PROGRAM USER GUIDE FOR

CPA ONLINE SELF-STUDY APPLICATIONS

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CANADIAN
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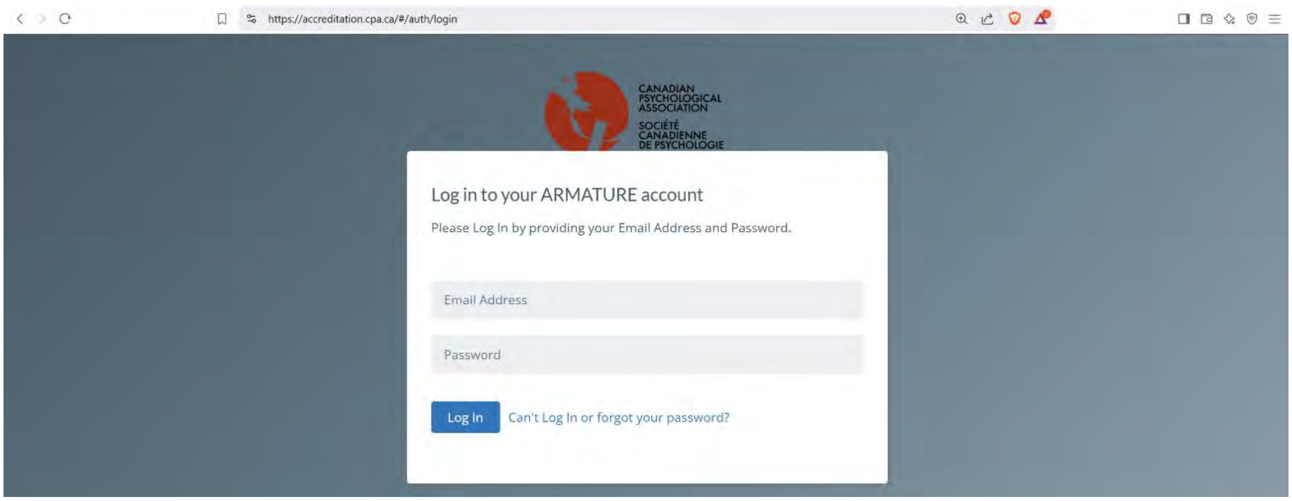
Logging Into the CPA Online Accreditation Platform

In order to log into the CPA online accreditation platform, click on the following link: https://accreditation.cpa.ca/#/auth/login. This should take you to the following page:

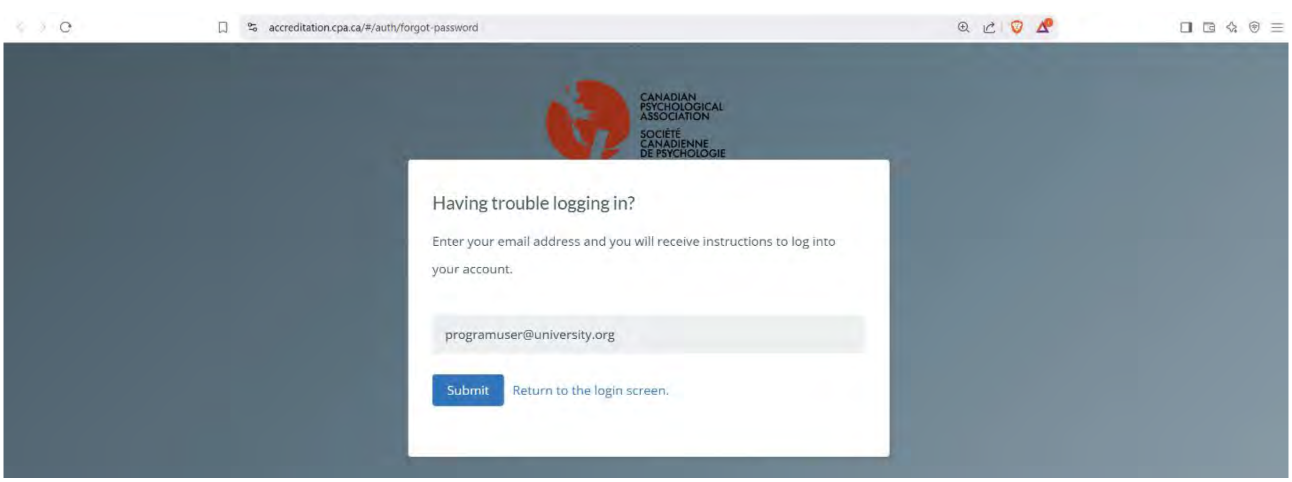


If you have successfully logged into the site previously:

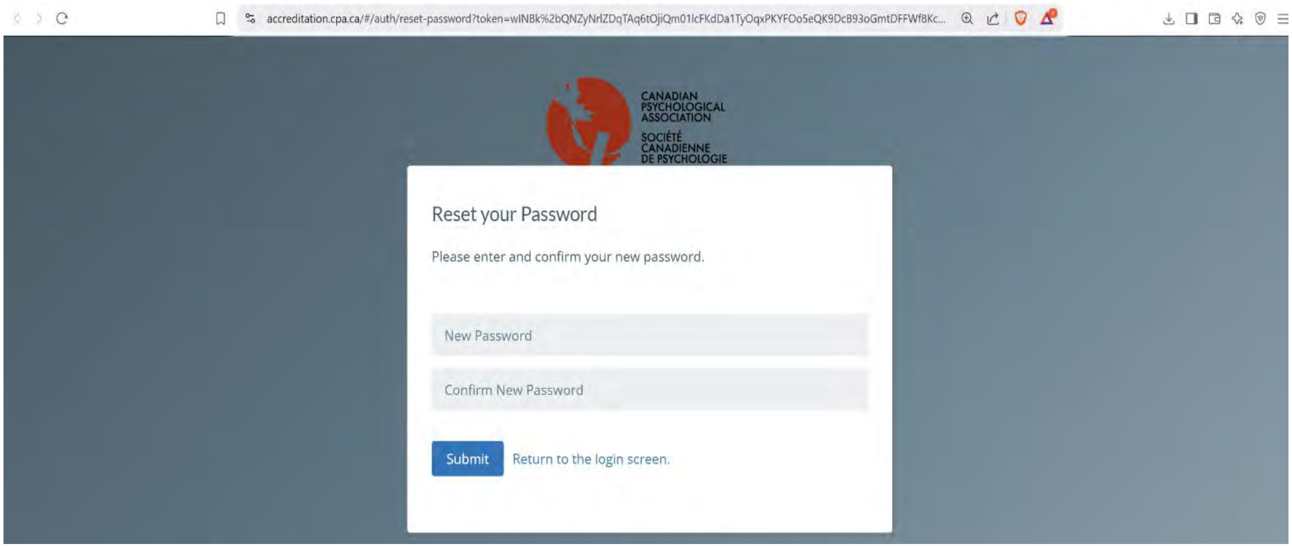
1. Enter your email address
2. Enter your password
3. Click Log In

If this is your first time logging into the site <u>OR</u> if you have forgotten your password:

1. Click "Can't log in or forgot your password?"
2. On the following screen, enter your email address, and click the  button:

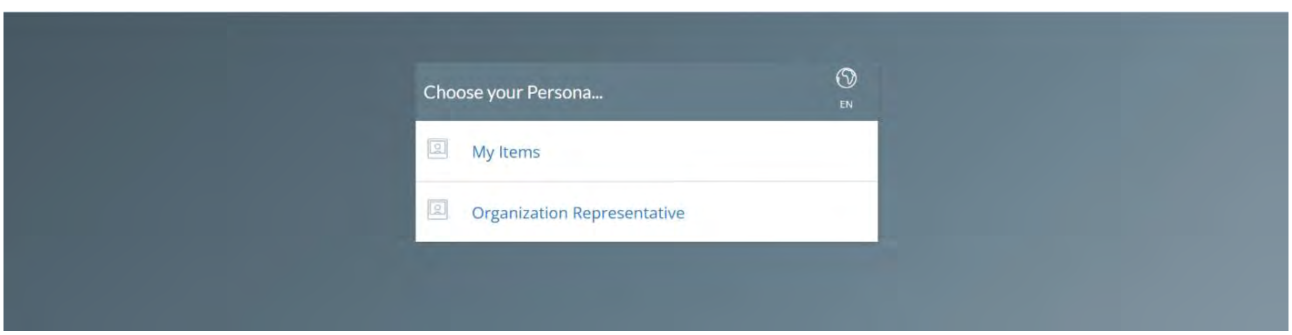


3. Within a few minutes, you should receive an auto-generated email that contains a Reset Password, clicking on it will take you to this screen:



4. Enter a new password in the two fields above, and click the Submit button.
5. You may now click **Return to the login screen**. and enter your email and new password to login.

