Program Enrollment Guide

Updated: July 5, 2019

This guide outlines the steps from creating a My CPA Profile with the CPA Western School of Business (CPAWSB) including enrolling in the CPA Professional Education Program (CPA PEP) or CPA preparatory courses, and registering for your first courses or modules

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STEP 1: Create your profile on My CPA Portal at my.cpawsb.ca

After the login screen at my.cpawsb.ca loads, click on "Create a My CPA Profile" to load the registration page.

Once the profile registration page opens, start by completing the personal and employment information sections.

Legal Name Usage: When providing your first, middle, and last names in the Personal Information section, use your **legal name**. It is important that your documents and the name on your profile match. If your legal name has changed and differs from documents you submit, you will need to submit a legal name change document as outlined in Step 3 of this section. If you have a **preferred name** that you like to use for correspondence, you will have the opportunity to enter that name in the "Preferred Name" field which you will be shown during the process of creating your My CPA profile.

We primarily use email when we need to contact you about your transcript assessment, admission application, or your CPA studies. We will use the email address that you provide in your My CPA profile. You can provide a personal and a business email address in your profile and specify which one you prefer CPAWSB staff use to communicate with you. If you select the business email address, you will need to update it if you change employers.

Next, select your Residency Status and answer any related questions that come up.

TEMPORARY RESIDENTS: If you are a temporary resident and do not have Canadian citizenship or permanent resident status and currently live in Western Canada (British Columbia, Alberta, Saskatchewan, Manitoba, Yukon, Northwest Territories, or Nunavut), you may require Canadian study permits while enrolled in CPA preparatory courses and appropriate study and/or work permits while enrolled in CPA PEP. Please contact an Immigration, Refugees and Citizenship Canada (IRCC) officer directly, as they are authorized to advise on required Canadian study and work permits.

If required, CPAWSB can provide you with an "Appendix to the study permit" or status letter in support of your study permit application for immigration purposes. The timing of when and how you should make your request is dependent upon whether you will be enrolling directly into CPA PEP or CPA preparatory course as outline below.

Enrolling in CPA preparatory courses:

Request the "Appendix to the study permit" by emailing your request to prepadvising@cpawsb.ca, **after** your transcript assessment is completed indicating you are eligible to start in CPA preparatory courses, but **before** completing an admission application.

Important: You will need to email a copy of your study permit to prepadvising@cpawsb.ca **before** submitting an admission application for CPA preparatory courses. Admission applications will **not** be approved unless there is a copy of your study permit on file.

If you are taking prerequisite courses through a post-secondary institution, you need to request the information you require directly from the post-secondary institution.

Enrolling directly into CPA PEP:

You will only be able to request a status letter after your admission application for CPA PEP has been **approved**. Once your CPA PEP admission application is approved, you can request the Status Letter from your student portal:

Indicate that it is for a study permit form, complete the online form, and submit your request.

Once you have entered the residency information on this page, select the provincial body you intend to apply for program admission to.

> **REGIONS SERVICED BY CPAWSB:** CPAWSB only accepts applications from people who will be governed by CPA bodies in Western Canada (BC, AB, SK, MB, Yukon, Northwest Territories, and Nunavut). Please contact (CPA Ontario/Atlantic/Quebec) directly if you wish to register for CPA PEP or CPA preparatory courses outside the western region of Canada.

Once you have completed entering all relevant information on this page, click on the **NEXT ▶** button at the bottom of the page to get to the education history page.

Answer the questions about your post-secondary education. **It is important that you enter all your post-secondary education and designation information.** (If and When you request a transcript assessment, you will be able to select the documents you think you need to submit for the assessment)

> **ORIGINAL TRANSCRIPTS REQUIRED:** If you received credit from one post-secondary institution for courses from another post-secondary institution, submit the official transcripts from the post-secondary institution where you took the courses and include that institution in your education history. Evaluators need to see the original marks, credit hours, etc. to determine if those courses are eligible for any transfer credit.

> **INTERNATIONALLY DESIGNATED ACCOUNTANTS:** Internationally-designated accountants from bodies without formal MRA, RMA, or MOU agreements may be eligible for advanced standing in CPA PEP. If you hold an international professional accounting designation, you are a member in good standing with the issuing body, and that body is a member of the International Federation of Accountants (IFAC), enter the information in your education history.

Once you have completed entering **All** of your post-secondary and designation information, complete the profile creation process by confirming your information.

You should receive two separate emails within an hour of setting up your profile (you may have to check your junk email folder). If you do not receive the emails, contact the Admission Advising team at admissionadvising@cpawsb.ca and they can resend them to you.

- One email will come from CPAWSB and the provincial CPA body with which you are registering. It will outline your next steps and provide information about who you may call or email for assistance.

- The second email will come from CPAWSB and contains a link to set up a password for your My CPA profile. **Your profile will not be active until you create the password.** Once you have created your password, you will be prompted to log into your profile to complete your education history.

Keeping your contact, employer, and education history information accurate and complete will help CPAWSB provide you with accurate information and faster feedback and assistance. If your information changes, you can log into your profile at any time and update it by selecting the highlighted links in the menu as shown:

PLEASE NOTE: At this point, you have only created a profile in My CPA Portal, which you will now use to request a transcript assessment (if required), submit a program admission application, and then register for your first module(s) or course(s). You can also pay your annual fee, track your progression in the program, log into the practical experience portal, and more.

STEP 2: Request and pay for a transcript assessment

CPA ACCREDITED PROGRAMS: If you are currently enrolled in, or are a graduate of a program accredited by CPA Canada, do not submit a transcript assessment request. Please submit a CPA PEP admission application with the registration category of "Accredited Program". Also, have your post-secondary institution forward official transcripts directly to CPAWSB at 201, 1074 – 103A Street SW, Edmonton, Alberta T6W 2P6 when you complete your program.

ICAP/ICAI MEMBERS: If you are a member in good standing from **the Institute of Chartered Accountants of Pakistan** or **the Institute of Chartered Accountants of India**, do not submit a transcript assessment request. Please submit a CPA PEP admission application with the registration category of "International Designate - MOU". More information can be found in the International Applications section of www.cpawsb.ca.

