



## Instructions for Completing Annual CPD Audit on My Portal


1. Log in to [My Portal](#) with your CPA Ontario ID and password. Please use Google Chrome to access the portal.



**Sign in to your account.**

CPA Ontario ID

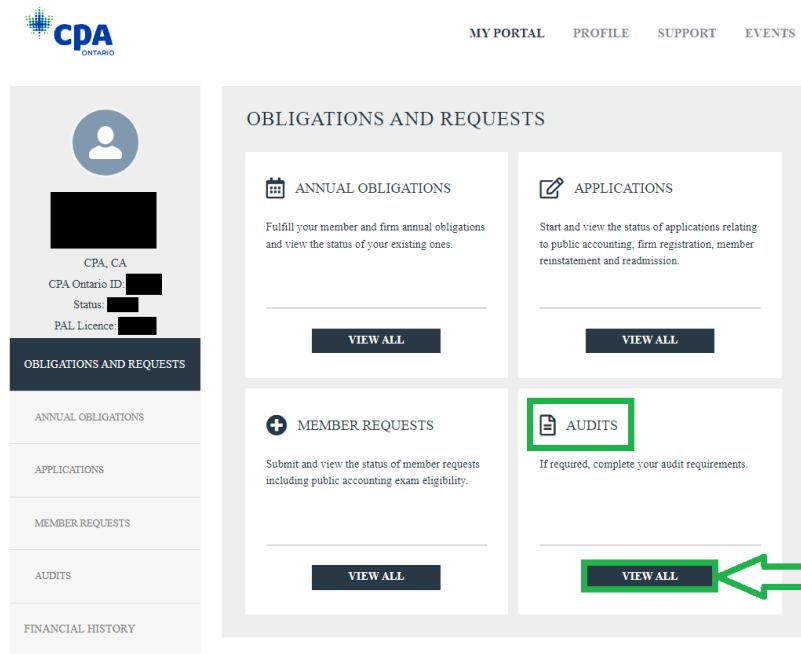
Password

I'm not a robot  reCAPTCHA  
Privacy - Terms

[Forgot ID](#) [Forgot password](#)

**SIGN IN**

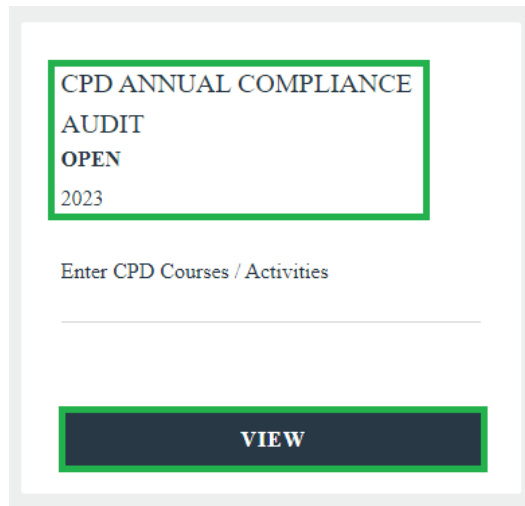
2. Select Obligations and Requests and click **VIEW ALL** under **AUDITS**.



The screenshot displays the CPA Ontario My Portal interface. At the top left is the CPA Ontario logo. To the right are navigation links: MY PORTAL, PROFILE, SUPPORT, and EVENTS. On the left side, there is a user profile card with a placeholder for a photo, followed by the text: CPA, CA; CPA Ontario ID: [redacted]; Status: [redacted]; and PAL Licence: [redacted]. Below this is a vertical menu with the following items: OBLIGATIONS AND REQUESTS (highlighted in dark blue), ANNUAL OBLIGATIONS, APPLICATIONS, MEMBER REQUESTS, AUDITS, and FINANCIAL HISTORY. The main content area is titled 'OBLIGATIONS AND REQUESTS' and contains four cards: 1. 'ANNUAL OBLIGATIONS' with a calendar icon, description 'Fulfill your member and firm annual obligations and view the status of your existing ones.', and a 'VIEW ALL' button. 2. 'APPLICATIONS' with a document icon, description 'Start and view the status of applications relating to public accounting, firm registration, member reinstatement and readmission.', and a 'VIEW ALL' button. 3. 'MEMBER REQUESTS' with a plus icon, description 'Submit and view the status of member requests including public accounting exam eligibility.', and a 'VIEW ALL' button. 4. 'AUDITS' with a document icon, description 'If required, complete your audit requirements.', and a 'VIEW ALL' button. A green box highlights the 'AUDITS' card title, and a green arrow points to the 'VIEW ALL' button in this card.