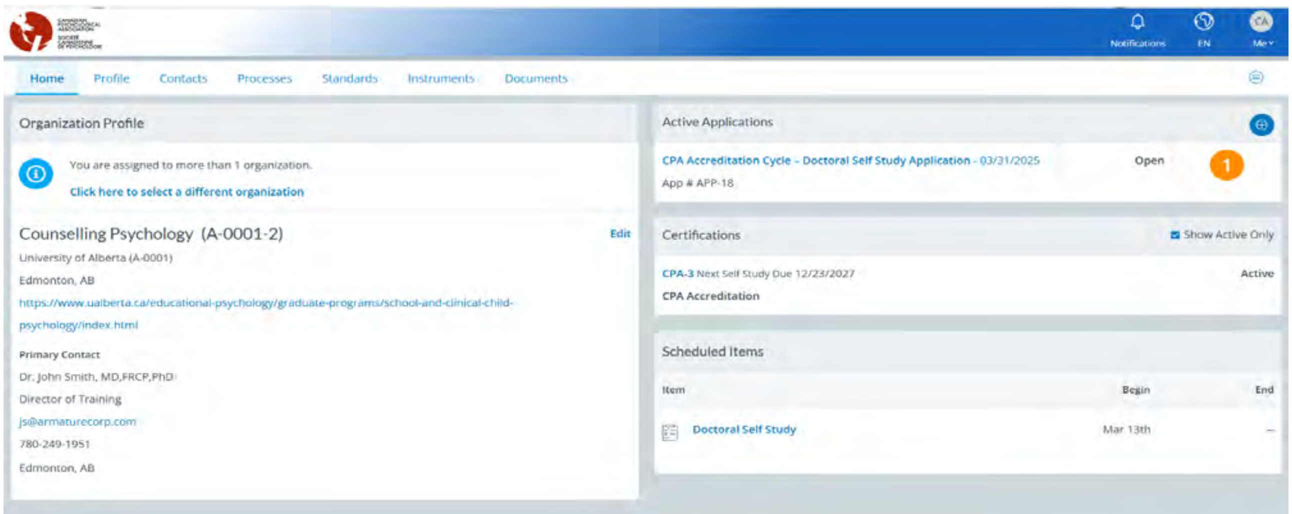
If you do not see an auto-generated email with a reset password link, please check your "Junk" folder or "Others" inbox folder. If the issue persist please contact the CPA Accreditation Office at **accreditationoffice@cpa.ca**. Upon logging in, please select "Organization Representative**"** to access your program's online application platform.



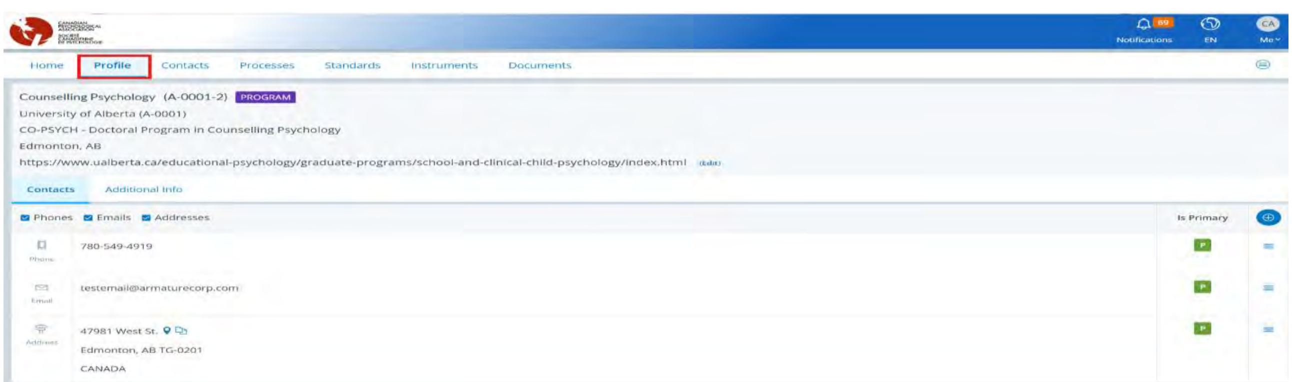
General Use of the Program Dashboard

Each time you re-access the accreditation system, you will land on the **Home** tab of the program dashboard. This page summarizes key information about your program such as:

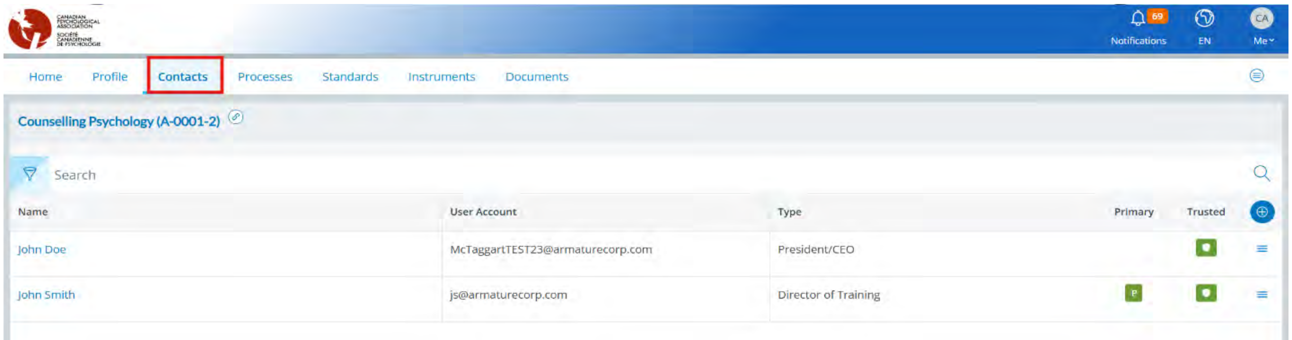
- Organization Profile – Summarizes key contact information
- Active Application – Displays your programs current accreditation cycle (if one is active) with an indicator that will light up in **orange** to indicate an outstanding task (such as a self-study pending submission)
- Certifications – Displays the Next Self Study Due date for your accreditation (if applicable)
- Scheduled Items – Provides an easy link back to a scheduled Self Study or other online application.