CO-OP PROGRAMS/SUMMER STUDENTS: If you are currently registered in a CPAWSB-approved co-op program or are a summer student and wish to start accruing practical experience, do not submit a transcript request yet. Please submit a CPA PEP admission application with the registration category of "Co-op Student / Summer Student". You will need to submit a transcript assessment request when you are ready to register in Core 1.

For all other applicants, after creating a profile, your next step is to request and pay for a CPA transcript assessment.

Log into your My CPA profile and start by clicking on **PROGRAM ADMISSION** and then **TRANSCRIPT ASSESSMENT**.

> **IMPORTANT:** If CPAWSB receives documents before your assessment has been requested and paid for, CPAWSB cannot match them to your profile. They will also be unable to notify you (by email) when those documents have been received. As a result, this may cause your transcript assessment to be delayed significantly.
>
> It's important to create your profile and then <u>request and pay for your transcript assessment</u> <u>**before**</u> <u>having any documents sent in to CPAWSB for your assessment</u>. This will ensure that CPAWSB staff can:
>
> - Match received transcripts to your My CPA profile and your transcript request. This reduces the risk of documents being lost or misplaced.
>
> - Attach scanned copies of your submitted documents to your My CPA profile when they are received.
>
> - Send you an email confirming each document has been received and added to your profile.
>
> - Clearly identify when <u>all</u> your documents have been added to your profile and are ready to be assessed.

When the transcript assessment page loads, click on **+ ADD A TRANSCRIPT ASSESSMENT REQUEST**:

Once you click on the **+ ADD A TRANSCRIPT ASSESSMENT REQUEST** button, you will see the Document Checklist. (An example of the document checklist you will see is provided on the following page)

Review and read through the checklist sections carefully. The information you entered into the education history will automatically appear in the appropriate checklist sections. Read the directions in the Document Checklist and identify which documents are applicable to your transcript assessment request by selecting the appropriate boxes in the "I Will Submit" column.

Then arrange to have the documents submitted directly from the issuing organizations to CPAWSB at 201, 1074 – 103A Street SW, Edmonton, Alberta T6W 2P6.

Note: All documents must be in English.

> **REQUIRED DOCUMENTS:** The '**Req'd' (Documents Required)** column will not be visible on the document checklist until CPAWSB staff verifies your document checklist. They will indicate the documents that are required before your assessment can be started. CPAWSB staff may also mark additional documents as "required" to indicate additional documents you need to submit. The "**Rec'd" (Documents Received)** column will only be visible after CPAWSB receives your first document(s) and will show the date CPAWSB received each document.

Please review the Document Checklist below. Identify which documents are applicable to your transcript assessment request with a check mark in the "I Will Submit" column. Arrange to have the documents submitted to the CPAWSB. All submitted documents must be in English. Applicants enrolled in a program accredited by CPA Canada do not need to submit a transcript assessment request, rather they should submit an admission application.

Document Checklist	I Will Submit	Req'd	Rec'd
1. **Transcripts** – Please request transcript(s) from all the post-secondary institutions (PSI) you have attended within Canada. Include all accounting and non-accounting education. The PSI's registrar's office must send documentation directly to the CPAWSB in a sealed envelope. Transcripts are not required for designates from accounting organizations that are member bodies of the International Federation of Accountants (www.ifac.org), or for preparatory courses taken through the CPAWSB.	☑		
<CDN Post-Secondary you attended – Program Name>		☑	Jun 4, 2017
2. **3ʳᵈ Party Verification** - Applicants who have completed any education outside of Canada must submit a 3ʳᵈ party verification. Contact World Education Services (www.wes.org) and request an International Credential Advantage Package (ICAP) and have it sent directly to the CPAWSB. Designates from The Institute of Chartered Accountants of India or The Institute of Chartered Accountants of Pakistan are not required to submit a 3ʳᵈ Party Verification.	☑		
<Non CDN Post-Secondary you attended – Program Name>		☑	
3. **Legal Name Change Documentation** – If your CPA profile name does not match the name on any submitted documents, email a copy in PDF format of the official document supporting the change of legal name.	☐		
4. **References** – If you do not have a post-secondary degree, or are not in your final year of a degree program, the following documents must be obtained and emailed directly from the issuer to the CPAWSB. Documents a, b and d should explain how the level 1 proficiency has been satisfied for two sub-competency areas. It is recommended that specific examples and time frames be provided.	☐		
a. Resume detailing employment history and job responsibilities	☐		
b. Experience Verification (EV) self assessment form. Complete a form for each employer listed on your resume and submit to your employer(s). Request that the employer(s) verify correctness and sign the form. *The employer(s) must send* a copy of the signed EV form(s) directly to the CPAWSB.	☐		
<Employer Name 1 – Location>			
<Employer Name 2 – Location>			
<Employer Name 3 – Location>			
c. Personal character reference letter directly from the issuer	☐		
d. A reference letter from a CPA member in good standing or a member of an international accounting body that has a reciprocity agreement with CPA Canada.	☐		
5. **Letter of Good Standing** – For applicants who have a designation from an organization that is a member body of the International Federation of Accountants (www.ifac.org), the following are required:			
a. Letter of good standing from your accounting body mailed directly to the CPAWSB.	☐		
b. Transcript from your accounting body mailed directly to the CPAWSB. (Not applicable to designates from The Institute of Chartered Accountants of India or The Institute of Chartered Accountants of Pakistan)	☐		
c. Resume detailing employment history and job responsibilities	☐		
Extra Documents			
Letter of X		☑	
Certificate from Y		☑	

Once you have completed marking the "I will submit" checkboxes in the document checklist, confirm the information you see below the document checklist. Make any necessary changes and then click on the **NEXT ▶** button (as illustrated below).

Residency Status:	Canadian Citizen ▼ *
Birthdate:	02 ▼ 20 ▼ 1988 ▼ * ⓘ
Former Surname:	ⓘ
Home Phone:	(403) 999-3388 *
Mobile Phone:	(403) 999-3388
Mature Student?	☐ ⓘ

* required fields

CANCEL   **NEXT ▶**

> **MAKING CHANGES TO YOUR DOCUMENT CHECKLIST:** To add items to or remove items from the document checklist, please contact a Transcript Assessment Document Inspector by emailing transcriptassessment@cpawsb.ca or calling 1 866 420.2350 (press 1 then 3) to confirm whether that particular document will be required for your assessment before making any changes in your educational history.

