



## Instruction for Completing the Transcript Assessment Application on My Portal

**Note:** Before starting your application, make sure you have your required documents ready. You will be uploading these in the application.

1. Log in to My Portal with your CPA Ontario member ID and password. **For optimal viewing, please use the latest version of Google Chrome.**

To improve your online experience, CPA Ontario has created one point of entry for access to many CPA Ontario online services available to members, students and other stakeholders. To log in, use your CPA Ontario ID and password. You may be prompted to reset your password to ensure it meets our security requirements.

If you are registering for a Professional Development course for the first time, and/or you do not have a CPA Ontario ID, please create an account.

For optimal browser experience, please use the latest version of Microsoft Edge, Google Chrome or Mozilla Firefox. Pages may display incorrectly on mobile devices or in Internet Explorer.

CPA Ontario ID  
Password

LOGIN

[Forgot CPA Ontario ID](#)  
[Reset Password](#)

For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!

2. Click **Start My Journey**.

CPA Ontario

MY PORTAL PROFILE SUPPORT EVENTS

### MY JOURNEY TO BECOMING A CPA

Whether you're a student, a teacher, an internationally educated professional, someone in the workforce, or thinking of moving to Canada, we have an event for you.

[LEARN MORE](#)

Thinking about getting your Chartered Professional Accountant designation? Becoming a CPA is your ticket to a world of opportunities in accounting, finance or business. CPAs are in-demand thanks to their financial expertise, strategic thinking, business insight and leadership skills. By attending an information session or an event, you'll be well equipped and one step closer to starting a successful career as a CPA.

[FIND AN EVENT](#)

**START MY JOURNEY**

**CONTACT US**

**BECOME A CPA TODAY**

Ready to become a CPA? Click below to start your journey.

**QUESTIONS?**

Email us at [becomecpa@cpaontario.ca](mailto:becomecpa@cpaontario.ca).

3. Select **CPA Professional Education Program / CPA Preparatory Courses** and **Confirm**.

**CPA**  
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MY PORTAL PROFILE SUPPORT EVENTS

### SELECT YOUR PROGRAM PATHWAY

CHARTERED PROFESSIONAL ACCOUNTANTS

CPA PROFESSIONAL EDUCATION PROGRAM / CPA PREPARATORY COURSES

Select this option if you have completed or are in the process of completing the entrance prerequisites for admission into the CPA Professional Education Program (CPA PEP). This includes degree conferral, 120 credit hours of academic study, and completion of courses covering specific CPA competencies.

**SELECT**

CPA-ACCREDITED PROGRAM

Select this option if you have been accepted into a graduate level program at a CPA-Accredited post-secondary institution in Ontario. Students who successfully complete the CPA-Accredited program are eligible for advanced standing in the CPA Professional Education Program (CPA PEP).

**SELECT**

INTERNATIONALLY TRAINED ACCOUNTANT

Select this option if you are a member in good standing with a member body of the International Federation of Accountants (IFAC). For more information, please visit [IFAC Member Organizations and Country Profiles](#).

**SELECT**

**CPA**  
ONTARIO

MY PORTAL PROFILE SUPPORT EVENTS

### CONFIRM

Do you want to proceed with your choice?

**NO** **YES**

Select this option if you have completed or are in the process of completing the entrance prerequisites for admission into the CPA Professional Education Program (CPA PEP). This includes degree conferral, 120 credit hours of academic study, and completion of courses covering specific CPA competencies.

**SELECT**

CPA-ACCREDITED PROGRAM

Select this option if you have been accepted into a graduate level program at a CPA-Accredited post-secondary institution in Ontario. Students who successfully complete the CPA-Accredited program are eligible for advanced standing in the CPA Professional Education Program (CPA PEP).

**SELECT**

INTERNATIONALLY TRAINED ACCOUNTANT

Select this option if you are a member in good standing with a member body of the International Federation of Accountants (IFAC). For more information, please visit [IFAC Member Organizations and Country Profiles](#).

**SELECT**

**CANCEL**

4. Click **Start Self-Assessment** and enter your education history. Click **Continue** to proceed to the next page.

**Note:** For **Students or Graduates from Outside Ontario**, you can still add your post-secondary institution, but you will not be able to add your courses. CPA Ontario is working towards expanding the list of courses and post-secondary institutions that can be added to the self-assessment tool. **You will still need to start the self-assessment in order to proceed to the transcript assessment application.** You may skip past the results and select **Return to Dashboard**.

The screenshot shows the CPA Ontario My Portal dashboard. The top navigation bar includes 'MY PORTAL', 'PROFILE', 'SUPPORT', and 'EVENTS'. The left sidebar contains a user profile section with 'CPA Ontario ID' and 'Status: Active', followed by a 'STUDENT DASHBOARD' menu with options: 'MANAGE MY JOURNEY', 'OBLIGATIONS & REQUESTS', 'ANNUAL OBLIGATIONS', and 'APPLICATIONS'. The main content area is titled 'MY JOURNEY TO BECOMING A CPA' and shows the 'PROGRAM PATHWAY: CPA PROFESSIONAL EDUCATION PROGRAM / CPA PREPARATORY COURSE'. A 'CHANGE PROGRAM' button is visible. Below this, there are two sections: 'START A SELF-ASSESSMENT' with a 'START SELF-ASSESSMENT' button highlighted by a green box, and 'SELECT A REGISTRATION CATEGORY' with a 'PENDING' status.