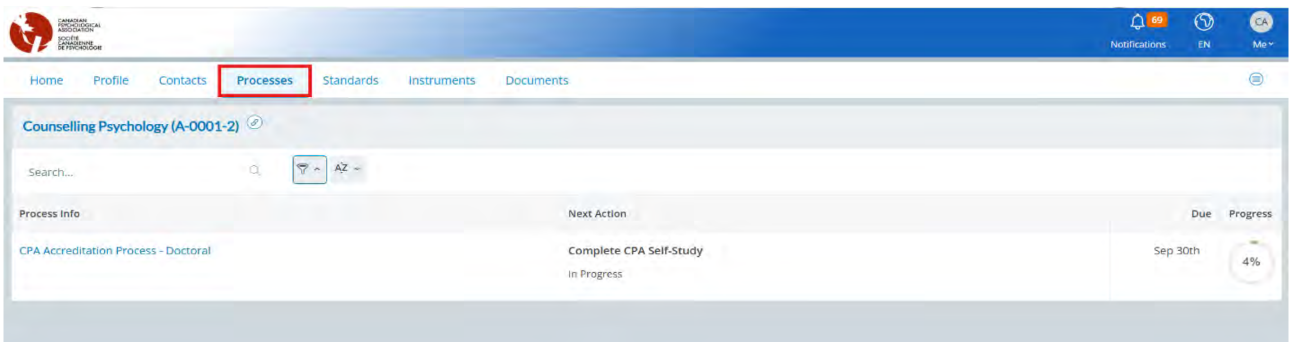
The **Profile** tab will display your program's phone, email, and physical address. The Additional Info sub tab will display a section to enter in any additional information you would like to note about your program:



The **Contacts** tab will allow you to edit contact details for all listed individuals within the program, and allow new individuals to be added as contacts to the program:

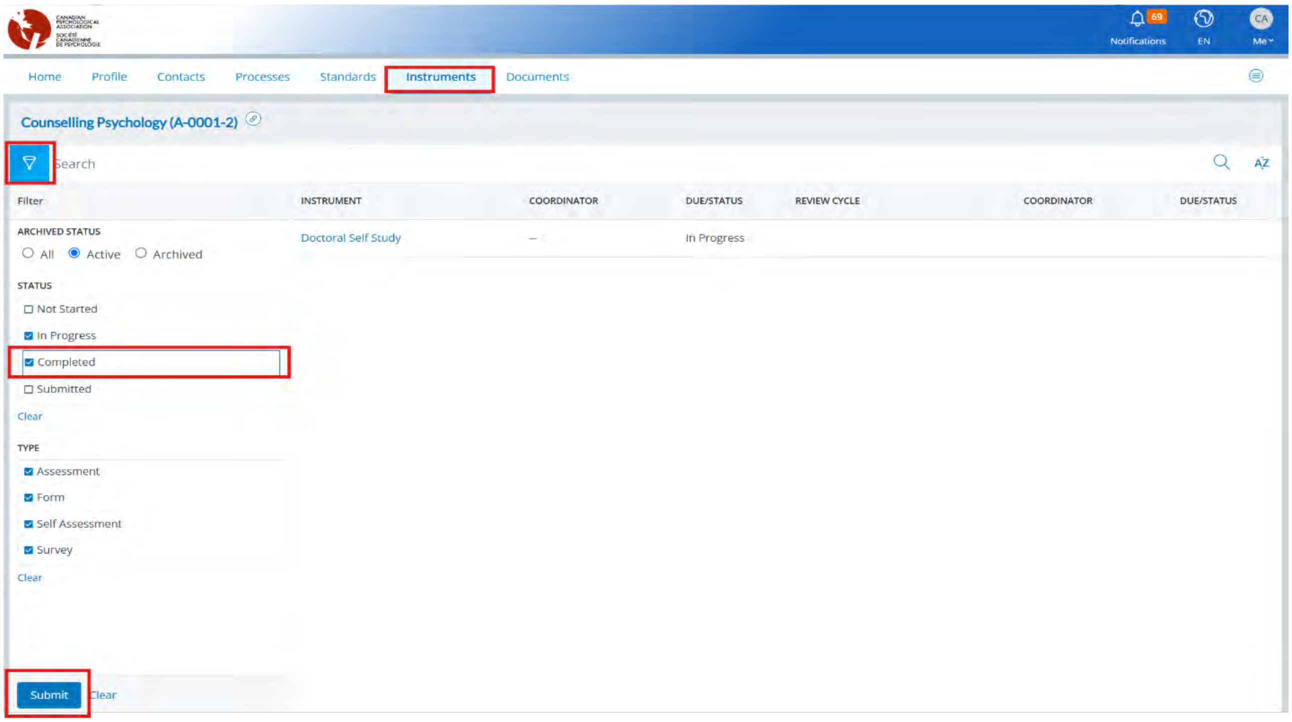


The **Processes** tab will display all Accreditation, Public Disclosure, or Annual Report processes that the program is currently undergoing. “Status” will indicate how close the process is to full completion:

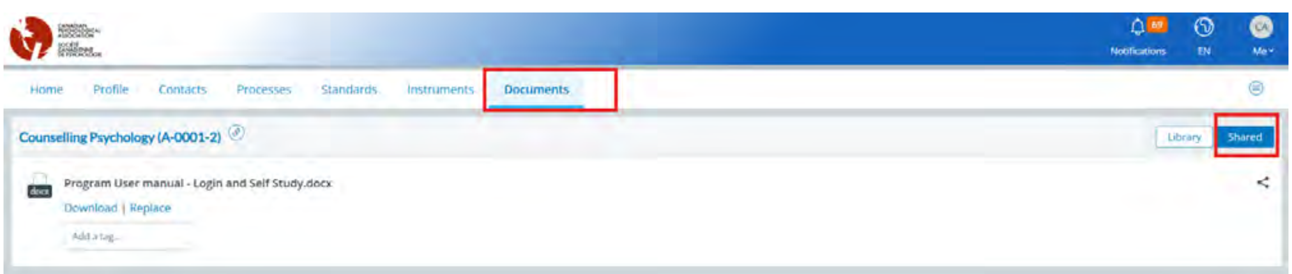


The **Standards** tab will allow you to reference a full list of CPA’s accreditation standards, if desired.

The **Instruments** tab will allow you to see all current and past online applications completed in the system. To re-access applications from previous years, click the Filter icon next to the Search bar, enable “Completed”, and click “Submit”:

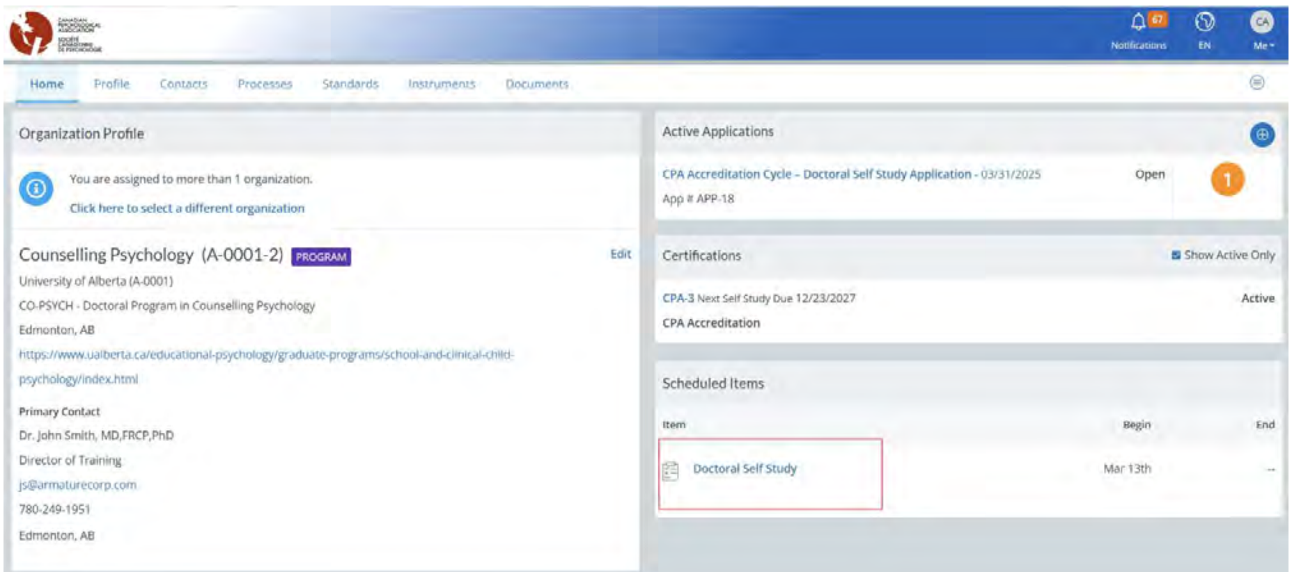


The **Documents** tab will allow you to go to the “**Shared**” documents listing to see all manuals and guides currently shared from CPA. Any item(s) in this list, including this CPA Program User Guide, can be downloaded and accessed here.