Once you click on the **NEXT ▶** button, a page will load for you to pay for the assessment, as shown below. Select your payment option for the transcript assessment on this page and click the **FINISH** button. A confirmation page will load indicating that your assessment request has been received. To complete the process, click on the **SUBMIT ORDER ▶** button at the bottom of the page.

Request ➔ **Order** ➔ Complete

Item	Qty	Unit Price	Price	Tax	Total
Transcript Assesment	1	100.00	100.00	0.00	100.00
		Total:	**$100.00**	**$0.00**	**$100.00**

Payment Option: Select Value ▼ *

CANCEL   **◀ BACK**   **SUBMIT ORDER ▶**

> **CPA TRANSCRIPT ASSESSMENT FEE:** The transcript assessment fee is $100 and is subject to change. For current fee schedules check the CPA PEP or CPA preparatory sections of the CPAWSB website. Transcript assessment fees are non-refundable.

EMPLOYER PAYMENT OPTIONS: Some **candidates in pre-approved path employment positions** will have the option to have their employer pay for the module or course. This is only available to candidates of pre-approved pathway employers who requested to have the option available. It is important to have your employer information complete. All pre-approved path employers are already listed in the drop-down menu. If you cannot find your employer, please check your employer information and try a different keyword in your search (i.e. An applicant may search for PwC. If they are not found, try something else such as "PricewaterhouseCoopers" instead) If you believe you have the correct employer chosen but they do not show in the drop-down menu it may be that they do not offer the option to pay for you.

Once you submit and pay for your transcript assessment, you will receive email notifications if a change is made to your document checklist including for the following reasons:

- Additional documents have been requested by a Document Inspector
- Documents have been received by CPAWSB
- All your Documents have been received and your assessment is ready to be assessed

The emails do not indicate specifically what has changed. They simply prompt you to check your document checklist to see what has changed.

When you receive these emails, log into your profile and check your document checklist to see what has changed. Using the Document Checklist in your profile, it is expected that you will know what documents you are required to submit and keep informed of the status of those documents from updates made to the document checklist. The sooner you can get the required documents in, the sooner your assessment can be started. Once all your documents are received, your assessment will be put in queue to be completed.

From the time **all required documents are received**, standard* turn-around times for the assessment to be completed is usually within 10 business days.
*Periods of high volumes (during active registration periods) may increase the standard turn-around times

To access the document checklist, log into your My CPA profile. From the menu, click on **PROGRAM ADMISSION** and then **TRANSCRIPT ASSESSMENT**.

If you have questions about the documents you are submitting or want to check on the status of your in-progress or completed assessment, please call the Transcript Assessment department toll free at 1 866 420.2350 (press 1 then 3).

STEP 3: Arrange to have documents submitted

You will need to arrange for all transcripts and supporting documents, marked as "required" in your document checklist, to be submitted so they can be assessed. All documents being mailed in should be sent directly by the issuing institutions or organizations to:

> CPA Western School of Business
> Student & Support Services
> 201, 1074 – 103A Street SW, Edmonton, Alberta T6W 2P6

USING THE CORRECT ADDRESS TO SUBMIT DOCUMENTS: Documents sent anywhere other than the address above, including to provincial CPA offices, will likely result in you having to arrange to resend the documents to the address above and can significantly delay the completion of your transcript assessment.

Transcripts from Canadian Post-Secondary Institutions

Please request transcripts from every Canadian post-secondary institution (PSI) you have attended, ensuring each is listed in your document checklist. Include all accounting and non-accounting education. The PSI's registrar's office must send your transcripts in a sealed envelope directly to CPAWSB (at the above address).

Transcripts from Non-Canadian PSI's and Third-Party Verification

Applicants who have completed any education outside of Canada must submit a third-party verification. Contact World Education Services Canada (www.wes.org/ca/partners/cpa-western-school-business-manitoba-saskatchewan-alberta-british-columbia/) and request an *International Credential Advantage Package (WES ICAP)* **for the CPA Western School of Business** (Please note that a **course x course assessment is required**) for "**educational**" purposes. If you purchase the WES ICAP you will only need to have your official transcripts sent to them. We will receive a copy of your official transcripts directly from WES so, therefore, you DO NOT need to submit your transcripts directly to CPAWSB.

PLEASE NOTE: If you submit third-party verification that is not a WES ICAP, you will need to also have official transcripts sent directly by the issuing institutions or organizations to CPAWSB. The third-party assessment must be completed by one of the registered assessment services within the Alliance of Credential Evaluations Services of Canada (ACESC) and sent directly from the issuer to CPAWSB.

PLEASE NOTE: CPAWSB will accept official transcripts received directly from the applicant **ONLY IF** they are contained in the sealed envelope that came directly from the post-secondary institution.

PLEASE NOTE: If and only if there is absolutely no way for you to have official transcripts sent from the PSI you attended to WES or to CPAWSB, CPAWSB will accept an official third-party verification, sent directly from the issuer to CPAWSB, for **degree recognition only** (without the official transcripts or WES ICAP no transfer credit can be recognized).

> **ICAI/ICAP MEMBERS:** Designates from the Institute of Chartered Accountants of India or The Institute of Chartered Accountants of Pakistan are NOT required to submit a third-party verification.

Legal Name Change Documentation

If your CPA profile name is different from the name appearing on any submitted documents, send a **PDF copy** of the official document supporting your legal name change to transcriptassessment@cpawsb.ca.

References

These only apply If you do NOT have a post-secondary degree and are NOT in your final year of a degree program. Arrange to have the following documents emailed directly from the issuer to CPAWSB at transcriptassessment@cpawsb.ca. Documents a, b, and d should include specific examples and time frames explaining how you have satisfied Level 1 proficiency for two sub-competency areas.

a. **Resume** detailing employment history and job responsibilities

b. **Experience Verification (EV) self-assessment form.** Complete a form for each employer listed on your resume and submit to your employer(s). Request that the employer(s) verify correctness and sign the form. **The employer(s) must send a copy of the signed EV form(s) directly to the CPAWSB.**

c. **Personal character reference letter** sent directly from the issuer.

d. **A reference letter** from a CPA member in good standing or a member of an international accounting body that has a reciprocity agreement with CPA Canada.