The screenshot shows the 'COMPLETE YOUR SELF-ASSESSMENT' page. The top navigation bar is the same as the previous screenshot. The page title is 'COMPLETE YOUR SELF-ASSESSMENT'. Below the title is a progress indicator with three steps, the first of which is active. The main heading is 'CPA TRANSCRIPT SELF-ASSESSMENT'. The text on the page includes: 'Congratulations on taking the first step towards earning the CPA designation.', 'The self-assessment tool helps determine if you have any outstanding prerequisites for entry into the CPA Professional Education Program (CPA PEP). Outstanding prerequisites can be completed through CPA preparatory courses or through a post-secondary institution.', a 'Please note' section regarding availability for students or graduates of post-secondary institutions in Ontario, and a note about contacting support in case of a discrepancy. At the bottom, there are two buttons: 'SAVE AND EXIT' and 'CONTINUE', with the 'CONTINUE' button highlighted by a green box.

## COMPLETE YOUR SELF-ASSESSMENT



### EDUCATION HISTORY

Enter your education and course history below. Any information you provide as part of your self-assessment will appear on your Transcript Assessment application.

**NOTE:** If you have completed any courses from a post-secondary institution that is not recognized by CPA Ontario, they will not be reflected in the results and will require further review. Click [here](#) for a list of academic prerequisites and recognized courses.

\* Indicates required field(s)

+ ADD A POST-SECONDARY INSTITUTION

BACK CONTINUE

## COMPLETE YOUR SELF-ASSESSMENT

### ADD A POST-SECONDARY INSTITUTION

\* Country

\* Other Post-Secondary Institution (PSI)

\* Other Program Name

\* Program Start Date

\* Program Status

CANCEL SAVE

**Note:** Review the information you have entered and edit if you need to.

MY PORTAL PROFILE SUPPORT EVENTS

## COMPLETE YOUR SELF-ASSESSMENT

### EDUCATION HISTORY

Enter your education and course history below. Any information you provide as part of your self-assessment will appear on your Transcript Assessment application.

**NOTE:** If you have completed any courses from a post-secondary institution that is not recognized by CPA Ontario, they will not be reflected in the results and will require further review. Click [here](#) for a list of academic prerequisites and recognized courses.

\* Indicates required field(s)

[Redacted]

EDIT X

Program Start Date	Program Status
[Redacted]	Qualification Conferred
Qualification Conferral Date	Expected Completion Date
[Redacted]	
Official Transcript Required?	Official Transcript Received?
[Redacted]	[Redacted]
Date Official Transcript Received	

---

COURSE

\_\_\_\_\_

No Subject Area has been added!

+ ADD A POST-SECONDARY INSTITUTION

BACK CONTINUE

- Review your results and click **Return to Dashboard**.

**Note:** For **Students or Graduates from Outside Ontario**, please bypass this results page and click Return to Dashboard.



[MY PORTAL](#)
[PROFILE](#)
[SUPPORT](#)
[EVENTS](#)

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## YOUR RESULTS

The results of your self-assessment are **unofficial** and intended only as a guide. An official transcript assessment is required in order to begin your student registration process. Courses that have not been pre-approved by CPA Ontario, including courses completed outside of Ontario, will be reviewed for equivalency as part of an official transcript assessment.

**Note:** The Self-Assessment assesses all Information Technology (ITE) equivalent courses as core (90% minimum grade requirement, 10-year currency). If your ITE-equivalent course(s) were completed prior to May 2022, they will be assessed as non-core by our assessors once you submit your application.