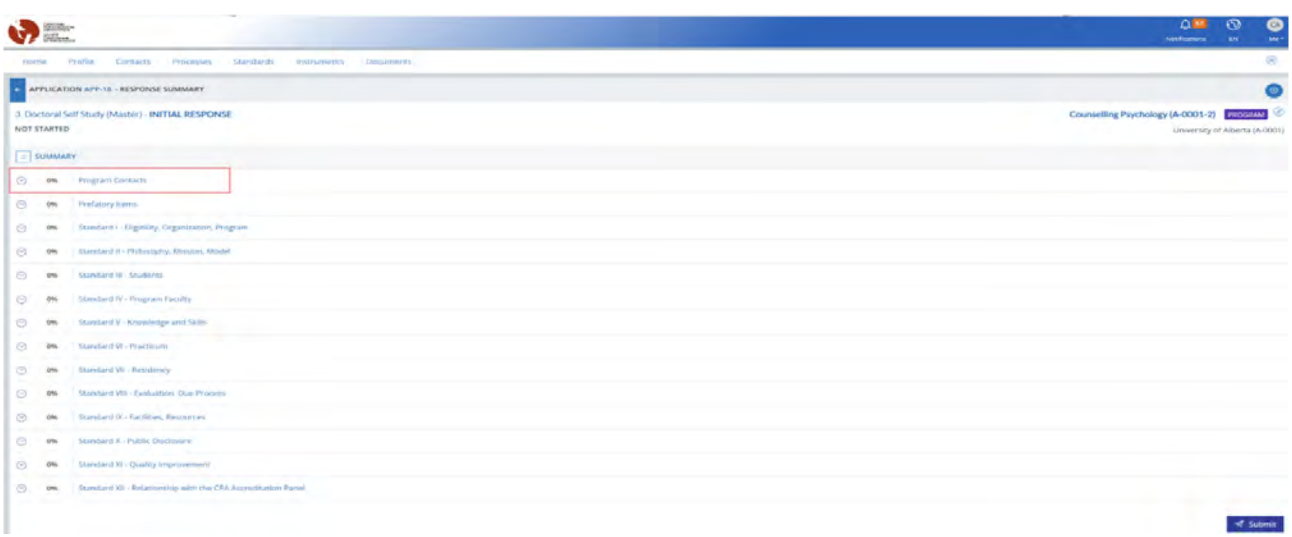


Accessing Your Online Self-Study Application

After choosing “Organization Representative” once you have logged in, you will be taken to the Home page of your program’s online system profile. If there is an accessible self-study active, you will see a link to access it under “Scheduled Items” on the bottom right of the screen as indicated below. Please click this link to access your program’s self-study application:



After clicking on your self-study application, you will be taken to a summary page that shows you each section of the online self-study application and its current progress. To begin the self-study, click on the first section named “Program Contacts”:



Important notes:

- If this is the first time you are submitting your online application, all sections will begin at 0% completion.
- If you have previously submitted an online CPA accreditation or affirmation application using this platform, your most recent application data will be imported making each section start with a 100% completion. This may take up to 48 hours to display once your online self-study application becomes accessible. The import will allow you to review previously submitted data and edit as needed instead of having to add all information in the current self-study application.

Please avoid clicking the Submit button until you have fully reviewed and completed your current online self-study application. Clicking on the Submit button will notify CPA that your self-study has been completed and is now ready for CPA review.

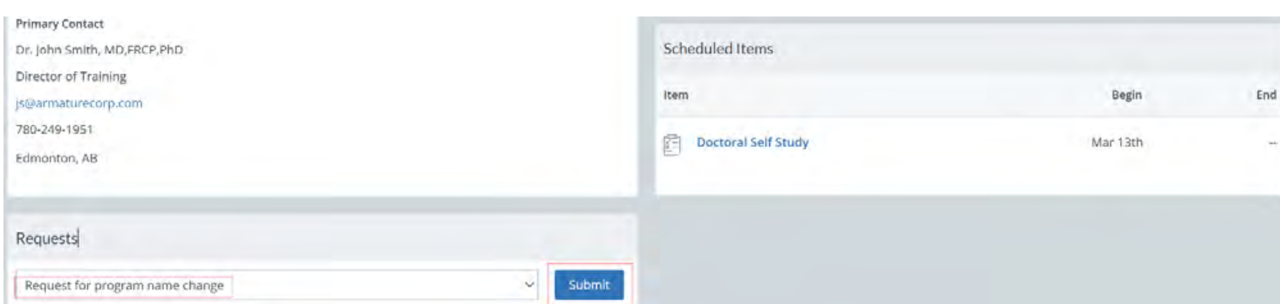
Verifying/Updating Program Contact Information

The first part of your self-study will ask you to verify that your program contact information is up to date.

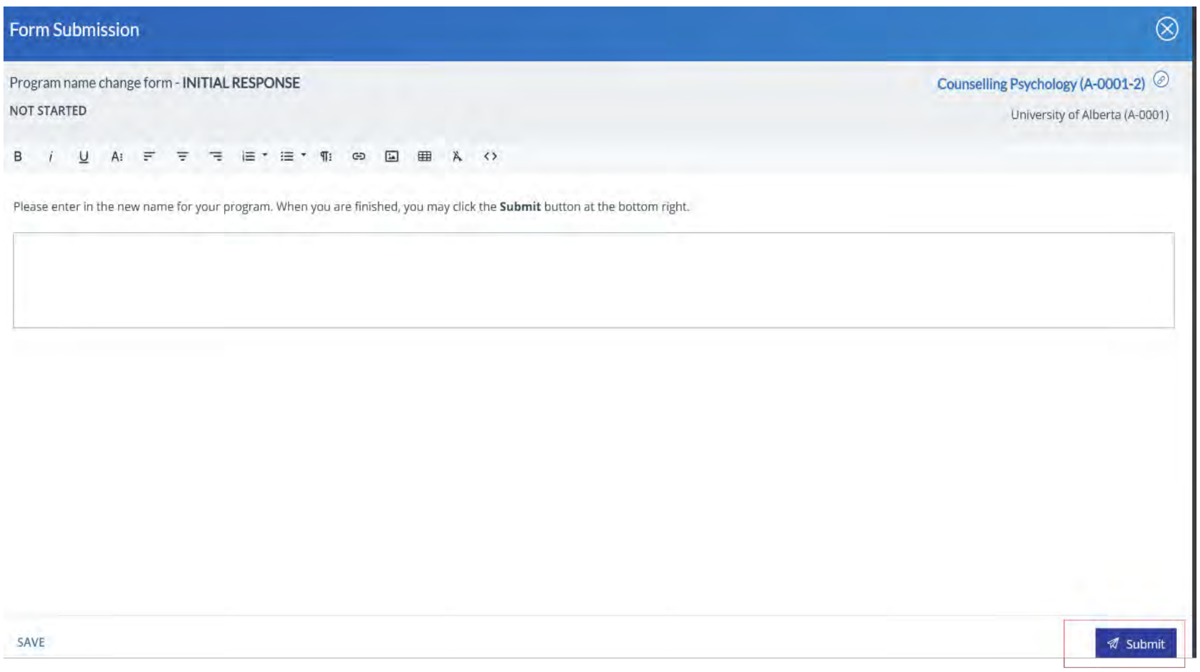
A. Verifying/Updating the Organization Profile Section

Start by verifying that the existing organization name and program name for your program are accurate. If there are changes to be made, follow the instructions below for requesting a program name change.