3. Click **VIEW** on the **CPD ANNUAL COMPLIANCE AUDIT (2023)** tile.

A screenshot of a web interface element, likely a tile, for a CPD Annual Compliance Audit. The tile has a light gray border and contains the following text: "CPD ANNUAL COMPLIANCE AUDIT OPEN 2023". Below this text is a text input field with the placeholder "Enter CPD Courses / Activities" and a horizontal line. At the bottom of the tile is a dark blue button with the word "VIEW" in white, bold, uppercase letters. The text and button are highlighted with a green border in the image.



4. Review the instructions and attestation, check the attestation box and click **NEXT** to proceed.


## CPD AUDIT INSTRUCTIONS

### CPD AUDIT

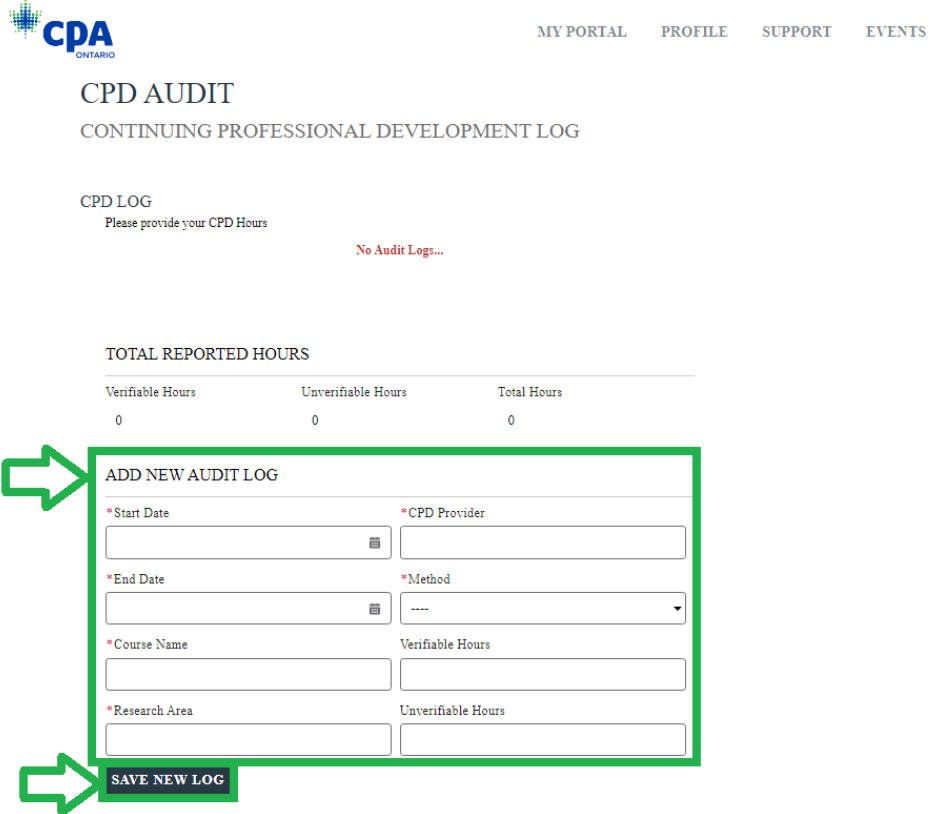
#### Applicability

Pursuant to the Continuing Professional Development Regulation, each year CPA Ontario audits a sample of Continuing Professional Development (CPD) declarations received. You have been selected for an audit of your CPD hours.

To successfully complete the audit you are required to submit your CPD Log and Audit Declaration reflecting your professional development learning activities for the audit period 2023.

  I understand that CPA Ontario may request additional information to support my CPD Audit Declaration and I have maintained records that will be made available upon request. I declare that the information provided is true and complete. I understand that it is a breach of the CPA Code of Professional Conduct to provide CPA Ontario with false or misleading information

5. Save each course individually as a new audit log by clicking **SAVE NEW LOG** after each entry.



CPA ONTARIO

MY PORTAL PROFILE SUPPORT EVENTS

### CPD AUDIT

CONTINUING PROFESSIONAL DEVELOPMENT LOG

CPD LOG

Please provide your CPD Hours

No Audit Logs...

