

Transcript Assessment Form

CPA Ontario ID No.

(for office use only)

The Transcript Assessment Form is to be used by individuals who have an interest in enrolling in the [CPA Certification Program](#) with the Chartered Professional Accountants of Ontario (CPA Ontario). If submitting your transcript assessment package via email, this form and all documentation must be submitted to CPA Ontario as one package in PDF format. If submitting official transcript(s), have your post-secondary institution's Registrar's Office send the official transcript(s) directly, in a sealed envelope to CPA Ontario at the address on the top right of this form (see Step 2 on page 2 for more information).

Incomplete submissions may result in delays and additional fees. **Effective August 1, 2016**, documents submitted after transcript assessment results are provided will necessitate a reassessment fee of \$150 (plus HST). Please see [Get Started Today](#).

Fee Requirement:

There is a \$150 (plus HST) fee for transcript assessments. Please see [Get Started Today](#) for more information.

Privacy Statement:

CPA Ontario is committed to respecting your privacy and protecting your personal information. The collection, use and disclosure of your personal information that may be made by CPA Ontario is described in the CPA Ontario [Privacy Policy](#). The information collected in this Transcript Assessment is used primarily for the purposes of an individual's assessment.

THIS FORM APPLIES:	THIS FORM DOES NOT APPLY:
<ul style="list-style-type: none"> ■ To determine which path you might qualify under, for enrolment in the CPA Professional Education Program (CPA PEP): <ol style="list-style-type: none"> a. Subject Area Coverage through a Post-Secondary Institution b. Legacy CA program or 51 credit hour (Transitional Path) c. Legacy CMA Accredited or Approved Path ■ To determine if you meet the academic prerequisite education requirements for enrolment in the CPA Certification Program and may be granted exemption from, or may be entitled to challenge, one or more components of the CPA Certification Program. 	<ul style="list-style-type: none"> ■ Enrolled in or have an intention to complete an Ontario CPA Accredited Program. For more information, view Ontario CPA Accredited Programs. ■ Enrolled in or have an intention to complete an approved university co-operative degree program. ■ Member with an Accounting Body outside Canada. For more information, view Internationally Trained Accountants. ■ To a Student Transfer from another Provincial Body, for more information on how to apply as a Student Transfer, view Student Transfer from another Provincial Body.

Requirements for entry into CPA Certification Program:

There are academic prerequisites for admission to the CPA Certification Program. Before entering the CPA Professional Education Program (PEP), candidates must complete a 120 credit hour degree or equivalent and cover specific subject areas. The specific subject areas may be covered during a university program, or through additional degree credit courses offered by post-secondary institutions including universities, colleges and/or academic institutions in another country or through the CPA preparatory courses.

For more information on the CPA Certification Program, please visit [CPA Certification Program homepage](#).

Important Update:

Effective August 1, 2016, the CPA Prerequisite Education Program (CPA PREP) has been renamed to preparatory courses. The entry requirement for preparatory courses is 30 credit hours of post-secondary study (equivalent to one year full-time study) at a post-secondary institution or three years of relevant work experience. A 120 credit hour degree or equivalent is required for admission into the CPA Professional Education Program (CPA PEP). Mature students, may or may not hold a degree.

For more information on the CPA Ontario academic Prerequisites, please visit [CPA Program academic Prerequisites homepage](#).

To Submit Your Transcript Assessment Request

Step 1: Complete a Self-Assessment and Plan Your Journey

Review the academic prerequisites and perform a self assessment using the [Self Assessment Tool](#) (if educated in Ontario), the [CPA Path Decision Tree](#) and/or the CPA-approved [course grids](#).

Step 2: Submit Your Completed Transcript Assessment Package

It is very important that your transcript assessment package is **complete** before it is submitted to avoid delays and additional fees. **Please review the requirements at [Get Started Today](#).**

- a. Complete this form.
- b. Request your [official transcript\(s\)](#) from all the post-secondary institutions (PSIs) you attended. Include your transcript order confirmation(s) in your package. In order for your transcripts to be considered as official, the PSI's Registrar's Office must send the official transcript(s) directly, in a sealed envelope, to CPA Ontario, 69 Bloor Street East, Toronto Ontario, M4W 1B3.
- c. Prepare all documentation to be included in your transcript assessment package, including:
 - Completed Transcript Assessment Form,
 - [Proof of legal name \(effective August 1, 2016\)](#),
 - Transcript order confirmation(s) for your official transcript(s) and
 - [Supplementary documentation](#) (if applicable).

For more information, see [Get Started Today](#).

- d. Email, excluding official transcript(s), to transcripts@gocpaontario.ca all documentation in PDF format only. Alternatively, you may fax documentation to 416 962.8900 or mail the complete package to CPA Ontario, 69 Bloor Street East, Toronto Ontario, M4W 1B3, to the attention of the Assessment and Registration Team. CPA Ontario will not accept documents in Word, JPEG and Excel formats.

Step 3: Pay the Transcript Assessment Fee

The transcript assessment fee is \$150 (plus HST). CPA Ontario will send you an email containing a link to the payment page within 5 business days of receiving your complete package, including all official transcripts and official supplementary documentation, as applicable. To ensure a timely result, please pay the fee promptly as your assessment will only begin once payment and all required documentation has been received. If payment is not received within 30 days of the email, the assessment will be cancelled. Please note that incomplete transcript assessment submissions may result in delays and additional fees. **Effective August 1, 2016**, documents submitted after transcript assessment results are provided will necessitate a Reassessment fee of \$150 (plus HST).

Transcripts from Canadian Institutions:

It takes **4-6** weeks to process a transcript assessment package once we have received payment and all required documentation.

