



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

BECOME A CPA TODAY

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

START MY JOURNEY

QUESTIONS?

Email us at becomecpa@cpaontario.ca.

CONTACT US

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

CPA
ONTARIO

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 **Internationally Educated Professionals**, 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 'MY JOURNEY TO BECOMING A CPA' 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' with the sub-header 'PROGRAM PATHWAY: CPA PROFESSIONAL EDUCATION PROGRAM / CPA PREPARATORY COURSE'. A 'CHANGE PROGRAM' button is visible. Below this, there are two main 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 page. The main heading is 'COMPLETE YOUR SELF-ASSESSMENT'. Below the heading is a progress indicator with three steps, the first of which is active. The page title is 'CPA TRANSCRIPT SELF-ASSESSMENT'. The content includes a congratulatory message: 'Congratulations on taking the first step towards earning the CPA designation.' It also explains the purpose of the self-assessment tool and provides a 'Please note' section regarding availability for students or graduates of post-secondary institutions in Ontario. At the bottom, there is a note about discrepancies and a legend: '* Indicates required field(s)'. Two buttons are at the bottom: '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)

| | |
|-----------------------------------|-------------------------------|
| Program Start Date | Program Status |
| <input type="text"/> | Qualification Conferred |
| Qualification Conferral Date | Expected Completion Date |
| <input type="text"/> | <input type="text"/> |
| Official Transcript Required? | Official Transcript Received? |
| <input type="text"/> | <input type="text"/> |
| Date Official Transcript Received | |

COURSE

No Subject Area has been added!

5. Click **Return to Dashboard**.

Note: For **Internationally Educated Professionals**, please bypass this results page and click **Return to Dashboard**.

CPA MYPORTAL PROFILE SUPPORT EVENTS

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 (IT) equivalent courses as over (90% minimum grade requirement, 10-year currency). If your IT-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]

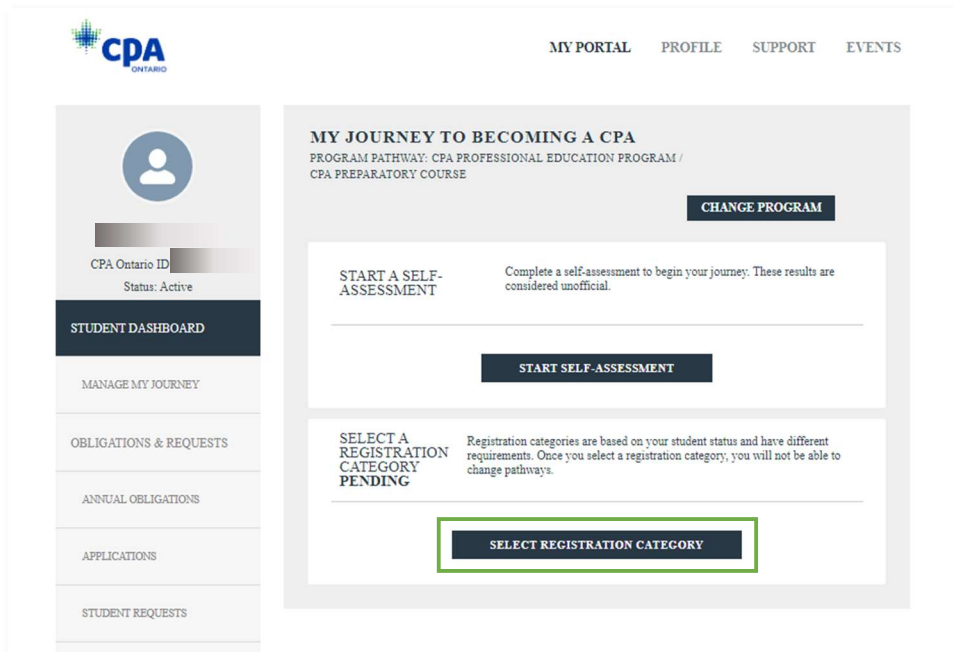
Degree Requirement:

| CPA COMPETENCY AREA | COURSE NAME | STATUS | STATUS REASON | NOTES | CURRENCY ENTRY 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 - IF1 | Required | | | |
| FINANCIAL REPORTING | CPA PFP Postgraduate - IF2 | Required | | | |
| FINANCIAL REPORTING | CPA PFP Postgraduate - AFR | Required | | | |
| FINANCE | CPA PFP Postgraduate - COF | Required | | | |
| AUDIT AND ASSURANCE | CPA PFP Postgraduate - AUA | Required | | | |
| TAXATION | CPA PFP Postgraduate - TAX | Required | | | |
| MANAGEMENT ACCOUNTING | CPA PFP Postgraduate - MAA | Required | | | |
| STRATEGY AND GOVERNANCE | CPA PFP Postgraduate - ISMA | Required | | | |
| OTHER GENERAL BUSINESS TOPICS | CPA PFP Postgraduate - BUS | Required | | | |
| OTHER GENERAL BUSINESS TOPICS | CPA PFP Postgraduate - IIE | Required | | | |
| | CPA PFP Core 1 | Required | | | |
| | CPA PFP Core 2 | Required | | | |
| | CPA PFP Elective Assurance | Required | | | |
| | CPA PFP Elective Performance Management | Required | | | |
| | CPA PFP Elective Taxation | Required | | | |
| | CPA PFP Elective Finance | Required | | | |
| | CPA PFP Capstone 1 | Required | | | |
| | CPA PFP Capstone 2 | Required | | | |
| | Custom 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](#).

