



CPA

CHARTERED
PROFESSIONAL
ACCOUNTANTS

WESTERN
SCHOOL
OF BUSINESS

CPA WESTERN SCHOOL OF BUSINESS (CPAWSB) EMPLOYER PORTAL USER GUIDE

May 2022

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Welcome to the CPAWSB Employer Portal

This guide will provide you with a walkthrough of the basic Employer Portal functions. If further assistance or clarification is required, please contact partnerships@cpawsb.ca.

CPAWSB Employer Portal

The CPAWSB Employer Portal is a self-service portal where employers can:

- Review the CPA academic results for learners in their organization (Note: only learners who have granted consent for their information to be shared with their employer will be visible in the Employer Portal)
- Review all active CPA learners who are currently enrolled in CPA Preparatory courses or the CPA Professional Education Program (CPA PEP)
- Review any outstanding accounts receivable items for CPA learners connected to an employer/organization

Employers who are interested in accessing the Employer Portal must fill out an application that can be found on the [CPAWSB website](#).

Employer Portal Access

Once your Employer Portal profile has been set up through CPAWSB, you will receive an automatically generated email providing you with your username and a link to activate your account and set your personal password. Once your profile has been activated, the portal can be accessed at any time by going to the [Employer Portal Login page](#). The Employer Portal is optimized for Chromium Edge. The Employer Portal does not currently support mobile browsers or mobile operating systems.

Login using the username/email that has been assigned to you (indicated in the activation email) and the password that you have set up through the link in the activation email.



Login

EMAIL

PASSWORD

Remember me

[LOG IN](#)

[Forgot your password?](#)

Employer Portal

Welcome to the Employer Portal.

Each organization may have up to a maximum of three (3) **administrators** and an unlimited number of **users** assigned with access to the CPAWSB Employer Portal. Administrators are responsible for the set up and management of the organization’s administrator and user profiles.

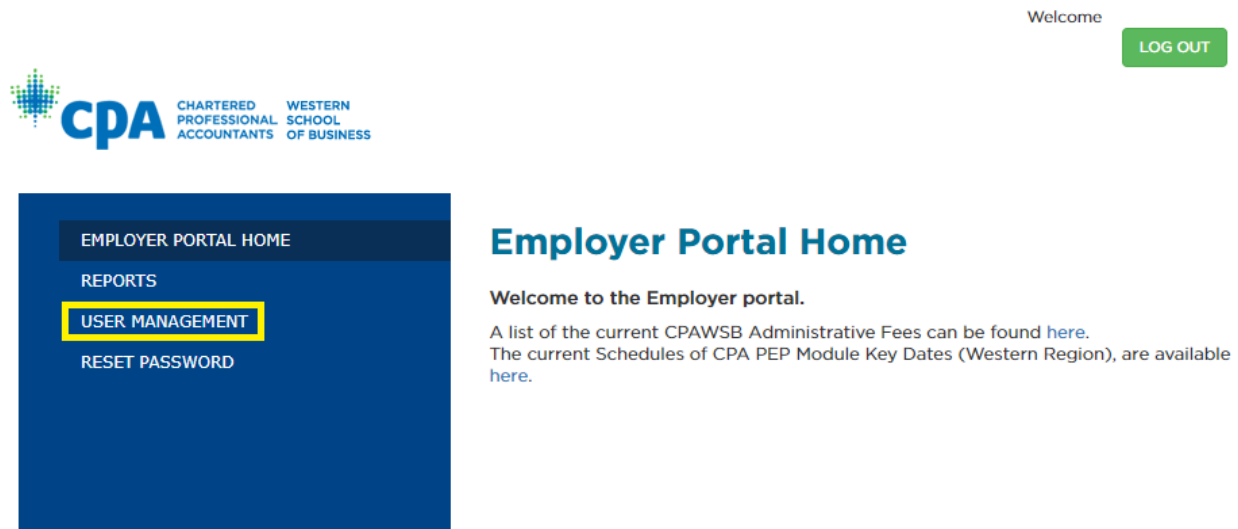
Employer Portal Administrators

A maximum of three (3) administrators may be granted access to the Employer Portal for any organization. Administrators can access the reports and candidate information for all companies/locations within an organization. Administrators are also responsible for adding, editing, and removing any additional user profiles within their organizations. This includes limiting each user’s access to run reports for only the applicable companies/locations.