TOTAL REPORTED HOURS		
Verifiable Hours	Unverifiable Hours	Total Hours
0	0	0

**ADD NEW AUDIT LOG**

\*Start Date

\*CPD Provider

\*End Date

\*Method

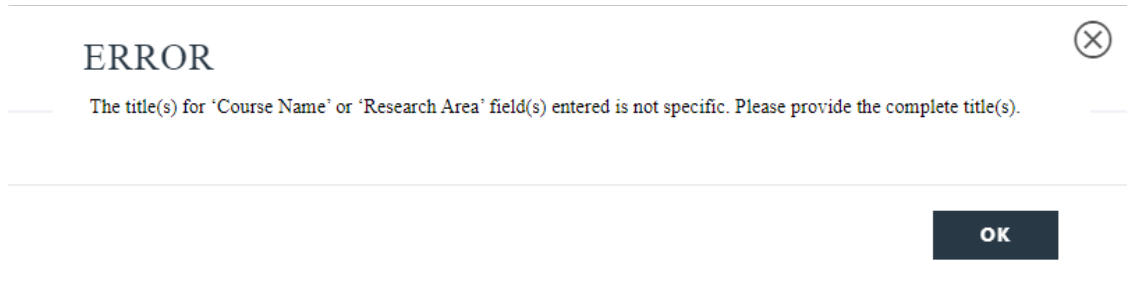
\*Course Name  Verifiable Hours

\*Research Area  Unverifiable Hours

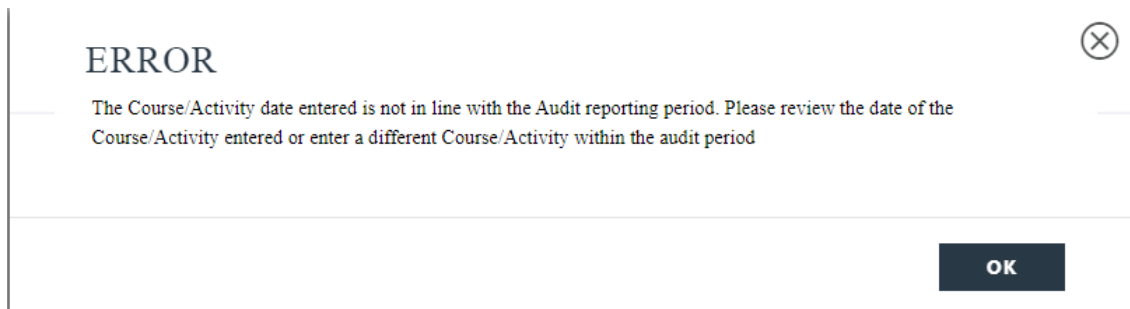
**SAVE NEW LOG**

Note:

- To enter a new CPD course, click **SAVE NEW LOG** and a new blank audit log will appear for you to fill in
- If all necessary information is not submitted, you will receive an error message. Please ensure you are prepared to provide all necessary information to complete the audit.



- Ensure the dates selected are for the correct year or you will receive an error message





- The below dropdown menu will appear under “Method”. All items surrounded in green on the below list are “verifiable methods”, and all not in green are “unverifiable methods”.

- Course/Conference/Seminars/Presentation
- Casual reading of professional journals/magazines not part of research
- Formal study leading to a degree/diploma
- Informal self-study of course materials/electronic media/device
- On-the-job training for new software/systems/procedures/techniques/application
- Pre-professional re-examination/formal testing
- Publication of professional articles/papers/academic work
- Research/Projects resulting in presentations/report/documentation
- Research/reading professional literature or journals for specific application in professional role
- Self-study leading to examination/designation
- Speaker in conference/briefing session/discussion group
- Teaching a course/PD session in an area relevant to professional role
- Participation & Work on technical committees
- Employer-Based In-House Training Session
- Writing of technical articles/papers/books
- Other



6. Once a course has been entered and you have clicked **SAVE NEW LOG** you will still be able to edit the information for each individual course by clicking **EDIT**.





MY PORTAL   PROFILE   SUPPORT   EVENTS

## CPD AUDIT

### CONTINUING PROFESSIONAL DEVELOPMENT LOG

#### CPD LOG

Please provide your CPD Hours

Activity	Start Date	
Corporate Tax - Review of Tax Planning	5-Jul-2022	 <a href="#">EDIT</a> <a href="#">X</a>
CPD Provider	End Date	
CPA Ontario	8-Jul-2022	
Research Area	Verifiable Hours	
Taxation	10	
	Unverifiable Hours	
	0	
Sum	10	





## Acceptable Entry

### ADD NEW AUDIT LOG

* Start Date	* CPD Provider
7-Aug-2023	CPA Ontario
* End Date	* Method
7-Aug-2023	Course/Conference/Seminars/Presentation
* Course Name	Verifiable Hours
ASPE: Disclosure and Presentation	7
* Research Area	Unverifiable Hours
External Audit	
<b>SAVE NEW LOG</b>	