**CPA Ontario ID:** [REDACTED]

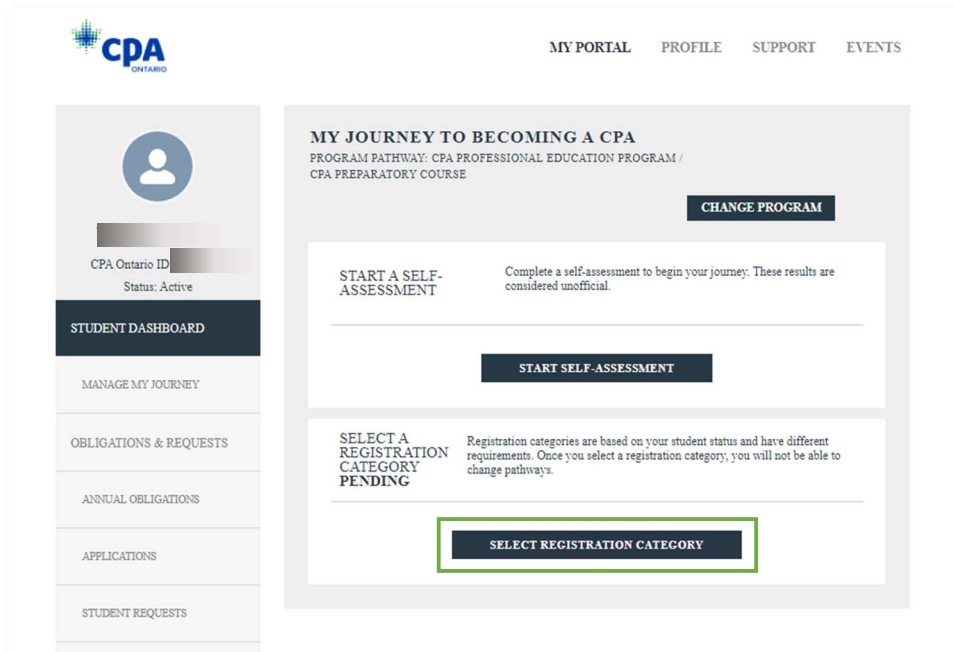
**Degree Requirement:**

CPA COMPETENCY AREA	COURSE NAME	STATUS	STATUS REASON	NOTES	CURRENCY EXPIRY DATE
FINANCIAL REPORTING	CPA PFP Postgraduate - FA	Required			
MANAGEMENT ACCOUNTING	CPA PFP Postgraduate - MA	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PFP Postgraduate - ECO	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PFP Postgraduate - STA	Required			
FINANCIAL REPORTING	CPA PFP Postgraduate - FI	Required			
FINANCIAL REPORTING	CPA PFP Postgraduate - FI2	Required			
FINANCIAL REPORTING	CPA PFP Postgraduate - AF	Required			
FINANCE	CPA PFP Postgraduate - COE	Required			
AUDIT AND ASSURANCE	CPA PFP Postgraduate - AEA	Required			
TAXATION	CPA PFP Postgraduate - TAX	Required			
MANAGEMENT ACCOUNTING	CPA PFP Postgraduate - MAA	Required			
STRATEGY AND GOVERNANCE	CPA PFP Postgraduate - SMA	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PFP Postgraduate - BEL	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PFP Postgraduate - ITE	Required			
	CPA PFP Core 1	Required			
	CPA PFP Core 2	Required			
	CPA PFP Elective Assurance	Required			
	CPA PFP Elective Professional Management	Required			
	CPA PFP Elective Taxation	Required			
	CPA PFP Elective Finance	Required			
	CPA PFP Capstone 1	Required			
	CPA PFP Capstone 2	Required			
	Common Final Exams	Required			

If you would like to complete a self-assessment for your current or prospective employment as meeting the CPA Practical Experience Requirements, please visit [the practical experience self-assessment page](#).

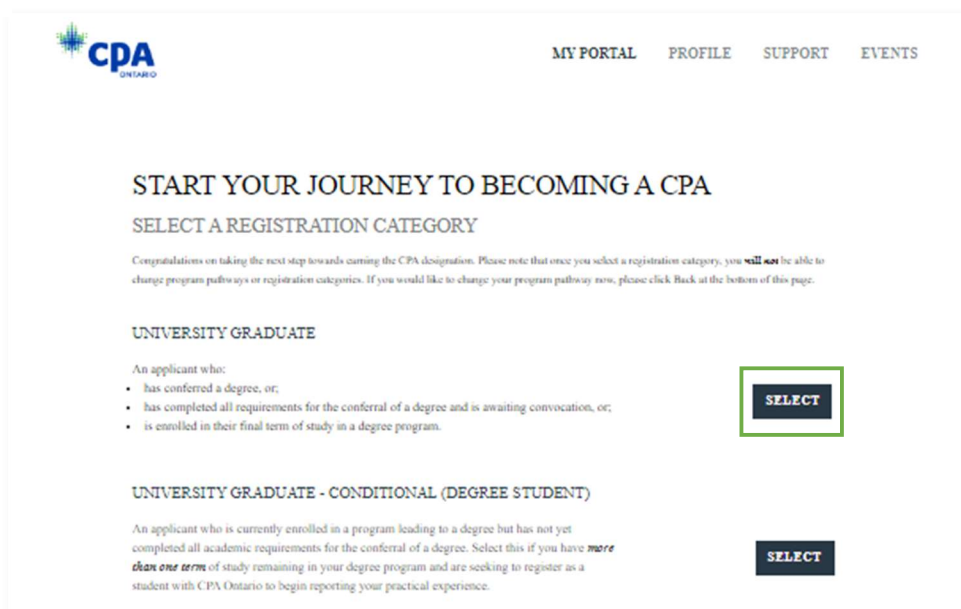
RETURN TO DASHBOARD

6. Click **Select Registration Category**.



7. Select your Registration Category.

**Note:** If you have a degree from a post-secondary institution **outside Ontario**, still select the **University Graduate Category**.