Letter of Good Standing

These only apply If you have a designation from an organization that is a member body of the International Federation of Accountants (www.ifac.org). The following are required:

a. **Current Letter of Good Standing** from your accounting body mailed directly to CPAWSB.

b. **Transcript from your accounting body** mailed directly to CPAWSB. (Not applicable to designates from the Institute of Chartered Accountants of India or the Institute of Chartered Accountants of Pakistan)

c. **Resume** detailing employment history and job responsibilities.

> **IFAQ MEMBER BODIES:** If you have a designation from an organization that is a member body of the International Federation of Accountants (www.ifac.org), even though your **post-secondary transcripts are not required** by CPAWSB, you are **required to submit a third-party verification of your post-secondary transcripts** as outlined in section 2 of the document checklist.

If you are an **internationally designated accountant** and have questions or concerns about specific documents being submitted or that you are being asked to submit, please email cpaapplication@cpawsb.ca or call 1 866 420.2350 (press 2 then 1). **For all other applicants**, if you have questions or concerns about specific documents being submitted or that you re being asked to submit, please email transcriptassessment@cpawsb.ca or call 1 866 420.2350 (press 1 then 3) to have your questions or concerns addressed.

> **ADDITIONAL DOCUMENTS REQUIRED:** If any additional documents have been added to your document checklist and marked as "Required", they should also be submitted directly to CPAWSB.

As indicated earlier, if you have requested and paid for the transcript assessment before CPAWSB receives any of your documents, CPAWSB will send you an email when a document is received, and the document checklist has been updated. The document checklist in your My CPA profile will indicate which documents have been received and list any that are still outstanding. CPAWSB will email you if additional documentation is required and when your assessment is complete. The transcript assessment will start after all required documents have been received. Once your assessment has been completed, you will receive an email and the results will be available in your My CPA profile.

To view your assessment results, click on **PROGRAM ADMISSION** and then **TRANSCRIPT ASSESSMENT**.

You will see any requested transcript assessments and their status directly below the **+ ADD A TRANSCRIPT ASSESSMENT REQUEST** button.

When the transcript assessment is complete, it will show "completed" under the Status. Click on the View link in the last column to see the results of your transcript assessment. The assessment's expiry date is also displayed.

Reviewing your completed Transcript Assessment

If the transcript assessment indicates that you need to complete prerequisite education before entering CPA PEP, you can take CPA preparatory courses through CPAWSB or equivalent courses through a recognized post-secondary institution.

> **TRANSCRIPT ASSESSMENT EXPIRY & 10 YEAR RULE FOR CORE COURSES:** Transcript assessments are valid for one year from the time they are completed. Additionally, at least one applicable course in each of the following CPA competency areas (Financial Reporting, Strategy and Governance, Management Accounting, Audit and Assurance, Finance, and Taxation) must have been taken within the 10 years preceding admission to CPA PEP.

> **APPLYING FOR CPA PEP BEFORE YOUR ASSESSMENT IS COMPLETED:** If, and only if, you have completed or will soon complete all prerequisites for CPA PEP and you plan to enroll in the next offering of Core 1, **submit an admission application for CPA PEP*** (STEP 4) and, once your application is approved, **register for Core Module 1** during the next PEP registration period (STEP 5), **even if your transcript assessment is not complete**.
>
> *If you are entering CPA PEP as an **International Designate** wait until your transcript assessment is complete before submitting a program admission application.

When reviewing your transcript assessment in your My CPA profile, you may notice a listing of Modules 13 – 20 under the prerequisite section of the assessment results. Please disregard these as they apply to ACAF applied courses only. These are not required for CPA PEP and they are not relevant, even if your planned route is ACAF, as ACAF Applied courses need to be taken through an approved post-secondary institution.

Updating your completed transcript assessment for requirements you did not meet

If you have requirements that have not been met for entry into CPA PEP, you will see the outstanding requirements highlighted in red, as shown in the example below.

If your assessment is still valid (within 1 year of assessment completion date), once you have completed or satisfied any outstanding requirements, your transcript assessment can be updated with these missing requirements. Follow the procedures below to have your transcript assessment updated:

> ➢ If you are completing the requirements from a source external of CPAWSB, have the appropriate official documents submitted to CPAWSB. Once we receive the required documents, we will let you know by email that we have received them, and we will update your transcript assessment.

➢ For CPA preparatory courses you successfully passed prior to May 1, 2019 and which have not been updated on your transcript assessment, log in to your My CPA portal and go to your transcript assessment. Indicate the outstanding courses you want updated and then click on the golden 'REVIEW GAPS" button. Indicate that you are requesting a "PREP" update. The assessors will receive your request and update your assessment within a few days. You should receive an email once your transcript assessment is updated with the change(s).

➢ For CPA preparatory courses you successfully pass after May 1, 2019, you do not need to do anything. Your transcript assessment will be updated once the marks are released for the session in which the course was taken. Updates may take a few weeks to process due to the volume of successful course completions. You should receive an email once your transcript assessment is updated with the change(s).

As long as your assessment hasn't expired, there is **no additional assessment fee** to have your completed transcript assessment updated with any missing requirements.

If your transcript assessment has expired and you are not enrolled as a student in CPA preparatory courses or as a candidate in CPA PEP, you will not be able to submit a gap verification request. You will need to request and pay for a new assessment and submit updated documentation to enroll.

If you have further questions about your in-progress or completed assessment please contact the Transcript Assessment Team by calling 1 866 420.2350 (Press 1 then 3) or by emailing transcriptassessment@cpawsb.ca.