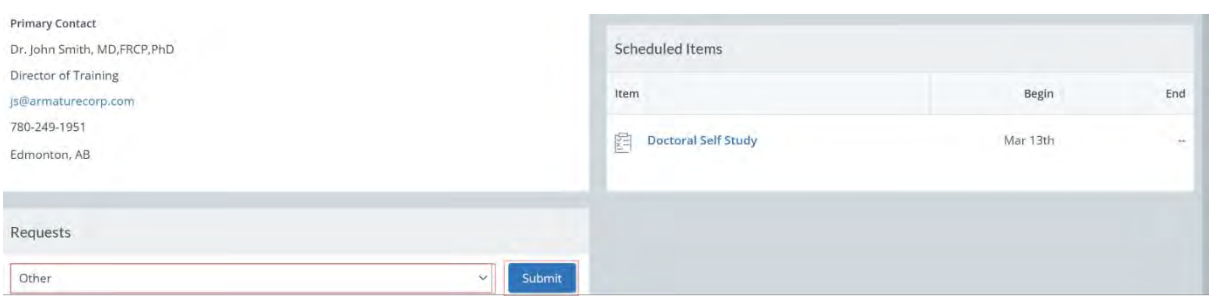
1. Scroll down to the Requests list, and select "Request for program name change" and click Submit :

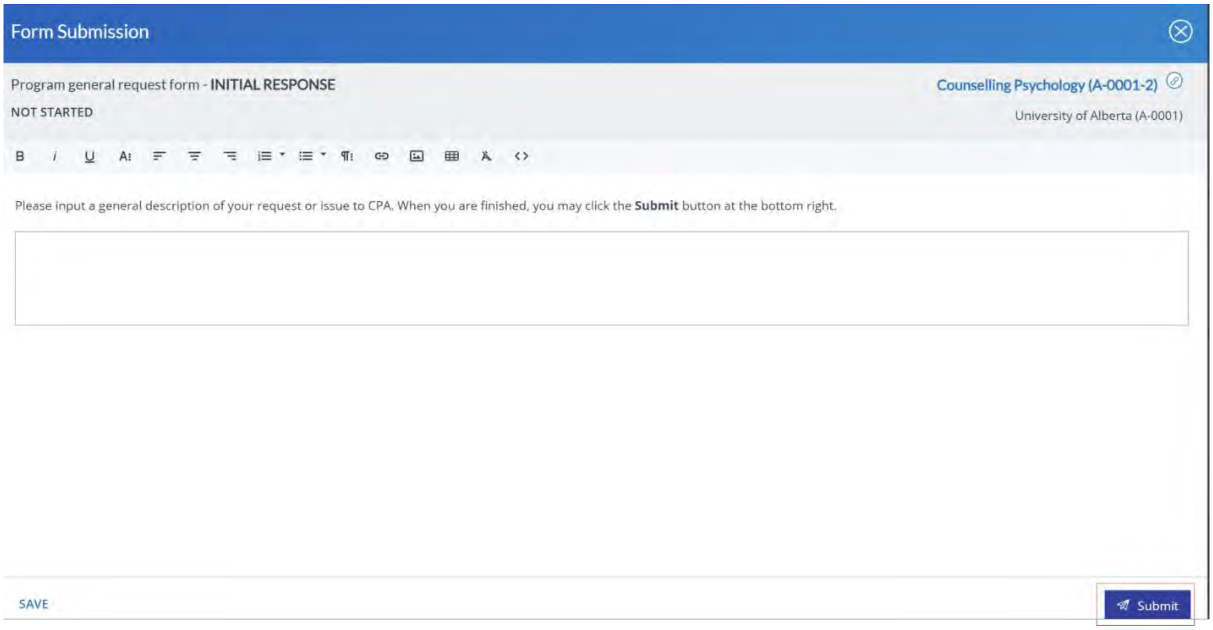


2. On the following form, enter the new name and click  . The name should be in the following format: **Organization Name - Program Name.** This will send the request to the CPA Accreditation office for processing. If the primary contact of the program does not receive a confirmation email letting the program know that the name change has been processed within one week of the request, please follow-up by sending an email to accreditationoffice@cpa.ca specifying the nature of the request and the date it was submitted using the CPA online application portal.

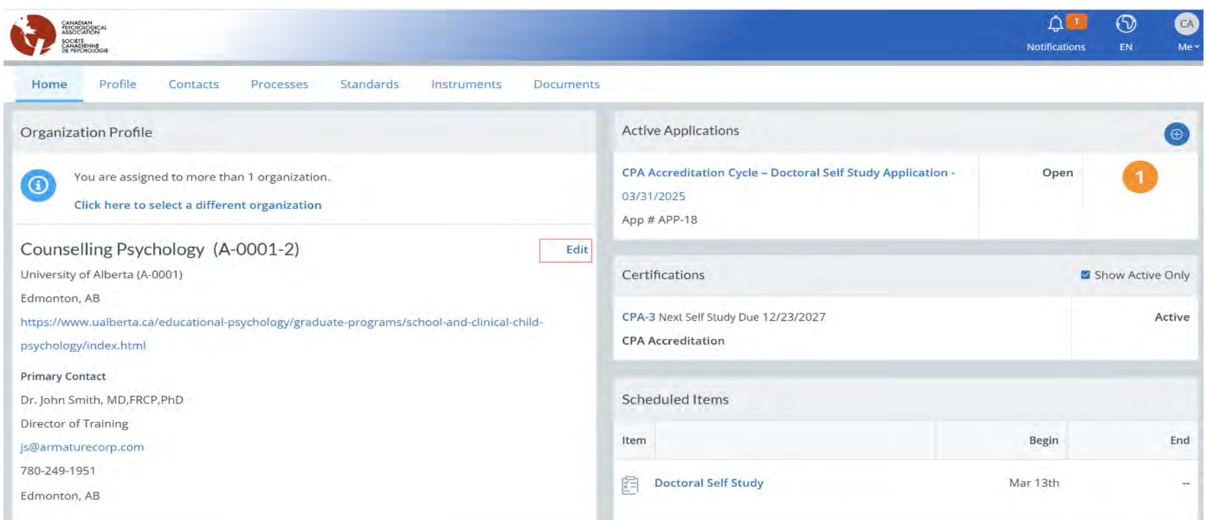


If you have a request to send to CPA that is not a name change, please select "Other" in the request dropdown menu, then click  and type in your request in the text field that appears after submitting.