**UNIVERSITY GRADUATE - CONDITIONAL (NON-DEGREE STUDENT)**

An applicant who is no longer enrolled in a program leading to a degree but has completed at least **30 credit hours** of study at an academic institution.

**SELECT**

**MATURE**

An applicant who does not have and does not intend to complete a university degree but has completed **eight** years of relevant work experience that is satisfactory to the Registrar. Relevant experience for this category is defined as two technical competencies developed to at least a Level 1 proficiency. For more information on the CPA Practical Experience Requirements and the related proficiency levels, please [click here](#).

**SELECT**

**MATURE - CONDITIONAL**


An applicant who does not have and does not intend to complete a university degree but has completed **three** years of relevant work experience that is satisfactory to the Registrar. Relevant experience for this category is defined as two technical competencies developed to at least a Level 0 proficiency. For more information on the CPA Practical Experience Requirement and the related proficiency levels, please [click here](#).

**SELECT**

**NOTE:** If you do not meet any of the requirements for the above registration categories, please contact CPA Ontario for more information.

**BACK**

## 8. Select your **Application Type**.

 **CPA**  
ONTARIO

MY PORTAL   PROFILE   SUPPORT   EVENTS

**START YOUR JOURNEY TO BECOMING A CPA**

**APPLICATION TYPE**

Select your application type. For a full list of fees, [click here](#).

**TRANSCRIPT ASSESSMENT**

This option is for applicants looking to apply for a transcript assessment but do not wish to proceed with their student registration at this time.

**SELECT**

**TRANSCRIPT ASSESSMENT AND STUDENT REGISTRATION (CPA COMBINED APPLICATION)**

This option is for applicants wishing to apply for a transcript assessment and begin their student registration process. Once we process your application, you will receive results for both your transcript assessment and student registration. Please only select this option if you are comfortable registering as a student prior to accessing your transcript assessment results as all student registration fees are non-refundable.

**SELECT**

**BACK**



## 9. Confirm your Registration Category and Application Type.

**CPA ONTARIO** MY PORTAL PROFILE SUPPORT EVENTS

### CONFIRM REGISTRATION CATEGORY AND APPLICATION TYPE

You have selected 'University Graduate' as your registration category. You will proceed to 'CPA Transcript Assessment'. Do you wish to proceed?

This option is for applicants looking to apply for a transcript assessment but do not wish to proceed with their student registration at this time.

#### TRANSCRIPT ASSESSMENT AND STUDENT REGISTRATION (CPA COMBINED APPLICATION)

This option is for applicants wishing to apply for a transcript assessment and begin their student registration process. Once we process your application, you will receive results for both your transcript assessment and student registration. Please only select this option if you are comfortable registering as a student prior to accessing your transcript assessment results as all student registration fees are non-refundable.

## 10. Click Start Transcript Assessment.

**CPA ONTARIO** MY PORTAL PROFILE SUPPORT EVENTS

### MY JOURNEY TO BECOMING A CPA

PROGRAM PATHWAY: CPA PROFESSIONAL EDUCATION PROGRAM / CPA PREPARATORY COURSE

**START A SELF-ASSESSMENT** Complete a self-assessment to begin your journey. These results are considered unofficial.

**SELECT A REGISTRATION CATEGORY DONE** Registration categories are based on your student status and have different requirements. Once you select a registration category, you will not be able to change pathways.

**START A TRANSCRIPT ASSESSMENT OPEN** Complete a transcript assessment to have your education and course history reviewed by CPA Ontario. These results are considered official.

**STUDENT REGISTRATION OPEN** Apply to register as a student with CPA Ontario. Once approved, you will be able to enrol in courses, modules, and exams, as well as record your practical experience.

**STUDENT DASHBOARD**

- MANAGE MY JOURNEY
- OBLIGATIONS & REQUESTS
- ANNUAL OBLIGATIONS
- APPLICATIONS
- STUDENT REQUESTS
- FINANCIAL HISTORY


**Tip:** Use the navigation buttons at the bottom of each page to easily move through and save the application. Most pages include three navigation buttons: **Back, Save and Exit, and Continue.**

- **Back** - Navigate back to the previous page of the application. Note this button does not appear on the payment page.
- **Save and Exit** - Select this button to exit your application and save the information entered up to and including that page. Note that information may be lost if you leave your application open without saving for an extended period.
- **Continue** - Proceed to the next page of the application.

11. Read the information on this page carefully and ensure that you have compiled all the required documents to upload on the following pages. **Mark the Attestation Box** before clicking **Continue**.

**Note:** For Proof of Legal Name, you only need to upload **one** document from the list below.

**Important:** Read and take note of the text in **red** below.

MY PORTAL PROFILE SUPPORT EVENTS

## COMPLETE YOUR TRANSCRIPT ASSESSMENT

### BEFORE YOU BEGIN

**Please read the following important information:**

- Official transcripts for Canadian institutions must be mailed directly to our office or sent electronically via an approved credential platform including [Parchment](#), [MyCreds](#) and [The National Student Clearinghouse](#).
- If your academic institution is not mailing or providing digital transcripts via one of the secure methods listed above, we can accept unofficial transcripts on a temporary basis.