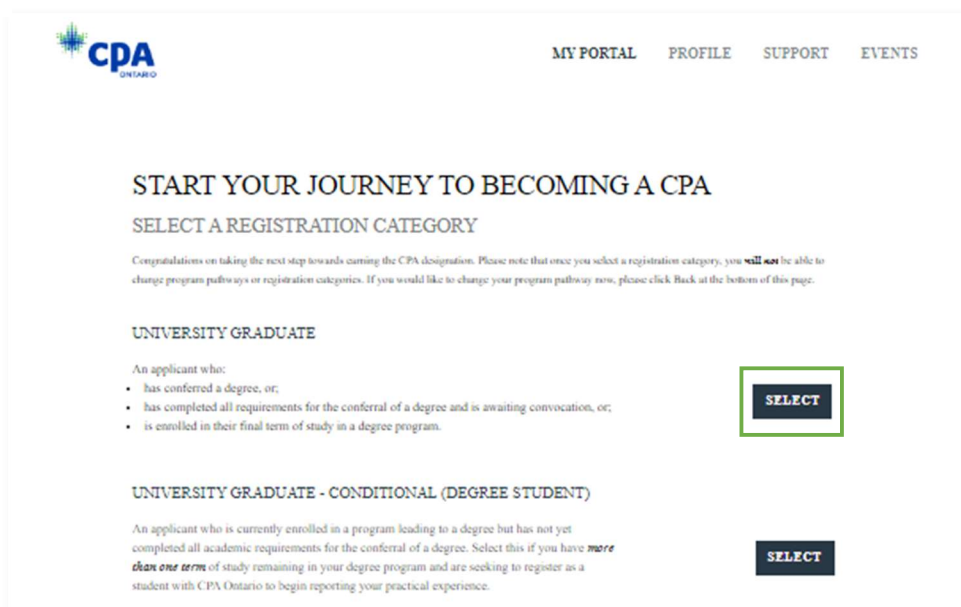
RETURN TO DASHBOARD

6. Click **Select Registration Category**.



7. Select your Registration Category.

Note: If you have a degree from a post-secondary institution **outside Canada**, 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 Transcript Assessment.



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

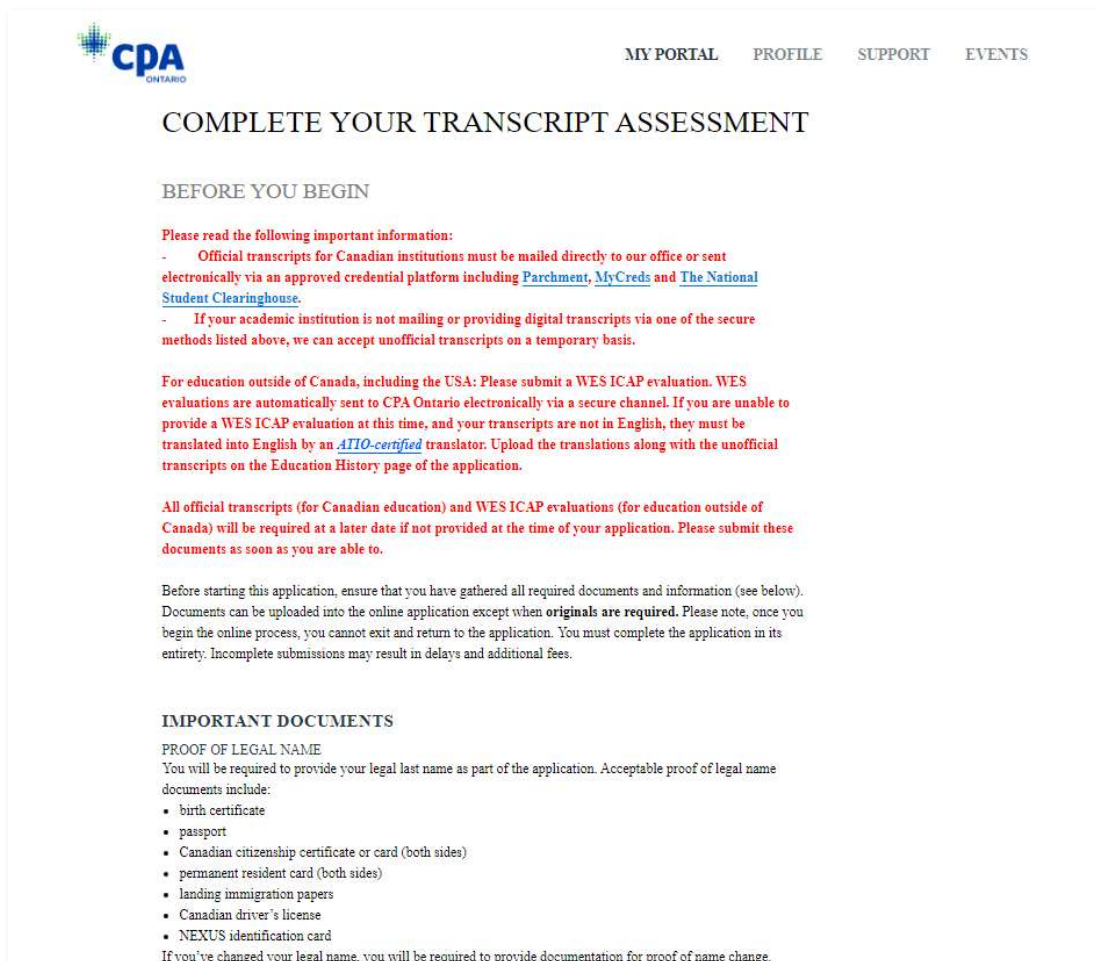
Tip: Use the navigation buttons at the bottom of each page to easily move through and save the application. Most pages include three navigation buttons: **Back, Save and Exit, and Continue.**


