

## MENTORSHIP PROGRAM STEPS - PPR

## REGISTRATION

- Apply to volunteer as a mentor. Access the <u>PERT application</u>.
- Indicate that you are part of a Pre-Approved Program (PPR) and provide the required details.
- ☐ If you wish to mentor additional students outside of your PPR, select "I want to mentor any suitable match" in the application form to join the Mentor Match Portal.

#### FIND

- As part of a Pre-Approved Program, a student will be assigned to you by your organization.
- ☐ If you have joined the Mentor Match Portal, you may receive a request from a student outside your PPR, interested in being your mentee.

## MATCH

- ☐ Provide the student with the email address you registered with so they can add you to their profile in the Practical Experience Reporting Tool (PERT). PERT will be the tool you will use to communicate your mentee's progress to CPA Ontario.
- ☐ You will receive an official mentor match email confirmation from PERT. The student has now become your mentee.
- ☐ Exchange contact information with your mentee so you can reach each other outside of the reporting tool.

### GET ACQUAINTED

- Set up an introductory meeting with your mentee within the first few weeks of matching. Getting to know each other will lay the foundation for an effective and mutually beneficial solutionship.
- Establish a mentorship agreement with your mentee, outlining how your relationship will work, how frequently you will be in touch, and what you both hope to achieve through the relationship.
- Assist your mentee in establishing a learning plan (available in the resource section of PERT) of how they will achieve their Enabling Competencies development, incorporating any relevant prior experience gained to date.

### 1ST MANDATORY MEETING

The first meeting should take place and be documented in PERT at around the 6-month mark from your mentee's PER Start Date. The PER Start Date is the date from which current practical experience begins to accumulate.

- ☐ You will receive an email from PERT notifying you that your mentee is ready for their mentor meeting and requested to meet.
- Set up a date and time in your personal calendar to meet with your mentee.
- Log in to PERT to review your mentee's experience report. Run a consolidated summary to see an overview of your mentee's progression. Review the information your mentee reported in the Technical and Enabling Competencies sections. Technical Competencies only need to be reviewed for reasonableness. Refer to PERT Guide for CPA Mentors for more details.
- ☐ Discuss your mentee's progress, concentrating on their Enabling Competencies.
- Adjust the learning plan for future development.
- ☐ Document your meeting date and comments in PERT.

### 2ND MANDATORY MEETING

(After approximately 12 months of current practical experience)

☐ Repeat steps under "1st Mandatory Meeting."

## 3RD TO 5TH MANDATORY MEETINGS

(Approximately every six months of current work experience after second meeting)

- Continue repeating meeting steps outlined in "1st mandatory meeting."
- ☐ Run a consolidated summary in PERT to see whether your mentee has met their reporting requirements and discuss next steps.
- ☐ If reporting requirements have not been met, adjust the learning plan and continue to meet until your mentee has met the Practical Experience Requirements.
- ☐ A fourth and/or fifth mentor meeting may not be required depending on how much prior experience the student has reported. For example, if they have reported 12 months of prior experience, they will only report 18 months of current experience which will require just three mentor reviews.

## COMPLETION REPORTING TO CPA ONTARIO

☐ If all reporting requirements are met, advise your mentee to request a completion review through PERT. CPA Ontario will review all their verified experience reports and, with the help of your comments, determine if your mentee has met the requirements. If they have, proceed to next step. If not, meet with your mentee to adjust the learning plan to meet the outstanding requirements.

## END FORMAL MENTORING PROCESS

- Ask your mentee to share their final assessment results from
- If all practical experience requirements are met, congratulations! Your guidance and support were instrumental in helping your mentee achieve their goal of becoming a CPA.

## START

MENTOR

STUDEN

## REGISTRATION

- ☐ If you haven't already, register as a CPA Ontario student.
- Once registered, <u>set up</u>
  <u>your profile</u> in the Practical
  Experience Reporting Tool
  (PERT).

## FIND

- Secure a job placement in a Preapproved CPA Student Training Program (PPR) that is offered by your employer organization.
- Update your employment in your PERT profile.

## MATCH

- Your mentor is assigned to you by your PPR. If you do not know who your mentor is, reach out to your Program Manager.
- ☐ Add your mentor's email address to your PERT profile. Ensure it is the same email they used in their application
- ☐ Create a new experience report in PERT outlining the start date of your employment in the Pre-Approved Program.
- ☐ Your Program Manager will need to confirm your enrollment in the PPR through PERT. Please note your Program Manager will not be able to complete this step if you have not added your mentor and created a new experience report.
- ☐ You will receive a notification from PERT confirming you have been added to the program roster. Your status will change to "In Progress" and your PER Start Date\* will be set.
- ☐ Report any relevant experience that falls before the PER Start Date in a prior experience report. Students can report up to 12 months of prior experience.
- ☐ Exchange contact information with your mentor so you can reach each other outside of the reporting tool.
- \* The PER Start Date indicates the beginning of your Current Practical Experience duration. It is set by PERT when you add an approved mentor to your PERT profile and you are confirmed on a Pre-Approved Program Roster

## GET ACQUAINTED

- Set up an introductory meeting within the first few weeks of matching. Getting to know each other will lay the foundation for an effective and mutually beneficial relationship.
- Establish a mentorship agreement with your mentor, outlining how your relationship will work, how frequently you will be in touch, and what you both hope to achieve through this relationship.
- Ask for your mentor's assistance in establishing a a learning plan (available in the resource section of PERT) of how you will achieve your enabling competency development. Review your relevant prior experience with your mentor to incorporate it into the plan.

## MANDATORY MEETING

The first meeting should take place and be documented in PERT approximately six months after the PER Start Date.

- Complete a self-assessment experience report reflecting on the development of your Technical and Enabling Competencies in the course of your work experience over the last six months.
- Once completed, request a mentor meeting through PERT. Reach out to your mentor through the contact channel you established at the onset of your relationship (by email, phone, etc.) to set up a mentor review meeting.
- Meet with your mentor to discuss your progress, concentrating on Enabling Competencies.
- Adjust the learning plan for future development.
- Update your experience report for any changes from meeting if required, and then click o "verify" to change the report status to verified.

## 2ND MANDATORY MEETING

(Approximately 12 months of current practical experience)

Repeat steps under
"1st Mandatory Meeting."

Important: you must have two mentor meetings for every 12 months of current practical experience and the meetings mus be at least four months apart to ensure you do not incur a duration penalty.

## 3RD TO 5TH MANDATORY MEETINGS

(Approximately every six months of current work experience after second meeting)

- Continue repeating meeting steps outlined in "1st mandatory meeting."
- ☐ Run a consolidated summary in PERT to see whether you have met your reporting requirements and discuss next steps with your mentor.
- ☐ If you have not met the reporting requirements, adjust the learning plan and continue to meet with your mentor until you have met the Practical Experience requirements.
- ☐ A fourth and/or fifth mentor meeting may not be required depending on how much prior experience you have. For example, if you have reported 12 months of prior experience, you will only report 18 months of current experience which will require just three mentor reviews.

## COMPLETION REPORTING TO CPA ONTARIO

If all reporting requirements are met, request a completion review to CPA Ontario through PERT. CPA Ontario will review all your verified experience reports and determine if you have met the requirements. If you have, proceed to next step. If not, meet with your mentor to adjust the learning plan to meet the outstanding requirements.

# END FORMAL MENTORING PROCESS

END

☐ Congratulations! You have met all the Practical Experience Requirements and may now be eligible to apply for membership.