Employer Portal Users

User profiles are added and managed by the organization’s administrator(s). A user profile can run available reports, but only has access to the information for the specific companies/locations assigned by the administrator.

User profiles can be added, edited, or removed by the administrator through the User Management section of the Employer Portal.



On the User Management page, select Add New User.



Welcome [LOG OUT](#)

Welcome to User Management. Here, Administrators can add, edit or delete Administrator and User profiles. Organizations can assign up to three Administrators and unlimited Users. Administrators can add, edit, or delete Users within their organization as needed and can access and download reports for all office locations within an organization. Users can only access and download reports for office locations assigned by the Administrator.

Name	Admin/User Status		
	Admin		
	User	Edit	Delete
	User	Edit	Delete

[ADD NEW USER](#)

[RETURN](#)

Enter the required profile information, indicated by the red asterisk (*). If the profile you are setting up is one of the three (3) Administrators permitted for the organization, ensure that the “Administrator Privileges” box is checked. If you are setting up a User profile, leave this box unchecked.

Welcome [LOG OUT](#)

Add a new Employer Portal User

Email: *

First Name: *

Last Name: *

Administrator Privileges: [i](#)

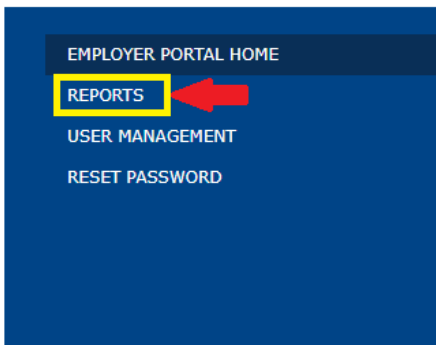
Company	CPA Module Registrations	Active CPA Learners	Outstanding AR Listing
All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

All available companies/locations within the organization will be listed. For a new administrator profile, check the box at the top of the column for each report type (CPA Module Registrations, Active CPA Learners, and Outstanding AR Listing) to select reports for all companies/locations. For new user profiles, check the box for each report next to each specific location listed to limit the access to only the specified locations.

Once an administrator or user profile has been set up, the details (including contact information and administrative privileges) can be edited, or the entire profile deleted, from the User Management page.

Employer Portal Reports

Once logged in, administrators and users can access the reports that are available through the “Reports” link in the menu on the Employer Portal home page.



Employer Portal Home

Welcome to the Employer portal.

A list of the current CPAWSB Administrative Fees can be found [here](#).
The current Schedules of CPA PEP Module Key Dates (Western Region), are available [here](#).

There are three reports available through the Employer Portal: **CPA Module Registrations**, **Active CPA Learners**, and **Outstanding AR Listing**. A list of acronyms/abbreviations used in the reports can be found in [Appendix A](#).

CPA Module Registrations

This report displays module and examination **registrations** and **results** for candidates in the CPA Professional Education Program (CPA PEP) and students registered in CPA preparatory courses.

To view this report, click the “Run Report” link next to **CPA Module Registrations**:

Welcome to Employer Reports. Here you can run reports to see the status and progress of your CPA candidates through the CPA Professional Education Program (CPA PEP).

Report	Summary	
CPA Module Registrations	Displays semesters of CPA Preparatory courses, CPA PEP module sessions, exam registration dates, and results for learners.	Run Report
Active CPA Learners	Displays all active CPA learners (i.e., students and candidates) who are currently enrolled in CPA Preparatory courses or CPA PEP as of today's date.	Run Report
Outstanding AR Listing	Displays all outstanding accounts receivable items and amounts for CPA learners connected to an employer/organization, as of today's date.	Run Report

RETURN

Next:

The screenshot shows the top navigation bar with the CPA logo (Chartered Professional Accountants of Western School of Business) on the left and a 'Welcome' message with a 'LOG OUT' button on the right. Below this is a search filter section with four numbered callouts: 1 points to the 'Companies' dropdown menu, 2 points to the 'Session' dropdown menu (currently showing '<Select a Value>'), 3 points to the 'Module' dropdown menu, and 4 points to the 'View Report' button.

1. Select the company/location from the drop-down menu.
2. Select the required session from the drop-down menu (Note: Future sessions in the current academic year are also visible. Results would not be available until the scheduled marks release)
3. Select the desired module from the drop-down menu.
4. Click "View Report".