**For education outside of Canada, including the USA: Please submit a WES ICAP evaluation. WES evaluations are automatically sent to CPA Ontario electronically via a secure channel. If you are unable to provide a WES ICAP evaluation at this time, and your transcripts are not in English, they must be translated into English by an [ATTO-certified](#) translator. Upload the translations along with the unofficial transcripts on the Education History page of the application.**

**All official transcripts (for Canadian education) and WES ICAP evaluations (for education outside of Canada) will be required at a later date if not provided at the time of your application. Please submit these documents as soon as you are able to.**

Before starting this application, ensure that you have gathered all required documents and information (see below). Documents can be uploaded into the online application except when **originals are required**. Please note, once you begin the online process, you cannot exit and return to the application. You must complete the application in its entirety. Incomplete submissions may result in delays and additional fees.

### IMPORTANT DOCUMENTS

#### PROOF OF LEGAL NAME

You will be required to provide your legal last name as part of the application. Acceptable proof of legal name documents include:

- birth certificate
- passport
- Canadian citizenship certificate or card (both sides)
- permanent resident card (both sides)
- landing immigration papers
- Canadian driver's license
- NEXUS identification card

If you've changed your legal name, you will be required to provide documentation for proof of name change.

#### TRANSCRIPTS

If you have completed relevant education *within* Canada, **official transcript(s)** are required in order to begin processing your application. In order for a transcript to be considered official, your post-secondary institution's Registrar's office must send them directly to CPA Ontario in a sealed envelope.

If you have completed relevant education *outside of* Canada, a **Course-by-Course** credential evaluation carried out by [World Education Services \(WES\)](#) through their International Credential Advantage Package (ICAP) is required. This credential evaluation must be sent directly to CPA Ontario by WES.

The mailing address for CPA Ontario is:

130 King Street West, Suite 3400  
PO Box 358  
Toronto, Ontario M5X 1E1

If you are required to submit **unofficial transcript(s)**, you will be able to upload PDF copies as part of this application.

#### CRIMINAL OFFENCE

If you have ever been found guilty of a criminal offence or other similar offence for which a pardon has not been granted, or if you have any charges pending against you, you will be required to provide supplemental documentation.

#### BANKRUPTCY

You will be required to provide supplemental documentation if, as set out in the Bankruptcy and Insolvency Act, you:

- Have become the subject of an application for a bankruptcy order.
- Made an assignment for the general benefit of creditors.
- Made or are becoming the subject of a Division I or Division II proposal.
- Had a business of which you control, directly or indirectly, that became subject to a bankruptcy order.

### IMPORTANT INFORMATION

#### COURSE INFORMATION

You will be required to provide the following course information:

- Post-secondary institutions you attended.
- Courses you have taken.
- Grades you received.
- PDF copies of your course outlines to provide additional information on course content, where appropriate.

**NOTE:** All requests for additional information must be fulfilled within 60 days. Failure to do so will result in file closure and a new application may be required to restart the assessment process. Only completed applications will be reviewed. Documents submitted after transcript assessment results are provided will result in a reassessment fee of \$150 (plus HST).

\* Indicates required field(s)

#### ATTESTATION


I declare that the information provided will be accurate, true, and complete. I confirm that I understand and agree that I am bound by the By-Laws and Regulations of CPA Ontario, and I will promptly provide any further information or documentation requested by CPA Ontario.

BACK

SAVE AND EXIT

CONTINUE

12. Complete your Applicant Profile and Upload the Required Documents. Click **Continue** to proceed to the next pages and Click **Submit Application** to proceed to the payment page.


 MY PORTAL PROFILE SUPPORT EVENTS

### COMPLETE YOUR TRANSCRIPT ASSESSMENT

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#### COMPLETE YOUR APPLICANT PROFILE

Prefix [Dropdown]	*Legal First Name(s) [Text]
*Preferred First Name [Text]	*Legal Last Name [Text]
*Preferred Last Name [Text]	*Date of Birth [Date Picker]
Former First Name * [Text]	Do you identify as an indigenous person? [No] [Dropdown]
Former Last Name * [Text]	Indigenous Group [--None--] [Dropdown]
Suffix [--None--] [Dropdown]	Is English your first language? * [Yes] [Dropdown]
Gender [Female] [Dropdown]	

 MY PORTAL PROFILE SUPPORT EVENTS

[Female] [Dropdown]

#### HOME ADDRESS

\*Preferred Mailing Address  
[Text]

Residential Address Residential Country  
[Canada] [Dropdown]

Residential Street  
[Text]

Residential City Residential State/Province  
[Text] [Dropdown]

Residential Zip/Postal Code  
[Text]

Other Address Other Country  
[Text] [Dropdown]

Other Street  
[Text]

Other City Other State/Province  
[Text] [--None--] [Dropdown]

Other Zip/Postal Code  
[Text]

### CONTACT INFORMATION

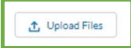
*Preferred Phone	*Preferred Email
<input type="text"/>	<input type="text"/>
Home Phone	Alternate Email
<input type="text"/>	<input type="text"/>
Business Phone	Mobile Phone
<input type="text"/>	<input type="text"/>

### UPLOAD PROOF OF LEGAL NAME

Your legal name must match your transcripts and proof of legal name document. Acceptable proof of legal name documents include:

- birth certificate
- passport
- Canadian citizenship certificate or card (both sides)
- permanent resident card (both sides)
- landing immigration papers
- Canadian driver's license
- NEXUS identification card


Please upload your files



### UPLOAD PROOF OF NAME CHANGE

If your current legal name differs from the name on your transcript(s) and/or supporting documents, you are required to provide documentation showing your change of legal name.