- **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 [ATO-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

● ○ ○ ○ ○ ○

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 [Text]  |
| 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] [Dropdown]


Residential Address Residential Country
[Canada] [Dropdown]

Residential Street
[Text] 

Residential City Residential State/Province
[Text] [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

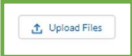
| | |
|----------------------|----------------------|
| *Preferred Phone | *Preferred Email * |
| <input type="text"/> | <input type="text"/> |
| Home Phone | Alternate Email |
| <input type="text"/> | <input type="text"/> |
| Business Phone | Mobile Phone |
| <input type="text"/> | <input type="text"/>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

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.

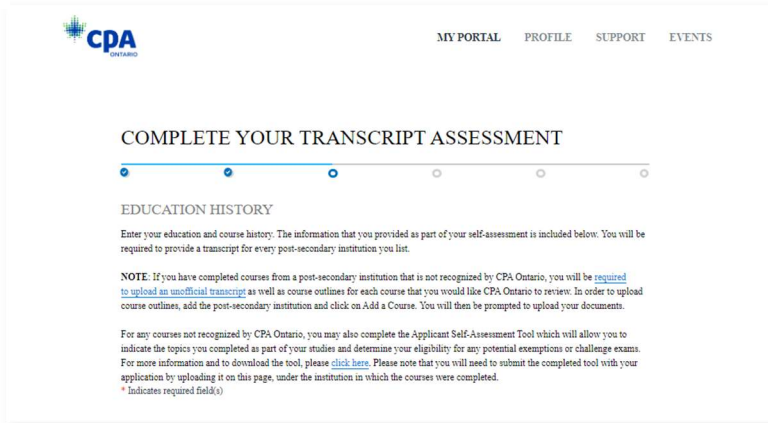
Please upload your files



Please review and address all issues before saving.

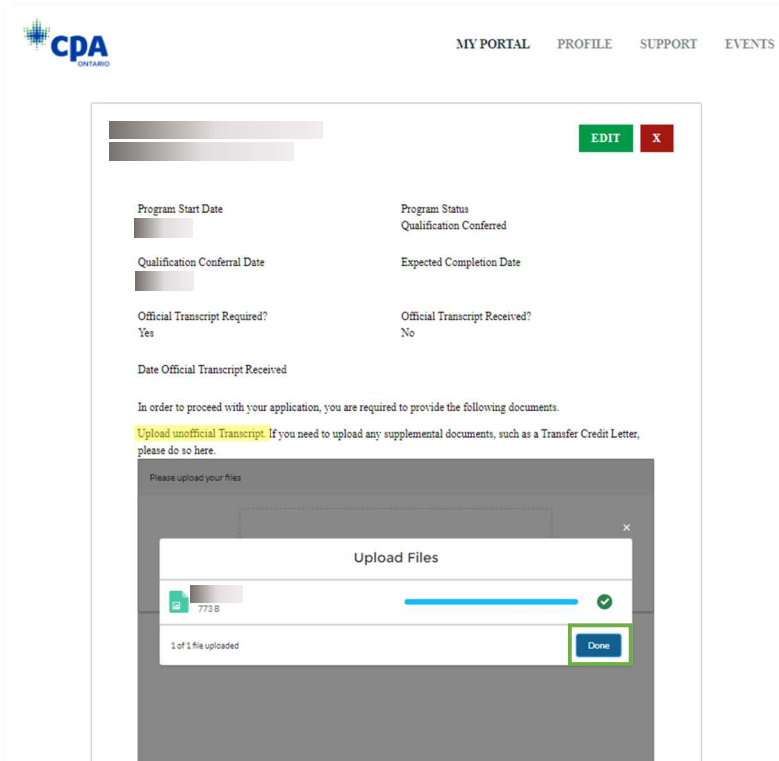
| | | |
|-------------------------------------|--|---|
| <input type="button" value="BACK"/> | <input type="button" value="SAVE AND EXIT"/> | <input type="button" value="CONTINUE"/> |
|-------------------------------------|--|---|