STEP 4: Apply to enter CPA PEP or CPA preparatory courses by submitting a program admission application

If you are applying to CPA PEP:

If, and only if, you have completed or will soon complete the prerequisites for CPA PEP and you plan to enroll in the next offering of Core 1, **submit an admission application for CPA PEP*** and, once your application is approved, **register for Core Module 1** during the next PEP registration period (STEP 5)**, even if your transcript assessment is not complete**. This will allow you to avoid any late fees. Your assessment will be completed before the start of Core 1 to confirm whether you are eligible to participate in the module. If the assessment determines you are ineligible to participate in Core 1, you will be removed from the module and issued a full refund of the module fee. If you believe you may not meet all the prerequisite requirements for CPA PEP before the next offering of Core 1 or you plan to start in a later offering of Core 1, wait for your completed transcript assessment and then submit your program admission application.

*The above is not applicable if you are entering CPA PEP as an **International Designate**. Wait until your transcript assessment is complete before submitting a program admission application.

> **CO-OP / SUMMER INTERN STUDENTS:** If you are a **co-op/summer intern student**, you can submit a CPA PEP admission application before you complete your post-secondary program and before requesting a transcript assessment. You will be granted access to My CPA Portal and the Practical Experience Reporting Tool (PERT) after your admission application is processed. Wait until you have completed your degree and all CPA PEP prerequisites to submit a transcript assessment request, then have your post-secondary institution send updated official transcripts directly to CPAWSB.

> **TRANSITIONING TO CPA PEP IF YOU ARE A CPA preparatory course GRAD:** If you are **currently registered in CPA preparatory courses and have paid CPA preparatory student dues for the current academic year** (April 1 to March 31) and are now transitioning into CPA PEP, click here for detailed Prep to PEP transition instructions.

If you have outstanding prerequisite courses to complete before entering CPA PEP:

If you still need to complete prerequisite courses before entering CPA PEP and are planning to take some or all those courses through CPA preparatory courses, wait until you receive your transcript assessment results before submitting a CPA preparatory course admission application.

Submitting an Admission Application in My CPA Portal

Log into your online profile. Select **PROGRAM ADMISSION** and then **ADMISSION APPLICATION** and complete the admission application form.

When you apply to enroll in CPA PEP or CPA preparatory courses, you take the modules or courses from CPAWSB and are a **student** (enrolled in CPA preparatory courses) or a **candidate** (enrolled in CPA PEP) of a provincial CPA body for governance and employment tracking purposes. So, someone living and working in BC is enrolled in CPAWSB and governed by CPABC.

> **IMPORTANT:** It is important that the **Employment Sector** and **Job Title** Fields in the employment Information section of your profile (under Contact Information) <u>are not blank and that they match</u> what you enter in these two fields when you submit an Admission Application for PEP. If they are not completed and/or they do not match, the system will not let you complete the PEP Admission Application.

Complete the following sections:

Program Application

Accounting Body

Select the province or territory in which you live.

> **REGIONS SERVICED BY CPAWSB:** CPAWSB only accepts applications from people who will be governed by CPA bodies in Western Canada (BC, AB, SK, MB, Yukon, Northwest Territories, and Nunavut). Please contact (CPA Ontario/Atlantic/Quebec) directly if you wish to register for CPA PEP or CPA preparatory courses outside Western Canada.

CPA Program and Intended Program/Session

Select the CPA program you are applying to enter:

- If you are eligible to apply for CPA PEP select "PEP" and then select the first academic session that you are planning to register in. See the [CPA Professional Education Program (CPA PEP) Schedule and Key Dates (Western Region)](#) for registration periods.

Then select the first academic session that you are planning to register in. See the [CPA preparatory courses Schedule (Western Region)](#) for registration periods.

Registration Category

Selecting the most appropriate registration category helps avoid delays when your application is processed. Therefore, please choose the category that best describes your background.

Choices when applying to CPA PEP:

University Degree: select this if you have completed (or will soon complete) an undergraduate degree from a Canadian post-secondary institution

Co-op Student: select this if you are registered in a CPA-approved co-op program

Note: if you are not in an approved co-op program and want to register to start accruing practical experience, register as a Summer Student (below).

Summer Student: select this if you are completing an undergraduate degree and are registering to start accruing practical experience
Note: If you are in a CPA-approved co-op program, register as a Co-op Student (above).

International University Degree: select this if you have completed (or will soon complete) a degree from a post-secondary institution outside of Canada

CPA Accredited Program: select this if you have completed (or will soon complete) a CPA-accredited graduate program such as the Master of Accounting Program (MAcc) at University of Alberta or Master of Professional Accounting (MPAcc) program at University of Saskatchewan.

Note: Ensure the MAcc or MPAcc degree information and your anticipated completion date (if applicable) appears in the education history section in your My CPA profile.

Master's Degree: select this if you have completed (or will soon complete) a master's degree from a **Canadian** post-secondary institution

Note: Ensure the master's degree information appears in the education history section in your My CPA profile, and if applicable, your anticipated completion date.

preparatory course Graduate: select this if you are currently registered in the CPA preparatory courses and have paid CPA preparatory student dues for the current academic year April 1 to March 31) and are now transitioning into CPA PEP. Click here for detailed Prep to PEP transition instructions.

Mature Student: select this if you do not have a recognized post-secondary degree and you are applying under the Mature Student pathway. Please note that you must have a completed transcript assessment before applying. If your transcript assessment is not complete, please wait until it is complete.

International Designate: select this if you completed an accounting designation with a non-Canadian accounting body. Please note that you must have a completed transcript assessment before applying. If your transcript assessment is not completed, please wait until it is complete.

International Designate – MOU: Select this if you are a member in good standing with the Institute of Chartered Accountants of India (ICAI) or Institute of Chartered Accountants of Pakistan (ICAP)

Transfer In: select this if you are transferring in from a province outside Western Canada (BC, Alberta, Saskatchewan, Manitoba, Yukon, Northwest Territories, or Nunavut)

Re-admission: select this if you are re-applying for CPA PEP after having been withdrawn

Choices when applying to CPA preparatory courses:

New Student: select this if you have never had an admission application approved before

Re-admission: select this if you were previously enrolled in CPA preparatory courses and now intend to complete the program

Transfer In: select this if you are transferring in from a province outside Western Canada (BC, Alberta, Saskatchewan, Manitoba, Yukon, Northwest Territories, or Nunavut)

Previous Registrations

Select "Yes" if you are currently or were previously registered as a student of a legacy accounting body (CA, CMA, CGA). Otherwise, select "no".