Please upload your files



Please review and address all issues before saving.

<input type="button" value="BACK"/>	<input type="button" value="SAVE AND EXIT"/>	<input type="button" value="CONTINUE"/>
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**Note:** Please carefully read the information below.

The screenshot shows the CPA Ontario website interface. At the top left is the CPA Ontario logo. To the right are navigation links: MY PORTAL, PROFILE, SUPPORT, and EVENTS. The main heading is 'COMPLETE YOUR TRANSCRIPT ASSESSMENT'. Below this is a progress indicator with five steps, the second of which is active. The section is titled 'EDUCATION HISTORY'. The text reads: 'Enter your education and course history. The information that you provided as part of your self-assessment is included below. You will be required to provide a transcript for every post-secondary institution you list.' A note follows: 'NOTE: If you have completed courses from a post-secondary institution that is not recognized by CPA Ontario, you will be required to upload an unofficial transcript as well as course outlines for each course that you would like CPA Ontario to review. In order to upload course outlines, add the post-secondary institution and click on Add a Course. You will then be prompted to upload your documents.' A final note states: 'For any courses not recognized by CPA Ontario, you may also complete the Applicant Self-Assessment Tool which will allow you to indicate the topics you completed as part of your studies and determine your eligibility for any potential exemptions or challenge exams. For more information and to download the tool, please click here. Please note that you will need to submit the completed tool with your application by uploading it on this page, under the institution in which the courses were completed.' A small asterisk indicates required fields.

**Note:** Upload your transcripts. **Click the Upload Files Button** and you will be prompted to upload your documents.

If you have transcripts from **multiple Post-Secondary Institutions**, you will need to upload those as well. That will be covered on the page below.

The screenshot shows the CPA Ontario website interface with an 'Upload Files' dialog box open. The background page shows a form with fields for 'Program Start Date', 'Program Status', 'Qualification Conferred', 'Qualification Conferal Date', 'Expected Completion Date', 'Official Transcript Required?' (Yes/No), 'Official Transcript Received?' (No), and 'Date Official Transcript Received'. There are 'EDIT' and 'X' buttons at the top right of the form. The 'Upload Files' dialog box has a title bar 'Upload Files' and a close button. It shows a file named '7738' with a progress bar and a green checkmark. Below the file list, it says '1 of 1 file uploaded' and has a 'Done' button highlighted with a green box.

If you have transcripts from **multiple Post-Secondary Institutions**, Click **Add a Post-Secondary Institution**, input the required information, then **Upload your Transcript**.

Click **Continue** to proceed to the next page.

**Note:** For **Students or Graduates from Outside Ontario**, please ignore the Self-Assessment Results and Click **Continue**.

**CPA Ontario ID:** [REDACTED]

**Degree Requirement:**

CPA COMPETENCY AREA	COURSE NAME	STATUS	STATUS REASON	NOTES	CURRENCY EXPIRY DATE
FINANCIAL REPORTING	CPA PEP Prerequisite - IFA	Required			
MANAGEMENT ACCOUNTING	CPA PEP Prerequisite - IMA	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PEP Prerequisite - ECO	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PEP Prerequisite - STA	Required			
FINANCIAL REPORTING	CPA PEP Prerequisite - IF1	Required			
FINANCIAL REPORTING	CPA PEP Prerequisite - IF2	Required			
FINANCIAL REPORTING	CPA PEP Prerequisite - AFR	Required			

**Degree Requirement:**

STAKEHOLDERS AND GOVERNANCE	CPA PEP Prerequisite - PIA	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PEP Prerequisite - EUL	Required			
OTHER GENERAL BUSINESS TOPICS	CPA PEP Prerequisite - ITE	Required			
	CPA PEP Core 1	Required			
	CPA PEP Core 2	Required			
	CPA PEP Elective: Assurance	Required			
	CPA PEP Elective: Performance Management	Required			
	CPA PEP Elective: Taxation	Required			
	CPA PEP Elective: Finance	Required			
	CPA PEP Capstone 1	Required			
	CPA PEP Capstone 2	Required			
	Common Final Exam	Required			

If you would like to complete a self-assessment for your current or prospective employment as meeting the CPA Practical Experience Requirements, please visit [the practical experience self-assessment page](#).

