

COMPETENCY-BASED CONFIRMATION OF PRACTICAL EXPERIENCE CERTIFICATE

Use this form if you started employment on or after September 1, 2009, or you are training outside external audit AND you have left employment or you have completed your experience requirements.

If you are submitting this form to begin your application for membership with a provincial institute of Chartered Accountants, check with your provincial institute about any additional requirements. If you are governed by Manitoba or BC, you will also need to complete a Membership Application Record Confirmation Request.

EMAIL the completed form to generalregistrations@casb.com or MAIL it to CA School of Business Student & Support Services/301, 1253 91 Street SW/Edmonton, AB/T6X 1E9. Ensure your employer has signed the last page.

PRINT in capital letters or CLICK in the box to type.

1 Personal Information	
Student name	CASB student number
First Middle Last	
Reporting CA Training Office	City
Reason for submitting this form:	
<input type="checkbox"/> 1. I have completed the practical experience requirements (including minimum chargeable hours required for external audit path if applicable).	
<input type="checkbox"/> 2. I am leaving my position at a CA Training Office and	
<input type="checkbox"/> I have secured a position at a new CA Training Office (complete Section 4);	
<input type="checkbox"/> I have not secured a new position at a CA Training office, but I intend to register in the next available module offering and wish to maintain my CASB student registration;	
<input type="checkbox"/> I am a co-op or summer student returning to university to complete degree/pre-professional education program requirements; or	
<input type="checkbox"/> I want to cancel my CASB student registration as I am no longer pursuing the CA designation.	
<input type="checkbox"/> 3. Other: Please specify (e.g. out of province, international experience)	

2 Calculating Experience	
Complete this section to calculate the amount of experience you have completed. Count 5 working days (maximum) in one calendar week and 21.75 working days (maximum) in one calendar month. Calculate time in total working days. See Section 6 for exclusions and information about overtime.	
Employment type for reporting period:	<input type="checkbox"/> Full-time <input type="checkbox"/> Part-time (attach explanation)
Experience route:	<input type="checkbox"/> Non-external audit (Corporation/Public Sector/Public Practice - Non-assurance) <input type="checkbox"/> External audit (Public practice)
Employment period	Explanation
A Employment start date (mm/dd/yy)	A: This is the date you started working for this employer
B Employment end date (mm/dd/yy)	B: This is either the date you completed 30 months experience <u>or</u> the last day you worked for this employer
C Total number of months worked	C: Enter the total number of months you have worked
D Total number of working days (C x 21.75)	D: Convert months to working days by multiplying C by 21.75 (the maximum number of working days in each month)
E Days excluded	E: Calculate total number of days to be excluded (see Section 6)
F Total experience claimed (D - E)	F: Calculate the experience you are claiming by subtracting E from D
G Previous experience reported to CASB	G: Add any experience you have previously claimed
H Total period of experience to date	H: You need 652.5 working days to meet 30 months experience

3 Chargeable Hours Calculation

Complete this section if you are in the external audit path.

	Audit	Review	Taxation	Other	Total
In reporting CA Training Office	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
With previous CA Training Office (if available)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total chargeable hours completed to date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4 CA Training Office Information

Complete this section if you have not completed 30 months experience.

1 I have left employment with the office listed on Page 1 and:

a. I am starting employment with a new approved CA Training Office (Continue to 2) OR

b. I do not have new approved CA Training Office employment arranged (continue to Section 5)

2 Submit a Change of Training Office form to recognize experience from your new firm

New CA Training Office	Start date (dd/mm/yyyy)	City
<input type="text"/>	<input type="text"/>	<input type="text"/>

5 Certificate Declaration

CA TRAINING OFFICE (completed by Training Principal)

I confirm on behalf of _____ that _____

was in our employ from (mm/dd/yy) _____ to (mm/dd/yy) _____ and completed our CA Training Program which is approved by the Institute of Chartered Accountants of _____.

As part of our CA Training Program, this student's progress has been discussed with his/her Counseling Member at least semi-annually and he/she has met the progression expectations of all students in our CA Training Program.

If the term of the practical experience is complete, please check here:

I recommend this student as being of good moral character and in my opinion he/she should be admitted to membership once he/she has satisfied all requirements to apply for CA membership.

If the term of the practical experience is not yet complete, please check here:

I recommend this student as being of good moral character. During the above term of employment, nothing came to my attention to suggest that he/she should not be admitted to membership once he/she has completed his/her practical experience requirements. In my opinion he/she should be admitted to membership once he/she has satisfied all requirements to apply for CA membership.

Training Principal Name (print)	Training Principal Signature	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Student (complete ONLY if the term of practical experience is complete)

I believe that I have met the practical experience requirements of the CA profession as defined in the CA Practical Experience Requirements.

During my term of practical experience I have gained a depth of experience in _____ and breadth of experience in _____ and _____ as documented in my Record of CA Qualifying Experience as at (mm/dd/yy) _____.

Student Signature	Date
<input type="text"/>	<input type="text"/>

The employment start date is the first day you start working on activities recognized for experience credit according to the Practical Experience Requirements. This is usually the first day of employment. In most cases, all time receives credit, except as noted below.

Time excluded from experience calculation:

- paid or unpaid overtime hours (overtime can be used toward meeting minimum chargeable hour requirements for students in the external audit path);
- paid leaves of absence or other days not on the job taken in lieu of overtime hours;
- paid or unpaid vacation in excess of three weeks a year;
- paid or unpaid days for course(s), other than staff training programs required by the employer;
- paid or unpaid days for study leave or examination(s) except Fridays of face-to-face interactive sessions; and
- sickness, bereavement or other paid or unpaid leaves of absence in excess of a reasonable amount as established by the employer. As a guideline, we recommend that such leaves taken in excess of ten working days a year be excluded from experience calculation.

Accumulated excluded time is deducted from the employment period to determine the total experience claimed.

TYPES OF EXPERIENCE (External audit path only)

Under the 30 month experience model, students in the external audit path must obtain the following minimum number of aggregate chargeable hours:

Minimum total chargeable hours	2,500
Minimum assurance (audit and review) hours	1,250
Minimum audit hours (within 1,250 assurance hours above)	625*
Minimum taxation hours	100

* The Institute of British Columbia allows for a reduction in the minimum audit hour requirement for certification purposes (please review the specific policies of the Institute of British Columbia).

Protection of Privacy - Every effort is made to protect personal information. The personal information requested on this form is collected under applicable federal and provincial legislation and the CA School of Business' policies and guidelines on data management, data access and data use. Information collected relates directly to and is necessary to meet CASB's mandate and responsibilities. It may be used for: admission, registration, academic evaluation, income tax receipts, student dues, convocation, communication with your employer, distribution of educational material and information, statistics, research and other operational activities. Direct any questions about data collection and use to: Director, Student Services, 301, 1253 91 Street SW/Edmonton, AB/T6X 1E9, email - generalregistrations@casb.com, phone - 1 866 420.2350 or local - 780 420.2350.