Language Advisory

CPA education programs require high English proficiency. A minimum of Grade 12 English or **Canadian Language Benchmark (CLB)** level 8 or higher is suggested. Generally, anyone with CLB levels below 8 will need to spend additional time on their studies. Therefore, it is recommended that students or candidates with CLB levels 7 or below, improve their language competence before enrolling in CPA education programs.

Check the "I Agree" checkbox to confirm that you have read and understood that successful completion of CPA education programs generally requires Grade 12 English, or CLB levels at 8 or higher.

Language Support

Select "Yes" if you would like more information about language upgrading support. Otherwise, select "No".

Next (Transcript Assessment Summary)

Based on your assessment and the courses or modules you require, select the course or module you plan to enroll in and the session you plan to start in and then click on the [NEXT ▶] button.

> **PLEASE NOTE:** By selecting the course or module you plan to enroll in, you are only indicating which course or module you intend to take; however, your registration is not confirmed. Once your admission application is approved you still need to register for your first course or module.

Once the page loads, you will see a summary of the assessment you requested. If additional documents or answers to questions are required from you, they will also be listed. Answer any questions and click on the [NEXT ▶] button.

Profile Information

Complete each section: **Contact Information, Current Residential Address, Employment Info*, and Business Address.**

*Candidates in pre-approved path employment positions: it is important to ensure your employer information is complete so that if your employer offers the option of paying for your module or course

fees, the payment can be associated with your registration. All pre-approved path employers are already listed in the drop-down menu. If you cannot find your employer, please try a different keyword in your search (ie. If you search for "PwC" and cannot find the appropriate result, try a variation such as "PricewaterhouseCoopers" instead). If you believe you have the correct employer but no record appears in the drop-down menu, the employer may not offer the option to pay for you.

Click on the **NEXT ►** button.

Good Character and Reputation

The questions in this section are provincial legislative requirements to establish that an applicant has good character and reputation. Answering "yes" to any of the questions means that CPAWSB Student & Support Services will contact you for more information and, if required, supporting documents.

Answer all the questions and click on the **NEXT ►** button.

Declarations

Carefully read the **Application Declaration**, **Student Commitment**, **Privacy Statement**, and the **CPA Professional Education Program Entrance Requirements.** If you agree with each one, select the "I Agree" checkboxes. After you finish, click on the **NEXT ►** button.

Admission Application Payment

The last step is to pay the initial registration fee (if any) and annual student or candidate dues. Payment is accepted by credit card only.

> **PROMO CODE FIELD:** You will see the following "Promo Code" field:
>
> Promo Code: [＿＿＿＿＿] **APPLY**
>
> There are currently no promotional offers of any kind, so please leave this field empty.

After you enter your credit card information, click on the **SUBMIT ORDER ▶** button.

A confirmation page will load, confirming your payment and submission of your admission application.

After your admission application is reviewed, you will receive an email from Admission Services,

> **CPA PEP & preparatory course FEES:** Fee schedules and additional CPAWSB information about CPA PEP and CPA preparatory courses is available on the CPAWSB website.

indicating whether it is approved or denied. If your program application is approved, you can start registering in modules or courses for which you are qualified.

If you do not receive an approval email within five business days of applying, please contact prepapplication@cpawsb.ca for CPA preparatory course applications or cpaapplication@cpawsb.ca for CPA PEP applications to inquire about your application.

> **LATE PEP MODULE REGISTRATIONS:** If you plan to register in a **CPA PEP module** but you have missed the posted module registration period, there is a waitlist available. **Waitlist registration** is accepted via the module registration page of your My CPA portal and is **available from the close of the module registration period up until one week before the module starts**. You are required to submit a CPA PEP application before registering for the Core 1 waitlist. These **CPA PEP applications must be submitted one month prior to the start of core 1** and will not be accepted after this time. A non-refundable waitlist fee is also required at the time of waitlist request. For more information about the Waitlist process, please visit the CPA PEP Module Registration page on the CPAWSB website.

STEP 5: Register for a module or course

After your program application is approved, you can start registering in modules or courses for which you are qualified.

When you next log into your My CPA profile, you will see four new sections available in the menu:

- REGISTRATIONS

- PROGRAM MANAGEMENT

- PROGRAM REQUESTS

- PRACTICAL EXPERIENCE

These sections of your My CPA profile allow you to:

- Register in modules/courses and exams including the CFE;

- Monitor your progress including what courses or modules you have taken and have remaining;

- Complete annual re-enrollment and pay annual dues;

- Make program appeals;

- Access annual tax receipts;

- Request workshop and exam accommodations;

- Request a CPA transcript; and

- Access the Practical Experience portal and PERT tool to report practical experience.

To register for a course or module, select **REGISTRATIONS** from the menu and then select **MODULE REGISTRATION**.

You will now see a summary of your program enrollment(s) and your module registration history, which shows previous and current course or module registrations.

To register for a new course/module, click on the **+ ADD MODULE REGISTRATION** button. Next, use the pull-down menu to select the Academic Session in which you want to register. The courses or modules available for that session will appear. The ones you are eligible to enroll in will appear with a checkbox and will display **Eligible to Register** in the **My Status** column (see the screen shot on the next page).
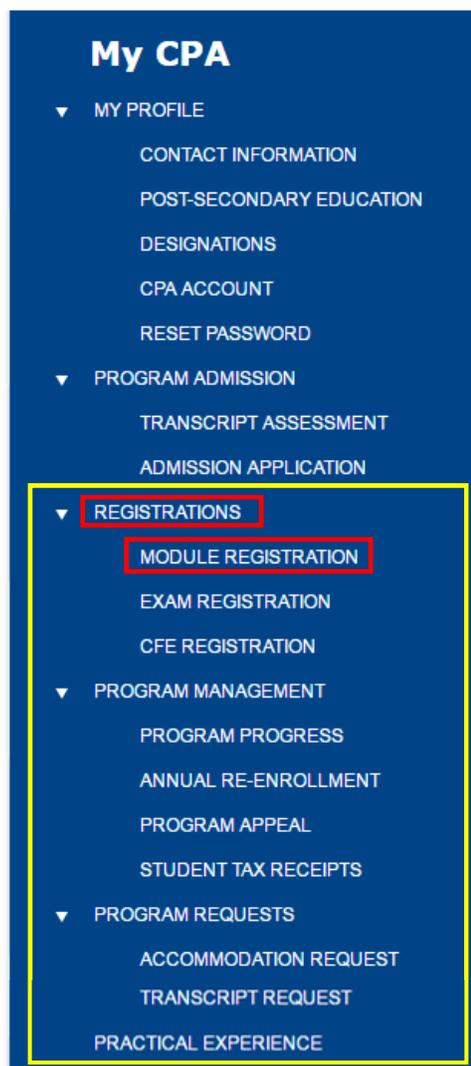
> **PREREQUISITE REQUIREMENTS FOR CPA preparatory courses:** If you are registering for CPA preparatory courses, they may have prerequisite courses that will need to be completed before taking those courses. Prerequisite information for each preparatory course can be found in both graphical and text formats on the CPAWSB website.