A preview of the report details will be displayed in your internet browser window and can be exported to your preferred format by clicking on the "Save" icon above the report results and choosing one of the options from the drop-down menu:

The screenshot shows the report preview interface. It includes the same search filters as the previous image. Below the filters is a navigation bar with a search box containing '1 of 1' and a 'Find | Next' button. A yellow box highlights the 'Save' icon (a document with a download arrow) in the navigation bar.

The following information is provided:

- CPA ID Number
- Candidate Name
- Exam Offering
- Exam Registration Date
- Module Offering
- Module Registration Date
- Exam Attempt
- Exam Status (Pass or Fail results) *
- Registration Type
- Workshop Location
- Exam Location
- Business Email
- Employer Number
- Employer
- Employer Address
- Business City
- Experience Route
- Experience Path
- Audit Area
- Practice Certificate
- Program Name
- Amount Outstanding
- Invoice Date

Module and CFE Results

Module and CFE results are released according to the [CPA PEP schedules](#).

Note: The report shows only a summary of final results. Candidates who pass only one component of the CFE (e.g., either Day 1 or Day 2/3, but not both) will be listed as an overall “Fail” on this report until both components have been successfully completed.

To access module and CFE results, please follow the instructions below:

1. Login using the username/email assigned to you from your activation email.
2. Run the **CPA Module Registrations** report with the following parameters:

Modules: PEP regular or extended session, for example:

Companies	<input type="text"/>	Session :	<input type="text" value="PEP 2021/2022 Spring: April - July 2021"/>	<input type="button" value="View Report"/>
Module :	<input type="text" value="AS"/>			

1 of 1 Find | Next

Companies	<input type="text"/>	Session :	<input type="text" value="PEP 2021/2022 Extended: Jul/21-Dec/21"/>	<input type="button" value="View Report"/>
Module :	<input type="text" value="AS"/>			

May CFE: PEP May (Summer) Session (July – Sep), for example:

Companies	<input type="text"/>	Session :	<input type="text" value="PEP 2021/2022 Summer: July - Sep 2021"/>	<input type="button" value="View Report"/>
Module :	<input type="text" value="CFE"/>			

September CFE: PEP September (Fall) Session (Sep – Dec), for example:

Companies	<input type="text" value="KPMG LLP (External Audit), Regina"/>	Session :	<input type="text" value="PEP 2021/2022 Fall: Sep - Dec 2021"/>	<input type="button" value="View Report"/>
Module :	<input type="text" value="CFE"/>			

If you cannot find a learner’s results, please confirm with the learner that they have updated the following information in their My CPA Portal profile:

1. [Current employment information](#) that matches your employer profile. Please check for spelling (and route if applicable)
2. Consent to disclose their results with their employer in their My CPA Portal profile
 - I consent to CPAWSB disclosing my personal information to the employer listed in my CPA profile.
 - I do **not** consent to CPAWSB disclosing my personal information to the employer listed in my CPA profile.

Active CPA Learners

This report displays all active CPA learners (i.e., students and candidates) who are currently enrolled in CPA Preparatory courses or CPA PEP from each organization as of today's date. Please note that this report only displays active learners, it does *not* include learners who have withdrawn from a program, have gone to membership, etc.

The following information is provided:

- CPA Number
- First Name
- Last Name
- Candidate's Business Email
- Employer Name
- Employer Number
- Business City
- Business Province
- Employment Start Date
- Experience Path
- Program Name
- Number of CPA PEP Modules Passed
- Revised Graduation Deadline

To view the report results, click the link to "Run Report" next to the **Active CPA Learners** report.

Welcome to Employer Reports. Here you can run reports to see the status and progress of your CPA candidates through the CPA Professional Education Program (CPA PEP).

Report	Summary	
CPA Module Registrations	Displays semesters of CPA Preparatory courses, CPA PEP module sessions, exam registration dates, and results for learners.	Run Report
Active CPA Learners	Displays all active CPA learners (i.e., students and candidates) who are currently enrolled in CPA Preparatory courses or CPA PEP as of today's date.	Run Report
Outstanding AR Listing	Displays all outstanding accounts receivable items and amounts for CPA learners connected to an employer/organization, as of today's date.	Run Report

[RETURN](#)

To run the **Active CPA Learners** report:

1. Choose the company/location from the drop-down menu.
2. Choose the province(s) you would like to view in the business: Province drop-down menu
3. Click "View Report"

The results of the report will be displayed in the internet browser window and can be exported to your preferred format by clicking on the "Save" icon above the report results and choosing one of the options from the drop-down menu:



Outstanding AR Listing

This report displays all outstanding accounts receivable (AR) items and amounts for CPA learners from each organization as of today's date.