## Invalid Entry

### ADD NEW AUDIT LOG

* Start Date	* CPD Provider
6-Jun-2023	Various
* End Date	* Method
6-Jun-2023	Course/Conference/Seminars/Presentation
* Course Name	Verifiable Hours
Various	20
* Research Area	Unverifiable Hours
Taxation, Finance, Ethics	
<b>SAVE NEW LOG</b>	

- Once you have finished entering all of your CPD hours, review the declaration section, check the **DECLARATION** box and click **SUBMIT**.

**DECLARATION**

Pursuant to the Continuing Professional Development Regulation, each year CPA Ontario audits a sample of Continuing Professional Development (CPD) declarations received. You have been selected for an audit of your CPD hours. To successfully complete the audit you are required to submit your CPD Log and Audit Declaration reflecting your professional development learning activities for the specified audit period.

I comply with the Annual CPD Audit requirement. As outlined in the CPA Ontario Continuing Professional Development regulation.

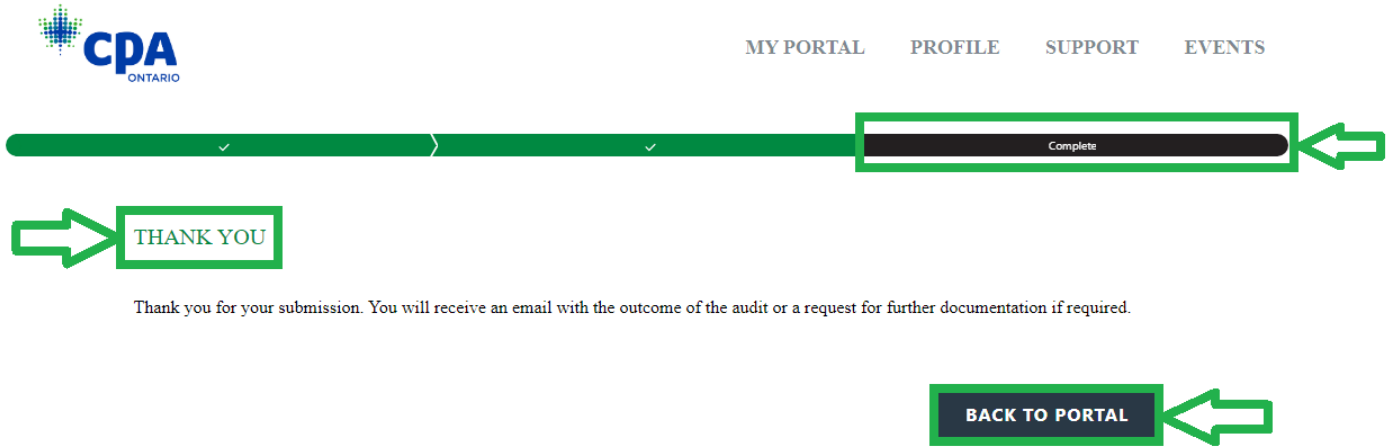
I do not comply with Annual CPD Audit requirement. I understand that filing a false CPD Declaration is contrary to the CPA Code of Professional Conduct and I will be contacted by CPA Ontario.

**CANCEL** **BACK** **SUBMIT**

**IMPORTANT NOTE:** After selecting **SUBMIT**, you will not be able to make changes so please carefully review before submitting.



8. After clicking **SUBMIT** you will see a confirmation screen.





9. You can click on **BACK TO PORTAL** to return to the Obligations and Requests page. Click on **VIEW ALL** to see that your status has now been updated to Submitted.

CPA ONTARIO

MY PORTAL PROFILE SUPPORT EVENTS

**OBLIGATIONS AND REQUESTS**

**ANNUAL OBLIGATIONS**  
Fulfill your member and firm annual obligations and view the status of your existing ones.  
[VIEW ALL](#)

**APPLICATIONS**  
Start and view the status of applications relating to public accounting, firm registration, member reinstatement and readmission.  
[VIEW ALL](#)

**MEMBER REQUESTS**  
Submit and view the status of member requests including public accounting exam eligibility.  
[VIEW ALL](#)

**AUDITS**  
If required, complete your audit requirements.  
[VIEW ALL](#)

**CPD ANNUAL COMPLIANCE AUDIT**  
**SUBMITTED**  
2023  
Enter CPD Courses / Activities  
[VIEW](#)