**BACK** **SAVE AND EXIT** **CONTINUE**

## COMPLETE YOUR TRANSCRIPT ASSESSMENT

### EMPLOYMENT INFORMATION

\* Indicates required field(s)

\* Employment Status

--Select a Value--

- Employed
- Unemployed
- Retired

BACK SAVE AND EXIT CONTINUE

**Note:** Review the information you have entered.

## COMPLETE YOUR TRANSCRIPT ASSESSMENT

### REVIEW YOUR APPLICATION

Prefix --None--	Legal First Name(s) [Redacted]
Preferred First Name [Redacted]	Legal Last Name [Redacted]
Preferred Last Name [Redacted]	Date of Birth [Redacted]
Former First Name *	Do you identify as an indigenous person? --None--
Former Last Name *	Indigenous Group --None--
Suffix --None--	Is English your first language? * --None--
Gender --None--	



--None--

### HOME ADDRESS

Preferred Mailing Address

Residential

Residential Address Residential Country

Residential Street

Residential City Residential State/Province

Residential Zip/Postal Code

Other Address Other Country

Other Street

Other City Other State/Province

Other Zip/Postal Code

### CONTACT INFORMATION

Preferred Phone Preferred Email

Home Phone Alternate Email

Business Phone Mobile Phone

### UPLOAD PROOF OF LEGAL NAME

Your legal name must match your transcripts and proof of legal name document. Acceptable proof of legal name documents include:

- birth certificate
- passport
- Canadian citizenship certificate or card (both sides)
- permanent resident card (both sides)
- landing immigration papers
- Canadian driver's license
- NEXUS identification card

Please review your files	
Title	File Type
	PNG

### UPLOAD PROOF OF NAME CHANGE

If your current legal name differs from the name on your transcript(s) and/or supporting documents, you are required to provide documentation showing your change of legal name.

Please review your files	
Title	File Type
	PNG


Enter your education and course history. The information that you provided as part of your self-assessment is included below. You will be required to provide a transcript for every post-secondary institution you list.

**NOTE:** If you have completed courses from a post-secondary institution that is not recognized by CPA Ontario, you will be [required to upload an unofficial transcript](#) as well as course outlines for each course that you would like CPA Ontario to review. In order to upload course outlines, add the post-secondary institution and click on Add a Course. You will then be prompted to upload your documents.

For any courses not recognized by CPA Ontario, you may also complete the Applicant Self-Assessment Tool which will allow you to indicate the topics you completed as part of your studies and determine your eligibility for any potential exemptions or challenge exams. For more information and to download the tool, please [click here](#). Please note that you will need to submit the completed tool with your application by uploading it on this page, under the institution in which the courses were completed.

\* Indicates required field(s)

[Redacted]	
[Redacted]	
Program Start Date	Program Status
[Redacted]	[Redacted]
Qualification Conferral Date	Expected Completion Date
[Redacted]	[Redacted]
Official Transcript Required?	Official Transcript Received?
[Redacted]	[Redacted]
Date Official Transcript Received	
[Redacted]	
Upload unofficial Transcript. If you need to upload any supplemental documents, such as a Transfer Credit Letter, please do so here.	
Please review your files	
[Redacted]	
Title	File Type
[Redacted]	PNG



[MY PORTAL](#)
[PROFILE](#)
[SUPPORT](#)
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**COURSE**

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No Subject Area has been added!

\* Indicates required field(s)

Employment Status

Unemployment Start Date

Note: Review the information on this page before clicking **Submit Application**.



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DOCUMENTS TO BE MAILED

**Please read the following important information:**

- Official transcripts for Canadian institutions must be mailed directly to our office or sent electronically via an approved credential platform including [Parchment](#), [MyCreds](#) and [The National Student Clearinghouse](#).
- If your academic institution is not mailing or providing digital transcripts via one of the secure methods listed above, we can accept unofficial transcripts on a temporary basis.

For education outside of Canada, including the USA: Please submit a WES ICAP evaluation. WES evaluations are automatically sent to CPA Ontario electronically via a secure channel. If you are unable to provide a WES ICAP evaluation at this time, and your transcripts are not in English, they must be translated into English by an [AITO-certified](#) translator. Upload the translations along with the unofficial transcripts on the Education History page of the application.

All official transcripts (for Canadian education) and WES ICAP evaluations (for education outside of Canada) will be required at a later date if not provided at the time of your application. Please submit these documents as soon as you are able to.

- For any Canadian post-secondary institution that you have listed in your education history for which you have completed your studies and/or conferred a degree, please have your post-secondary institution's Registrar's office send your transcript(s) directly to CPA Ontario in a sealed envelope.
- For any non-Canadian post-secondary institution that you have listed in your education history for which you have completed your studies and/or conferred a degree, please submit a Course-by-Course ICAP credential evaluation from [World Education Services Canada \(WES\)](#).
- If you wish to view your list of post-secondary institutions after you have submitted your application, please click on the 'Education History' button on your Dashboard.
- **Note:** CPA Ontario will not commence the review of your application until all required documents have been received.