Please note that the Employer column is based on the data entered by the student/candidate in My CPA Portal. Learners are responsible for keeping this information up to date. It is recommended that the employer compare the individuals listed on this report to their own internal records.

The following information is provided:

- CPA Number
- CPA Relationship
- Learner's Name
- Employer Name
- Employer Number
- Business City
- Business Province
- Invoice Date
- Invoice Type
- Invoice Number
- Invoice Description
- Amount
- Outstanding Amount

To view the report results, click the "Companies" dropdown to choose the company/location then "Run Report" next to the **Outstanding AR Listing** report.

Welcome to Employer Reports. Here you can run reports to see the status and progress of your CPA candidates through the CPA Professional Education Program (CPA PEP).

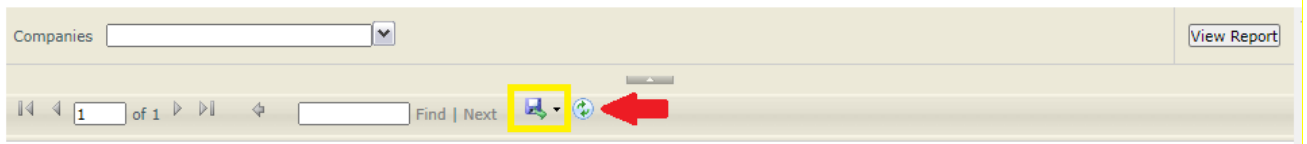
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Outstanding AR Listing	Displays all outstanding accounts receivable items and amounts for CPA learners connected to an employer/organization, as of today's date.	Run Report

To run the **Outstanding AR Listing** report:

1. Choose the company/location from the drop-down menu.
2. Click "View Report"

Companies
View Report

The results of the report will be displayed in the internet browser window and can be exported to your preferred format by clicking on the "Save" icon above the report results and choosing one of the options from the drop-down menu:



Questions/Feedback

If you have any questions or concerns relating to the user interface of the Employer Portal, please do not hesitate to contact partnerships@cpawsb.ca.

Thank you for using the CPAWSB Employer Portal.

Appendix A: Employer Portal Reports Acronyms/Abbreviations

The following acronyms are used in the reports provided through the CPAWSB Employer Portal:

Acronym	Meaning
C1	Core 1 Module
C1NFC	Core 1 Module Not for Credit
C2	Core 2 Module
C2NFC	Core 2 Module Not for Credit
AS	Assurance Elective Module
ASUNFC	Assurance Elective Module Not for Credit
TX	Tax Elective Module
TXNNFC	Tax Elective Module Not for Credit
PF	Performance Management Elective Module
PERNFC	Performance Management Elective Module Not for Credit
FN	Finance Elective Module
FINNFC	Finance Elective Module Not for Credit
PDPA-Tax	Post Designation Public Accounting Tax Module
CP1	Capstone 1
CP2	Capstone 2
CP2NFC	Capstone 2 Not for Credit
CFE	Common Final Exam
TA	Transcript Assessment
Exam Transcript Mark: NC	Not competent
Exam Transcript Mark: RC	Reaching competent
Exam Transcript Mark: C	Competent
Exam Transcript Mark: CD	Competent with distinction
Exam Result: F	Fail
Exam Result: MP	Marginal Pass
Exam Result: P	Pass
Exam Result: PD	Pass with Distinction
Exam Status: DNW	Candidate did not attend the scheduled exam
Exam Status: DNQ	Candidate did not qualify to write the exam based on module performance
Exam Status: DEF	Deferral of exam
Exam Status: FAIL	Failed exam
Exam Status: QTR	Qualified to write the exam
Exam Status: New	Exam registration for a related module which is not yet QTR
Exam Status: PASS	Passed exam
Exam Status: W	Withdrawal (before withdrawal deadline)
Exam Status: WL	Withdrawal (after withdrawal deadline)
Registration Type: REG	Regular enrolment
Registration Type: RWT	Re-write exam
Registration Type: DEF-RWT	Deferred re-write exam
Registration Type: CH	Challenge exam registration
Registration Type: DEF-CH	Deferred challenge exam

Registration Type: DEF-DEF	Deferred an already deferred exam registration
Invoice Type-INV	Invoice
Invoice Type-RTN	Refund