

**Instructions:**

To enrol into the PER:

1. Read the PER Rules & Regulations and Privacy Statement
2. You must ensure that all sections of this form are completed and signed

**Please note:**

- If your employer is a CPA Australia Recognised Employer Partner, enrol using the *Practical Experience Requirement Enrolment Form – Working for a Recognised Employer*. To download, go to [cpaaustralia.com.au/working\\_rep](http://cpaaustralia.com.au/working_rep)
- Associate members who have previous experience in a professional role can apply for Recognition of Professional Experience. To find out more visit [cpaaustralia.com.au/rpe](http://cpaaustralia.com.au/rpe)

Print clearly in BLOCK letters

**A: Associate member (Mentee) details**

**To be completed by the Associate member**

**A1. Your personal details**

Membership number:

Title: Mr  Mrs  Ms  Miss  Other  Family name:

Given names:

Preferred name\*:  Date of birth:  /  /   
D D M M Y Y

\*This name will be used as a first name in our correspondence

**A2. Your employment details**

Employer name:

Position title:

Employer address:

Suburb / City:  State / Province / Region:

Postcode / ZIP:  Country:

Business phone\*:  Business fax\*:

\*Include international dialling code e.g. +61 3 1234 5678

**A3. Your home contact details**

Home address:

Suburb / City:  State / Province / Region:

Postcode / ZIP:  Country:

Home phone\*:  Mobile\* / Cell phone\*:

\*Include international dialling code e.g. +61 3 1234 5678

**Please indicate which address is your preferred mailing address:**  **Business address**  **Home address**

Please note, by completing the above information your record with CPA Australia will be updated accordingly

**A4. Your email address**

Preferred email:

### Associate member's agreement

By submitting and signing this enrolment form:

- I agree to enrol in the PER
- I confirm that I am currently working in a professional role
- I have read, understood and agree to be bound by the PER Rules & Regulations and the Privacy Statement

Associate member signature

Date:   /   /    
D D / M M / Y Y

### B: Employer contact details

**To be completed by a Human Resources or Learning & Development manager within the Associate member's workplace**

Employer contact's CPA Australia membership number (if applicable):

Title: Mr  Mrs  Ms  Miss  Other  Family name:

Given names:

Preferred name\*:

\*This name will be used as a first name in our correspondence

Employer name:

Position title:

Employer address:

Suburb / City:  State / Province / Region:

Postcode / ZIP:  Country:

Business phone\*:  Business fax\*:

\*Include international dialling code e.g. +61 3 1234 5678

Preferred email:

#### Employer contact's declaration: I declare that:

- I am the contact person for the Associate member identified on this form whilst they undertake the PER and they are employed by the employer identified on this form
- I am authorised to sign this agreement on behalf of the employer
- The employer information provided on this form is correct and will be updated as required
- I have read, understood and agree to be bound by the PER Rules & Regulations and the Privacy Statement

Employer contact signature

Date:   /   /    
D D / M M / Y Y

### C: Mentor details

**To be completed by the new mentor**

#### C1. Mentor's membership details

I am a CPA or FCPA  
Provide your CPA Australia membership number:

**OR**

I am a member of an equivalent IFAC professional body (see 2.3 in Rules & Regulations pg.5)  
Provide your member number:

Name of equivalent professional body you belong to:

## C2. Mentor's personal details

Title: Mr  Mrs  Ms  Miss  Other  Family name:

Given names:

Preferred name\*:

\*This name will be used as a first name in our correspondence

**Preferred email:**

## C3. Mentor's employment details

Employer name:

Position title:

Employer address:

Suburb / City:  State / Province / Region:

Postcode / ZIP:  Country:

Business phone\*:  Business fax\*:

\*Include international dialling code e.g. +61 3 1234 5678

## C4. Mentor's home contact details

Home address:

Suburb / City:  State / Province / Region:

Postcode / ZIP:  Country:

Business phone\*:  Business fax\*:

\*Include international dialling code e.g. +61 3 1234 5678

**Please indicate which address is your preferred mailing address:**  Business address  Home address

Please note, by completing the above information your record with CPA Australia will be updated accordingly

## C5. Start date of mentoring relationship

Start date:  /  /

D D M M Y Y

**Mentor's agreement:** By signing this form:

- I agree to act as the mentor for the applicant, for the purposes of the PER and have been doing so since the date specified in section C5
- I declare that I am a full member of the equivalent professional body as stated above
- I acknowledge that CPA Australia may contact me to verify any of the information provided in this form
- I will not offer or accept any monetary or other remuneration as a result of my role as mentor
- I will not offer my services as a mentor for a fee, to potential mentees
- I have read, understood and agree to be bound by; the PER Rules & Regulations and the Privacy Statement

