of the competencies must be Level 2. Candidates with 12 months of experience will typically develop three to four competencies at a Level 1. Only candidates with significant prior experience or an extremely robust position would typically report more or Level 2 competencies with 12 months of experience. Competencies that will not be developed in your current role are left blank. Your CPA mentor and possibly your supervisor should be able to assist you in determining what your eight technical sub-competencies could be. CPA SK recommends trying to identify the competency area for depth first.
 - For more information on the core, depth, breadth, and progression requirements of the program, see the [CPA Competency Requirements](#).
- ☐ 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. Click the “?” next to the technical sub-competency name for the guiding questions. The CPA PER Appendix A (available in the PERT Resources) lists the Level 1 and 2 requirements and examples for each technical sub-competency.
- ☐ Have you addressed all parts of the competency with appropriate examples?
 - If there are alternatives, it must be clear to the reviewer which alternative you are targeting. For competencies with multiple parts, you must demonstrate all parts of the competency as outlined, even at a Level 1.

Enabling Competencies

[Click here](#) to view a video on how to complete your enabling competency responses (also available in the PERT Resources).

- ☐ The enabling competency questions are structured as “What”, “Now What” and “So What” to guide you through performing an analysis of your situation in the CPA Way. 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.
- ☐ You must structure your responses to meet the requirements found in the CPA Way assessment rubric for the level that you have self-assessed. To view the rubric, click the “?” next to the title on the enabling competency page in the PERT. For Level 2, all requirements in the rubric must be addressed. Guidance for a specific question is found by clicking the “?” next to self-assessed proficiency on the page where you enter the response to the question.
- ☐ Enabling Competency Question 1 is not about a conflict with someone else. The situation needs to be one where you are dealing with your own internal conflict to act in a manner consistent with ethical and/or CPA professional values or you must choose between values in determining your course of action.
- ☐ The list of CPA professional values is in Section 200 of the CPA Saskatchewan [Rules of Professional Conduct](#). Note that efficiency is not a CPA professional value although it might be an attribute that is appreciated by your employer.

Employed at a CPA Firm?

A [signed CPA SK chargeable hours form](#) must be attached to your experience report before requesting a CPA Review.