Note: Please carefully read the information below.



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.

Important: 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.



Note: You will need to upload course outlines/syllabus **for each course** that you would like CPA Ontario to review. In order to upload course outlines, **Click Add New Course Outline, Select a Subject Area from the drop down** and you will then be prompted to **upload your documents**. Repeat the process to select another course and to upload a course outline.


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

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

A screenshot of a web form titled "COURSE". Below the title, there is a message: "No Subject Area has been added!". Below this message, a button labeled "ADD NEW COURSE OUTLINE" is highlighted with a green rectangular border. Below the button, there is a link: "+ ADD A POST-SECONDARY INSTITUTION". At the bottom of the form, there are three buttons: "BACK", "SAVE AND EXIT", and "CONTINUE".

A screenshot of the "ADD A COURSE" modal form. The form has a title bar with "ADD A COURSE" and a close button. Below the title, there is a dropdown menu for "Subject Area" with "Financial Reporting" selected. Below the dropdown, there is a section for uploading files with the text "Please upload your files" and a button labeled "Upload Files" or "Or drop files". Below the upload section, there is a table with columns "Title" and "File Type". The table contains one row: "Course Outline" with "WORD_X" as the file type. At the bottom of the modal, there are two buttons: "CANCEL" and "SAVE". The "SAVE" button is highlighted with a green rectangular border. Below the modal, there are three buttons: "BACK", "SAVE AND EXIT", and "CONTINUE".

Note: Internationally Educated Professionals, please ignore the Self-Assessment Results and Click Continue.



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

COMPLETE YOUR TRANSCRIPT ASSESSMENT

2
3
4
5
6
7

ASSESSMENT 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 (60% 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 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 | | | |



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

| | | |
|-------------------------------|--|----------|
| STRATEGIC AND GOVERNANCE | CPA PEP Prerequisite - FMA | Required |
| OTHER GENERAL BUSINESS TOPICS | CPA PEP Prerequisite - BUL | 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

Home 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](#)
[EVENTS](#)

COURSE

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**.



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

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 |

The screenshot shows the CPA Ontario payment portal. The top navigation bar includes the CPA Ontario logo and links for 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'. The '1. Tax Address' section shows 'Residential' as the selected address type with a 'Change' link. The '2. Choose a Payment Method' section shows 'Credit Card' as the selected method, with 'Interac' as an option. Below this, there are input fields for 'Card Holder Name', 'Card Number', 'CVV', 'Exp Month', and 'Exp Year'. A 'Billing Address' section is also present with a '+ New Address' button and a radio button for 'Residential'. A green '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, broken down into 'Shopping Cart' (\$150.00) and 'Tax | GST/HST' (\$19.50). Below this is a 'SHOPPING CART' section with '1 ITEM' listed as 'CPA Transcript Assessment Fee' for \$150.00, with an 'UPDATE CART' button.

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

Your application will take six to eight weeks. 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?

For **International Transcripts**, you will need to submit course outlines for the courses you would like recognized, otherwise, you wouldn't be able to get any exemptions beyond the non-core courses.

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.

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.

I am waiting for my WES Evaluation to be sent 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) and course-by-course credential evaluation carried out by World Education Services (WES) through their International Credential Advantage Package (ICAP) (for education outside of Canada)** will be required at the time of your application.

We will only start the review process once we receive your WES Evaluation (sent directly by WES to CPAO) and your official transcripts from your University/College (if you also have a Canadian degree).

Tip: Once you receive a notification from WES that your evaluation has been sent to CPAO, submit your transcript assessment application then.

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.

For more information regarding WES ICAP requirements, please visit this [page](#).

More information or questions regarding your transcript assessment application:

transcriptregistration@cpaontario.ca