Mentor signature

Date:  /  /

D D M M Y Y

## Where to send your completed form

### 1. Mail:

CPA Australia Ltd  
Member Advisory and Information Services  
GPO Box 2820  
Melbourne VIC 3001

**2. Email:** A PDF of this completed form can be sent to [ma.comms@cpaustralia.com.au](mailto:ma.comms@cpaustralia.com.au)

**3. Fax:** 1300 78 76 73 (Within Australia) +613 9606 9844 (Outside Australia)

### Please note:

- If you fax or email your form keep a record of this communication (you do not need to mail the original)
- Your form will be processed as soon as possible. Please refer to our website for current processing timeframes:  
**[cpaustralia.com.au/per\\_processing](http://cpaustralia.com.au/per_processing)**
- Once the form is processed, you will be sent a confirmation email. If you do not receive a confirmation email please contact CPA Australia via email: [mais.advisory@cpaustralia.com.au](mailto:mais.advisory@cpaustralia.com.au)

### More information:

If you require more information regarding the practical experience requirement, please refer to CPA Australia's website:  
**[cpaustralia.com.au/per](http://cpaustralia.com.au/per)**

## Practical Experience Requirement – Rules & Regulations

### All parties must read and agree to these Rules & Regulations before signing this form.

CPA Australia Ltd ("CPA Australia") conducts the practical experience requirement (PER) as part of the CPA Program by which Associate members (ASAs) may attain accreditation and advance to CPA status.

CPA Australia accepts no responsibility for, and makes no representations as to the:

- a) qualifications, capacity, character or suitability of mentors to carry out their role, or ASAs to undertake the PER, other than by requiring each to provide a statement/evidence to the effect that they fulfil all requirements for their role, as notified by CPA Australia from time to time;
- b) quality or accuracy of the advice and training provided by mentors to ASAs during the PER, and CPA Australia does not accept responsibility for any form of negligence, recklessness, breach of duty or other misconduct on the part of mentors in providing that support.

CPA Australia does not accept responsibility for any form of loss or liability whatsoever incurred (directly or indirectly) by ASAs arising out of their participation in the PER, irrespective of whether such loss or liability is the result of negligence or other default on the part of CPA Australia.

CPA Australia cannot and does not guarantee the existence, currency or adequacy of professional indemnity or any other insurance held by mentors.

By signing and returning this form to CPA Australia, all participants indicate that they understand and accept to be bound by the PER Rules & Regulations and Privacy Statement. Each participant acknowledges and agrees that:

- each participant has supplied personal information in this form which the other participants will see and use for the purposes described in this form
- each participant will only use the personal information supplied in this form for the purposes described in this form
- CPA Australia will use, store and disclose personal information in accordance with the Privacy Statement
- CPA Australia has no responsibility and accepts no liability for the use or disclosure that one participant makes of the personal information supplied, by another participant

## 1. The Associate member

### Requirements for enrolment

- 1.1 You must complete the PER component of the CPA Program for advancement to CPA status.
- 1.2 You must be an Associate member of CPA Australia to enrol in the PER. ASAs who are working in public practice and completing the CPA Program as a non-member must also enrol in the PER.
- 1.3 You must be working in a professional role. A professional role will require the applicant to develop and demonstrate competency in the 16 sub-skills in the technical, personal effectiveness, business and leadership skill areas.

### Requirements after enrolment

- 1.4 After enrolment, the Associate member will be referred to as the 'mentee'.
- 1.5 An Associate members time on the PER may be backdated if the mentor completes section C5. However the start date for the PER will not be backdated beyond the Associate member join date. If a start date is not provided in section C5, time on the PER will be recognised from the date a completed enrolment form is received by CPA Australia.

- 1.6 You must keep a record of regular communication with your mentor. If you cannot demonstrate regular contact you may not include this period as part of your three year requirement. Communication is encouraged at least once a month and a minimum of 10 hours per year.
- 1.7 You must record the progress of attaining and demonstrating skills to your mentor in your PER guide and logbook. You may be required to submit your logbook if you are selected for review by CPA Australia.
- 1.8 If you end a mentoring relationship, you must advise CPA Australia and your mentor. It is your responsibility to nominate a new mentor.
- 1.9 It is your responsibility to update CPA Australia with your new employer and/or Mentor details. A Practical Experience Requirement Update Form, must be completed each time:
- you change employers. Your Update Form must be submitted within 30 days of the change
  - you end a mentoring relationship and you need to record progress for your PER. Time requirements will be recorded against your CPA Australia record in preparation for advancement to CPA status
  - your employer contact changes
- 1.10 You may take time off the PER for reasons such as travel or maternity leave. If you are not participating in the PER for more than 30 days, you will need to make up this time before advancement to CPA status.
- 1.11 If you are removed from the membership register and subsequently apply for readmission will be able to claim time on the PER provided you have been in regular contact with your mentor and have been working in a professional accounting and/or finance role.
- 1.12 To advance to CPA status, you must complete and demonstrate all time and skill requirements. This will be demonstrated through completion of a Practical Experience Requirement Update Form signed by your mentor and employer contact.
- 1.13 To receive important updates, you are responsible for keeping your contact details current. Update your details at:  
**[cpaaustralia.com.au/managemembership](http://cpaaustralia.com.au/managemembership)**