13. Pay for the Transcript Assessment Application Fee.

Application	Cost
Transcript Assessment Application	\$150 + HST
Combined Application (transcript assessment + Annual Student Dues + \$125 initial administration fee)	Jan 1-June 30: \$875 + HST July 1-Dec 31: \$575 + HST

The screenshot shows the CPA Ontario payment portal. The top navigation bar includes 'MY PORTAL', 'PROFILE', 'SUPPORT', and 'EVENTS'. The main content area is divided into two columns. The left column is titled 'PAYMENT INFORMATION' and contains two sections: '1. Tax Address' and '2. Choose a Payment Method'. Under '1. Tax Address', there is a 'Residential' radio button and a 'Change' link. Under '2. Choose a Payment Method', there are two options: 'Credit Card' and 'Interac'. The 'Credit Card' option is selected, and it includes fields for 'Card Holder Name', 'Card Number', 'CVV', 'Exp Month', and 'Exp Year'. Below these fields is a 'Billing Address' section with a '+ New Address' button and a 'Residential' radio button. A 'Process Payment' button is located at the bottom of the payment information section. The right column is titled 'ORDER TOTAL' and shows a total of \$169.50. Below this is a 'SHOPPING CART' section with '1 ITEM'. The item is 'CPA Transcript Assessment Fee' with a quantity of 1, a unit price of \$150.00, and a total price of \$150.00. An 'UPDATE CART' button is located below the shopping cart.

14. Wait for your Transcript Assessment Results. You will be notified via email.

Your application will take four to six weeks if you are educated in Canada. Your assessment cannot begin until **ALL** the required documentation is received. Incomplete submissions will result in delays.

## Frequently Asked Questions:

### **Do I need to provide a course syllabus/outline?**

If you have completed a degree credit course that is not listed on the [CPA approved course maps](#) and would like the course reviewed for recognition, the syllabus you submit should indicate sufficient coverage of key topics. CPA Ontario will review the course syllabus and confirm that the course completed covers the subjects contained in the CPA competency map. Only syllabi that are relevant to the program prerequisite and cover key topics are needed.

### **I completed my core courses 10+ years ago. What is my next step?**

Core courses completed 10+ years ago related to preparatory courses is outside of our currency requirements. Once you receive your transcript assessment results, you may request to have relevant practical work experience reviewed for any equivalent courses you have completed that are over 10 years.

Please upload course outlines on the Education History page of your application for us to determine if your courses are equivalent and to determine eligibility to complete the additional **currency of education exemption application form**. Once you receive your transcript assessment results and would like to request for the exemption form, please contact our team at [transcriptregistration@cpaontario.ca](mailto:transcriptregistration@cpaontario.ca).

### **Can I submit transcripts for courses I completed from other professional accounting bodies?**

We only assess degree-credit courses (i.e. Bachelor's, Master's, Doctorate). This does not include courses from professional accounting bodies. If you are a member of a professional accounting body outside Canada, you will need to apply via the Internationally Trained Accountant pathway and will not be required to complete a transcript assessment application.

### **Should I send my official transcripts before or after I submit the Transcript Assessment Application?**

Before starting your application, make sure you have the required documents and information ready. All official transcripts (for Canadian Education) will be required at the time of your application.

### **I'm in my final semester. Can I submit my unofficial transcripts?**

We accept unofficial transcripts for this group. Upload your unofficial transcripts in your transcripts assessment application and then submit your official transcript as soon as you graduate. You must arrange for all official university and college transcripts to be mailed directly to CPA Ontario in a sealed envelope from the institution's Registrar's Office or emailed directly to CPA Ontario through an approved education credential platform (i.e.

Parchment, MyCreds, National Student Clearinghouse) to  
transcriptregistration@cpaontario.ca

**I am waiting for my University/College to send my official transcripts to CPAO. Can I submit my transcript assessment application now?**

Before starting your application, make sure you have the required documents and information ready. All official transcripts (for Canadian Education) will be required at the time of your application.

We will only start the review process once we receive your official transcripts from your University/College.

**I have received my transcript assessment results from another CPA Provincial Body and would like to transfer it to CPA Ontario. What are my next steps?**

If the assessment is still valid (not expired), you can contact your CPA Provincial Body and they will walk you through the process.

Please note that CPA Ontario has no obligation to accept the results and will still do our own assessment.

**I completed a new course that is not included on my previous assessment. Do I need to submit a reassessment application and pay the fee?**

If you have completed additional courses through one of the [recognized Post-Secondary Institutions](#) since your previous assessment, you will have to apply and pay a re-assessment fee of \$150 + Tax for the additional courses.

The only exception is if you were already enrolled in those courses at the time of your initial assessment, and the transcript showed that those courses were in-progress (usually an IP status). In that case we wouldn't charge a reassessment fee.

If you completed a preparatory course **through CPA Ontario after your previous assessment**, you wouldn't need to apply for a reassessment.

**More information or questions regarding your transcript assessment application:**

[transcriptregistration@cpaontario.ca](mailto:transcriptregistration@cpaontario.ca)