Transcripts from Outside of Canada:

It takes **6-8** weeks to process a transcript assessment package once we have received payment and all required documentation.

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A. Personal Information

Please note that the name provided below will be used by CPA Ontario in its record as your registered name.

Title (select **ONE**): Ms. Mr. Other (please specify):

Surname*: Middle*: First*:

Preferred First Name (if different from above):

Former Legal Name**

Surname: Middle: First:

Date of Birth (mm/dd/yyyy): / /

Mailing Address: City:

Province: Territory, State: Postal or Zip Code:

Preferred Tel: Email:

* Satisfactory evidence of legal name includes a copy of any one of the following: birth certificate (or equivalent), passport, both sides of a Canadian citizenship certificate or card, both sides of a Permanent Resident card, or landed immigration papers.

** If the name under which you have used to apply and/or under which your degree(s) or transcript(s) was granted is different from that which appears on the document submitted as proof of legal name, a copy of the document supporting the change of legal name, endorsed with “this is a certified true copy” signed and dated, is required.

Note: the information provided here will be considered your preferred contact information. You are responsible for ensuring the contact information on record with CPA Ontario is current and accurate. Please do so by visiting [update profile](#).

By entering my electronic contact information above and signing below, I consent to the collection, use and disclosure of the personal information provided as described in the CPA Ontario Privacy Policy, and I agree that CPA Ontario may contact me at the electronic contact information provided about its products and services or for other promotional purposes. Furthermore, I confirm that I own and/or am authorized to use the electronic contact information I have provided. I acknowledge that I may withdraw my consent at any time by contacting CPA Ontario at CASL@cpaontario.ca or by mail at CPA Ontario - Marketing & Communications, 69 Bloor Street East, Toronto, ON M4W 1B3.

Yes No

B. Basis of Application

Please select one of the following paths under which you will be assessed to determine whether you meet the academic requirements for enrolment:

[CPA Path](#) (Subject area coverage through preparatory courses or a post-secondary institution)

[Transitional Path](#) (51 credit hour courses)

[Legacy CMA Accredited/Approved Path](#)

C. Self-Declaration (Mandatory)

Please select **ONE** option below that reflects your current status:

Conferred Degree:

- A. I have conferred either a 90 or 120 credit hour degree or equivalent. I understand that a 120 credit hour degree or equivalent is required for admission into the CPA Professional Education Program (CPA PEP). (**Documentation MUST be sent directly to CPA Ontario from the Registrar's Office at the post-secondary institution. Please indicate below in Section D.**)

Degree not yet conferred:

- B. I have completed my degree requirements, but have not yet conferred my degree. I have included an [unofficial transcript\(s\)](#) and a Letter of Good Standing showing my future degree conferral date for assessment. (**Please indicate below in Section D.**)
- C. I am enrolled in my final semester at a post-secondary institution. I have included an [unofficial transcript\(s\)](#) for assessment. (**Please indicate below in Section D.**)
- D. I am a first, second or third year student enrolled in a post-secondary institution. I have included an [unofficial transcript\(s\)](#) for assessment. I wish to receive course advice to complete my prerequisites through a post-secondary institution. (**Please indicate below in Section D.**)

30 credit hours or 3 years relevant work experience:

- E. I have completed at least 30 credit hours through a post-secondary institution (equivalent to one year of full-time study) and I wish to be assessed for **preparatory** courses (formerly CPA PREP). I understand that a 120 credit hour degree or equivalent is required for admission into the CPA Professional Education Program (CPA PEP). (**Documentation MUST be sent directly to CPA Ontario from the Registrar's Office at the post-secondary institution. Please indicate below in Section D.**)
- F. I have completed three years relevant work experience and I have included a résumé for assessment. I wish to be assessed for CPA **preparatory** courses (formerly CPA PREP). I understand that a 120 credit hour degree or equivalent is required for admission into the CPA Professional Education Program (CPA PEP).

Mature Category:

- G. I may or may not hold a degree and I wish to be assessed under the Conditional [Mature Category](#). I have at least 3 years relevant work experience and have included a résumé for assessment.
- H. I may or may not hold a degree and I wish to be assessed under the [Mature Category](#). I have at least 8 years relevant work experience and have included a résumé for assessment.
- I. I may or may not hold a degree and I wish to be assessed under the [Mature Category](#). I have at least 3 or more years of relevant work experience and have included a résumé and transcript from a post-secondary institution for assessment (**Documentation MUST be sent directly to CPA Ontario from the Registrar's Office at the post-secondary institution. Please indicate below in Section D.**)
- J. I may or may not hold a degree and I wish to be assessed under the [Mature Category](#). I have at least 8 or more years of relevant work experience and have included a résumé and transcript from a post-secondary institution for assessment. (**Documentation MUST be sent directly to CPA Ontario from the Registrar's Office at the post-secondary institution. Please indicate below in Section D.**)

D. Transcript(s) Submission:

I have conferred a degree and requested the following [official documents](#) be sent to CPA Ontario for assessment (please select **ONE**):

[Official post-secondary institution transcript\(s\)](#)

[WES \(World Education Services\) ICAP \(International Credential Advantage Package\) course-by-course credential evaluation](#)

OR

I have not conferred a degree and have included an unofficial transcript(s) with this submission.

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E. Declaration

I declare that the above information and all other information given on this form is true and complete.

Print Full Name of Applicant

X _____

Signature

/ /

Date (mm/dd/yyyy)

Questions

For questions relating to the Transcript Assessment Form, please contact the CPA Ontario Assessment and Registration Team at customerservice@cpaontario.ca or call our customer service team at 1 800 387.0735.