Select ⊕ Register ⊕ Invoice ⊕ Confirmation

Select a Module Offering:

Academic Session: PEP 2016/2017 Winter Session ▾

Register?	Level	Module	Module Name	Delivery	Schedule	My Status
	1	C1	Core 1	Standard	Online	Registered for Course in Session 3
☐	2	C2	Core 2	Standard	Online	**Eligible to Register**
	3	AS	Assurance	Standard	Online	Prerequisites Not Met
	3	PF	Performance Management	Standard	Online	Prerequisites Not Met
	3	TX	Tax	Standard	Online	Prerequisites Not Met

* If the module delivery method is Classroom or Webinar a surcharge applies

CANCEL   NEXT ▶

WEBINAR AND IN-CLASS OPTIONS FOR CPA preparatory courses: If you are registering for **CPA preparatory courses**, some courses may have the option to add a Webinar or In-Class option, for an additional fee. If you register for a webinar or in-class option, you will receive access to the same materials as Distance students and will be expected to follow the same schedule; however, the webinar option provides two 3h online evening webinars per week with a live instructor and the in-person option provides one weekly 8h Saturday class with a facilitator. Only certain courses offer the webinar and in-class options are only available in certain locations. A schedule outlining which Core CPA preparatory courses offer these options and details about the offerings can be found at www.cpawsb.ca on the CPA preparatory course schedules page. The fees for these additional offerings can be found on the CPA preparatory course fees page.

After selecting the course(s) or module(s) you want to register in, click on the NEXT ▶ button. Information about the start date and exam date will appear; select your preferred exam location. For CPA PEP modules only, you will also be asked to select your preferred workshop location. Next, read the CPA Student Training Contract and if you agree, select the checkbox confirming that you have accepted its obligations and conditions. Finally, Click on the NEXT ▶ button.

WITHDRAWING FROM A CPA PEP MODULE OR preparatory course: CPA PEP Module withdrawal and preparatory course withdrawal deadlines and penalties are outlined in the Administrative Fee Schedules available on the CPAWSB website:

- CPA PEP Administrative Fees

- CPA preparatory courses Administration Fees

Your final step for registering in the course or module is to enter your credit card information* and complete payment.

*Some candidates will have the option to pay by credit card or have their employer pay for the module or course. This is only available to candidates of pre-approved pathway employers who requested to have the option available.

> **PROMO CODE FIELD:** When paying by credit card, you will see the following "Promo Code" field:
>
> Promo Code: [_____] **APPLY**
>
> Currently, there are no promotional offers of any kind so please leave this field empty.

After you enter the appropriate payment information, click on the **SUBMIT ORDER ▶** button.

A new page will load, confirming your payment for the module or course.

Do you have more questions about registering for CPA PEP or CPA preparatory courses?

For questions about CPA PEP, please visit our website and search the CPA PEP FAQs. You will find answers to the following questions and more:
- Can I apply to CPA PEP without a degree?
- When do I get access to module materials?
- How do I print my receipt?
- How much time will I spend on assignments each week?
- And additional questions and answers about transcript assessments, admission applications, module registration, online learning, workshops, My CPA Portal, capstone modules, module exams, and the CFE.

For questions about CPA preparatory courses, please search the CPA preparatory course FAQs. You will find answers to the following questions and more:
- How to register in two CPA preparatory courses in one semester?
- How to register in a course that you have an exemption for?
- You registered in the wrong course. How do you correct that and register in the correct course?
- How much study time is recommended for the CPA preparatory courses?
- Low long does it take to get access to your course materials?
- What is the difference between Distance and Distance with in-class or webinar options?
- And additional questions and answers about admission, course delivery, and examinations.
- We also strongly suggest you utilize the online CPA preparatory courses Resource Center.

If you need further assistance and cannot find the answers within this guide or on our website, please go through the "Who to Contact" section of this guide to determine who can best help in answering your question accurately and thoroughly. Base your choice of who to contact on whether you are currently a prospective student/candidate, a student (already enrolled in preparatory courses), or a candidate (already enrolled in CPA PEP) and the subject of your question. The contact section provides information to assist you with this.

Resources and Additional Information

Schedules for CPA PEP and CPA preparatory courses

Module and course registration takes place throughout the year for the CPA Professional Education Program (CPA PEP) and CPA preparatory courses. Schedules, including registration periods, module and course start dates, and exam dates are available on the CPAWSB website:

- CPA Professional Education Program (CPA PEP) Schedule and Key Dates (Western Region)

- CPA preparatory courses Schedule (Western Region)

CPA Practical Experience Requirements (CPA PER)

CPA certification includes a period of practical experience. To begin reporting practical experience, you first need to apply and be accepted into CPA PEP. After you have been accepted as a CPA candidate you will be granted access to the Practical Experience Reporting Tool (PERT).

Practical experience requirements are administered through provincial CPA organizations within Western Canada (BC, Alberta, Saskatchewan, Manitoba, Yukon, Northwest Territories, and Nunavut). For more information, visit the CPA Canada website for the CPA practical experience requirements overview and visit the website of the provincial CPA body that you are enrolling within:

- CPA British Columbia (includes the Yukon)

- CPA Alberta

- CPA Saskatchewan

- CPA Manitoba

If you still have questions after thoroughly reviewing the PER and PERT information on the CPA Canada and provincial websites, email the practical experience team in your province or territory with your unanswered questions or concerns.