## 2. The mentor

- 2.1 Eligible mentors must:
- have experience in or work within the accounting and finance fields
  - have experience in supervision, management or mentoring
  - work full time, part time or be retired
  - be prepared to commit to the mentoring relationship for a recommended minimum six-month period and to provide a signed Practical Experience Requirement Update Form at the end of the relationship to confirm what the mentee has achieved
  - let the mentee know if they are no longer on the membership register of the professional body they belong to
  - be of CPA or FCPA status or a full member of a recognised equivalent professional body (see 2.3)
- 2.2 Eligible mentors must not advertise their mentoring services to potential mentees for a fee, nor accept any fee for their mentoring services.
- 2.3 A recognised equivalent professional body is a body which is a full member of The International Federation of Accountants (IFAC). Full members of IFAC are accepted by CPA Australia as eligible mentors. For a full listing, please refer to **<http://web.ifac.org/about/member-bodies>**
- 2.4 CPA Australia strongly recommends the mentor is the immediate supervisor or manager of the mentee (see 4.1).

## 3. The Employer contact

- 3.1 Mentees are required to provide CPA Australia with details of an employer contact person. This person must:
- a) be able to, and agree to, confirm the mentee's employment in a professional accounting or finance role
  - b) be aware of professional development opportunities within the workplace
  - c) be aware and agree, that CPA Australia may contact them for verification by email, whilst the mentee is enrolled in the PER
- 3.2 The employer contact person is required to provide their business email address and business phone number.
- 3.3 The employer contact person is required to sign the testimonial section of the Practical Experience Requirement Update Form at the end of the mentoring period to confirm that the mentee was employed in a professional accounting or finance role.

## 4. The Mentoring relationship

4.1 Each party agrees:

- to conform to the objectives of the PER
- that their behaviour will be ethical, professional and responsible at all times
- that they will participate in the PER in a conscientious and diligent manner, with the utmost good faith towards and in the best interest of all parties
- that by virtue of their participation in the PER, they may have access to confidential information of the other participant and/or workplace evidence and agree not to, during or after their participation in the PER, make improper use of the confidential information.

4.2 The mentee is responsible for driving the mentoring relationship, scheduling meetings and recording all progress throughout their time on the PER. They are also responsible for ensuring the mentor fills in and signs the relevant documentation and for sending any forms to CPA Australia.

4.3 To encourage regular communication, CPA Australia is authorised to provide mentees, mentors and employer contacts with their respective contact details as submitted in this enrolment

4.4 CPA Australia is not authorised to provide any contact details to a mentee, mentor or employer contact after the mentoring relationship has officially ended.

## Privacy Statement

CPA Australia Ltd ("CPA Australia") is committed to protecting the privacy and security of your personal information.

The personal information you provide may be used by CPA Australia to:

- enrol you in the practical experience requirement (PER)
- record your employment details including employer contact details
- record your mentor details including Mentor's employment details
- develop appropriate new products and services
- publicise the PER by identifying you as a participant in the PER
- manage your membership of CPA Australia
- ensure you comply as a member with CPA Australia's Constitution and By-Laws
- aggregate and use for internal review to analyse trends and statistics.

Failure to complete the relevant application correctly may delay or render CPA Australia unable to process your application.

CPA Australia may disclose your personal and/or organisation information you provide to:

- external service providers to whom we have contracted out functions such as printers, mailing houses, IT companies and marketing and communications agencies
- regulatory bodies

The personal and employer's information you provide will be treated by CPA Australia in the following ways:

- your personal information may be transferred or stored outside the country where the personal information was collected for the purposed stated above.
- you have the right to access or correct any personal and employer's information which CPA Australia holds about you (subject to any applicable legal exceptions) and can do this through the "Update my profile" service on the website at **[cpaaustralia.com.au](http://cpaaustralia.com.au)**. You can use this service to opt out of receiving further communications from CPA Australia.

For more information on CPA Australia's Privacy Policy, visit the CPA Australia website at **[cpaaustralia.com.au](http://cpaaustralia.com.au)**