Important Technical Requirements

Exams for CPA PEP modules and CPA preparatory courses are required to be written using only **Windows-based** laptops and using only **Texas Instrument BA II Plus calculators** (no other calculators are permitted, including the Texas Instrument BA II Plus Professional). Laptop requirements are outlined in detail on the CPAWSB website: CPAWSB computer requirements

The Texas Instrument BA II Plus is available for purchase from online retailers and office supply stores. Students and candidates are encouraged to use it while taking courses and modules to become familiar with the functions.

Questions? | Who to Contact

Provincial CPA Organizations

If you have not completed a My CPA profile yet and are looking for information about becoming a CPA or finding out if the CPA designation is right for you, contact your provincial CPA organization and ask to speak with a business development or student recruitment officer. Provincial CPA bodies also have information about practical experience, mentorship, career services, volunteer opportunities and upcoming provincial CPA information sessions and events.

Provincial CPA Organizations	Business Development Contact
CPA British Columbia goCPAbc.ca (Yukon residents are administered by CPA BC)	recruitment@bccpa.ca 604.872.7222 (toll free: 1.800.663.2677)
CPA Alberta cpaalberta.ca (Northwest territories and Nunavut are administered by CPA AB)	gettingstarted@cpaalberta.ca toll free: 1.844.454.1245
CPA Saskatchewan cpask.ca	becomeacpa@cpask.ca 306.359.0272
CPA Manitoba cpamb.ca/becomeacpa	becomeacpa.mb@cpawsb.ca 204.943.1538 (toll free: 1.800.841.7148)

CPA Western School of Business (CPAWSB)

Admission advising and transcript assessment inquiries for **new CPA applicants**

You are a new applicant if you plan to enroll with CPAWSB but have not yet been accepted into the CPA Professional Education Program (CPA PEP) or CPA preparatory courses.

Questions about	Contact
Accessing and navigating your My CPA online profile Program enrollment processes including requesting a transcript assessment, and general questions regarding CPA PEP, and CPA preparatory courses	admissionadvising@cpawsb.ca Toll Free: 1 866 420.2350 (Press 1 then 2)
Your in-progress or completed transcript assessment including questions about documents being submitted, the status of your transcript assessment, your transcript assessment results, and any other questions pertaining to your assessment.	transcriptassessment@cpawsb.ca Toll Free: 1 866 420.2350 (Press 1 then 3)
Applying if you are an applicant who holds an International Designation.	cpaapplication@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 1)

Assistance and advising for **CPA preparatory course students**

You are a **student** if you have been accepted into CPA preparatory courses.

Questions about	Contact
Completing the admission application and applying for entry into CPA preparatory courses, course registrations, temporary or permanent program withdrawals, and annual student dues and re-enrollment	prepapplication@cpawsb.ca Toll Free: 1 866 420.2350 (Press 3 then 2)
Assistance with course planning, transfer credits, obtaining appendix letters for study permit requirements, and tax receipts	prepadvising@cpawsb.ca Toll Free: 1 866 420.2350 (Press 3 then 3)
CPA preparatory course exams, including questions about exam accommodations and special consideration requests	prepexams@cpawsb.ca Toll Free: 1 866 420.2350 (Press 3 then 4)
CPA preparatory courses currently in session, including questions about quizzes and projects, module withdrawals, grading, and program policy appeals, and all other preparatory course questions	prepmodule@cpawsb.ca Toll Free: 1 866 420.2350 (Press 3 then 5)

Assistance and advising for CPA PEP candidates

You are a **candidate** if you have been accepted into the CPA Professional Education Program (CPA PEP).

Questions about	Email address
Applying for entry into CPA PEP if you are an applicant who **holds an International Accounting Designation**	cpaapplication@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 1)
Applying for entry into CPA PEP (except for applicants with an International Accounting Designation; see above) Annual Re-enrollment, program withdrawals, transferring to another province or requesting a status letter Questions from employers about Candidate dues or enrollment	cpaapplication@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 3)
Enrolling in CPA PEP modules or exams, including registrations, withdrawals, and schedules Questions from employers about Candidate module registration or an associated payment	cpamodule@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 1)
PEP exam or CFE deferrals, appeals, or results	cpamodule@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 2)
CPA PEP module assignment extensions	cpaextensions@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 3)
Workshop or Capstone presentation information	cpamodule@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 4)
Accommodations for CPA PEP workshops and exams	cpaaccommodations@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 2)
Practical Experience (Practical experience is administered by the provincial CPA bodies. Information is also available on their respective websites.)	Please contact your provincial CPA body: ➢ CPA BC/Yukon　　1.800.663.2677　cpabcper@bccpa.ca ➢ CPA Alberta/NWT/NU　1.800.232.9406　practicalexperience@cpaalberta.ca ➢ CPA Saskatchewan　1.800.667.3535　practicalexperience@cpask.ca ➢ CPA Manitoba　　1.800.841.7148　practicalexperience@cpamb.ca

Assistance and advising for **employers** of candidates in CPA PEP

Employer Questions about	Contact
The employer portal, advisory panels, webinars, other resources available to employers, and accessing candidate results	outreach@cpawsb.ca Toll Free: 1 866 420.2350 (Press 4 then 1)
Candidate dues or candidate enrollment	cpaapplication@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 3)
Candidate module registration or an associated payment	cpamodule@cpawsb.ca Toll Free: 1 866 420.2350 (Press 2 then 4 then 1)

Additional Important Contact Information

Questions about	Contact
The CPA PDPA program, **available only to CPA designated members in good standing**, who are interested in qualifying for public accounting registration post-designation.	pdpa@cpawsb.ca Toll Free: 1 866 420.2350 (Press 5, then listen to the pre-recorded message, and then press 1)
CPA PEP Contractors	contractors@cpawsb.ca Toll Free: 1 866 420.2350 (Press 6 then 1)
CPA preparatory course Contractors	online.adminprep@cpawsb.ca Toll Free: 1 866 420.2350 (Press 6 then 2)