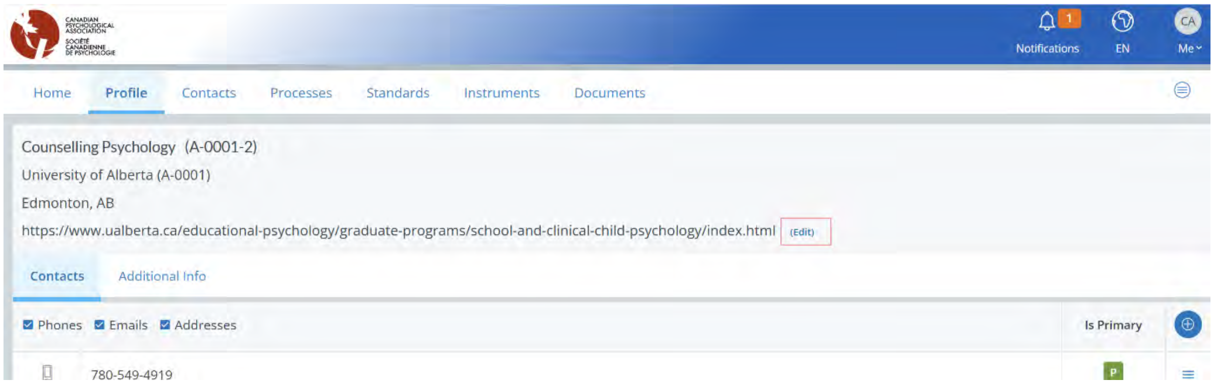




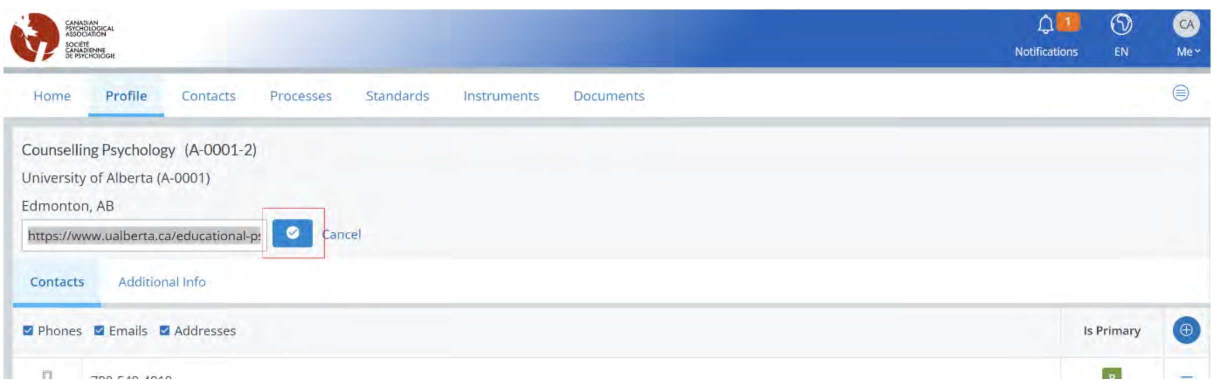
To verify/update any other Organization Profile information, click on the blue Edit link next to your program's name indicated below:



To edit the webpage link for your program, click on the blue (Edit) icon indicated below:



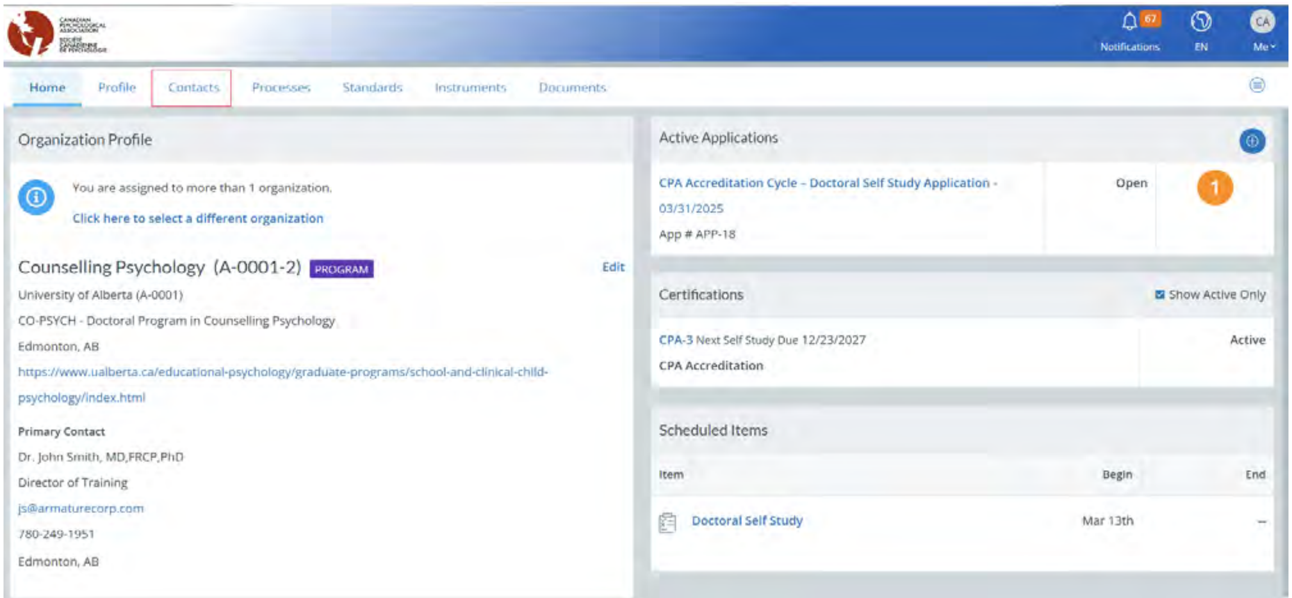
Copy-paste the webpage link into the text field and click on the blue checkmark to save as indicated below:



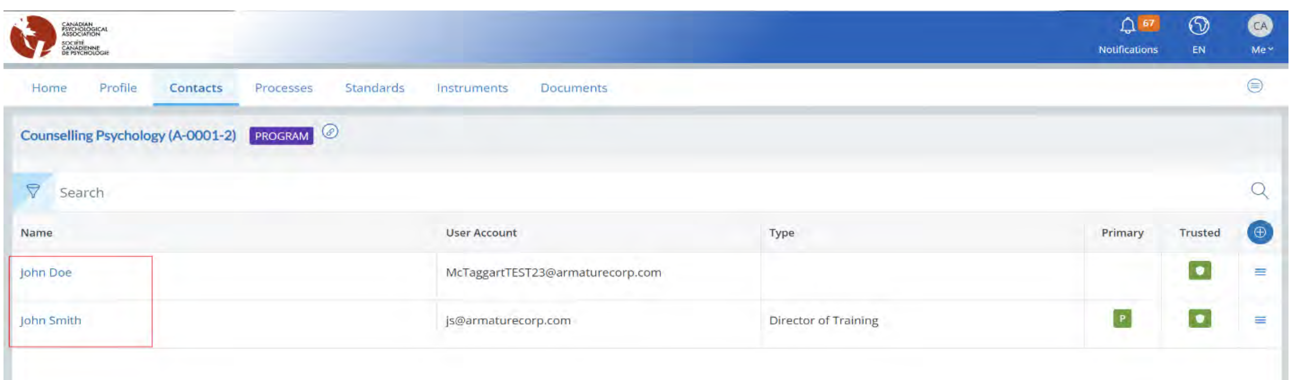
B. Verifying/Updating Existing Contact Information

To verify/update existing contact information, follow the instructions described below:

1. Go to your [Program Home Page](), and select the Contacts tab indicated below:



2. From the Contacts list, verify/update information for existing contacts by clicking on each of the contact's names:

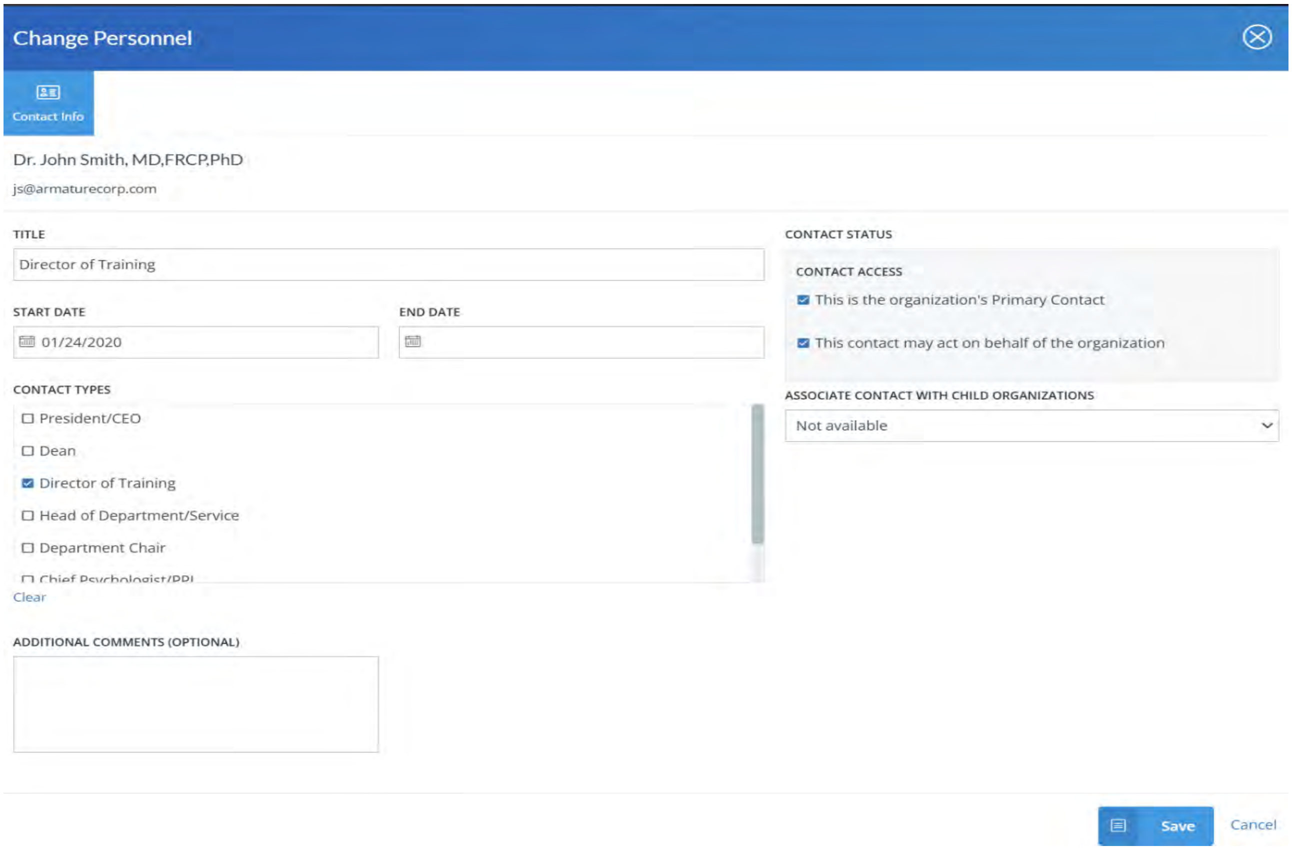


<u>Important Note:</u>

- At a minimum, each program is required to provide updated contact information for four types of organization personnel:

    i. President/CEO of the organization
    ii. Dean/Head of Department or Service of the organization
    iii. Department Chair/ Chief Psychologist or Professional Practice Leader of the organization
    iv. Director(s) of Training of the program

3. From this screen, you will see a set of fields to update the user's contact information.



As shown in the screenshot provided above, you will see the following option fields.

TITLE: This is a text field for the contact's role or title in the program. It is not necessary to fill in this field if the title/role of the contact is the same as that chosen from the “Contact Types” menu.

START DATE & END DATE: This is the date that the contact has started in their current position and is expected to leave their current position in the program. This information is optional, you may leave these fields blank if you wish.

CONTACT TYPES: This is the role of the contact within the program. This is a mandatory field; you must choose the appropriate contact roles/titles from the list provided.

CONTACT STATUS:

☐ "This is the organization's Primary Contact" - Only **<u>one</u>** program contact may have this selected. This marks them as the main point of contact for the program (e.g., the Director of Training).

- ☐ "This contact may act on behalf of the organization" - This allows the contact to log into the program's online profile using their listed email and access and/or update their data. Multiple contacts may be granted this access.

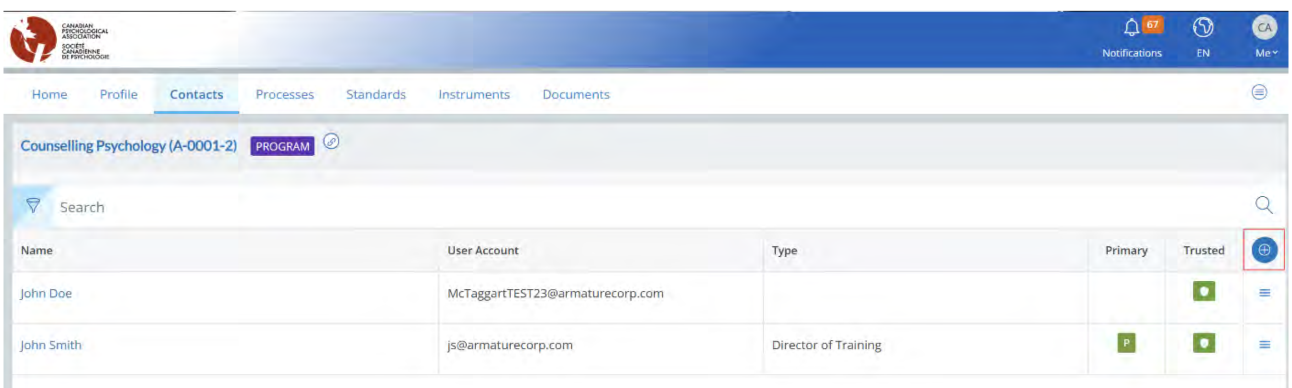
<u>ASSOCIATE CONTACT WITH CHILD ORGANIZATION</u>: There is no need to answer this field.

<u>ADDITIONAL COMMENTS</u>: This is a text field to enter any additional information that you would like CPA to have about this program contact.

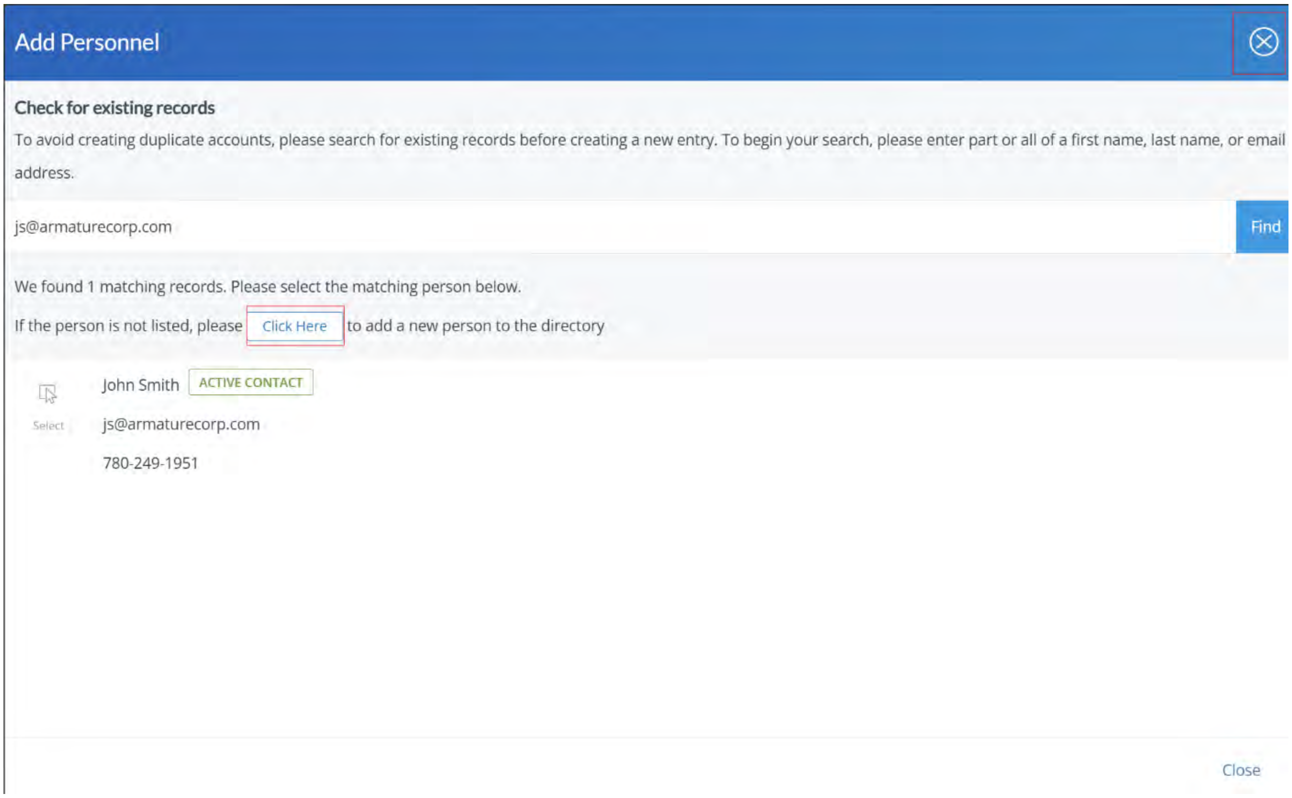
C. Adding New Contact Information

To add a new program user’s contact information, follow the steps below:

1. Click on the blue  button on the right of the webpage under the Search bar indicated below:

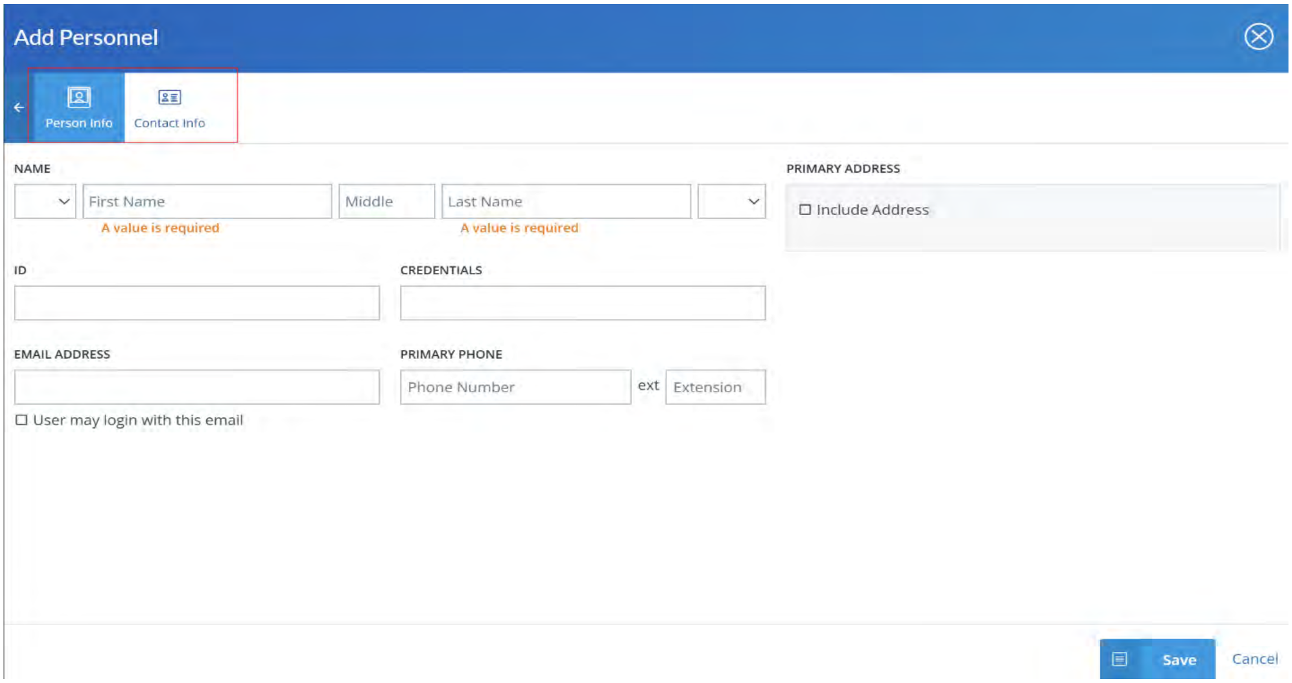


2. Enter the contact's first name, last name, or email address in the search bar to verify that they are not an existing contact.



3. If the contact already exists in the system, click on the top right to close the "Add Personnel" window and follow steps 2 and 3 of section B on pages 12-13 to update the contact information of pre-existing program contacts.

4. If the contact has not previously listed in the system, click on the "Click Here" button and enter the required information under the "Person Info" and "Contact Info" tabs:



<u>Person Info</u>

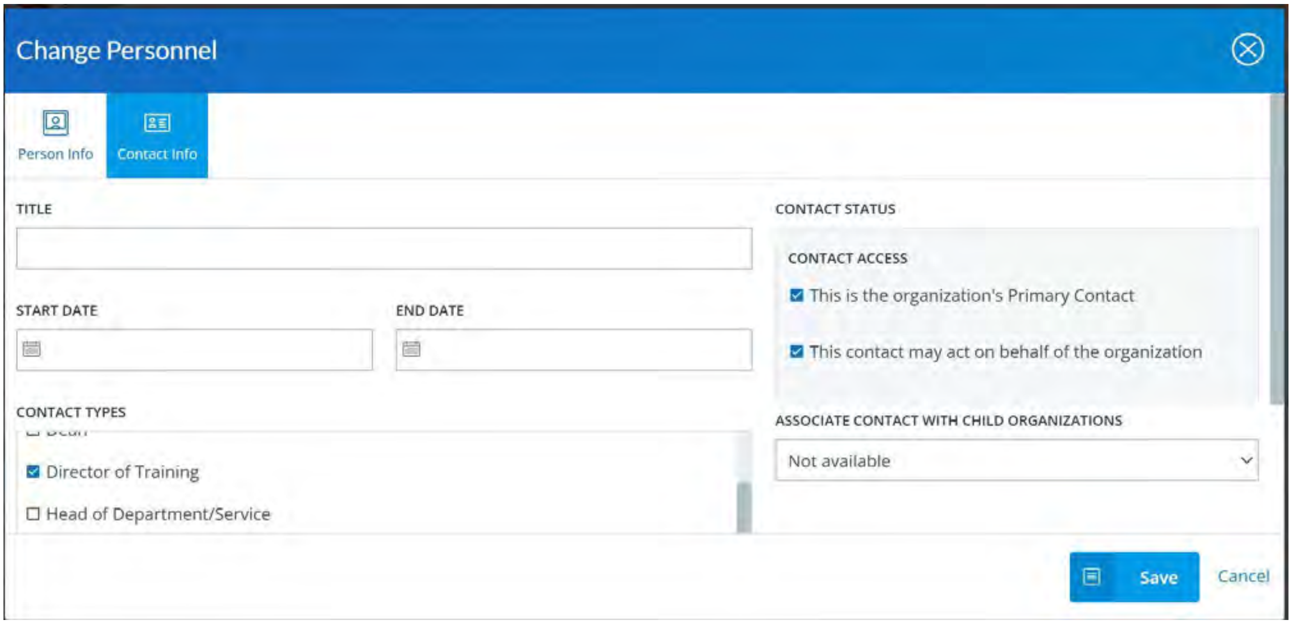
* Note that adding a new contact will require you to enter at least a First Name, Last Name, and Email Address under the "Person Info" tab. Please also choose a courtesy title from the drop-down menu and click the “Include Address” checkbox to add an address for each program contact name added.

** If you would like the new contact to be able to access the online application, click on the "User may login with this email" checkbox. This type of access is usually granted to the Director of Training of a program who is usually the person responsible for filling in and submitting the online self-study application and any other personnel who the program would like to grant edit accessibility to such as a program coordinator or administrator. Leaving this checkbox blank will allow this person to be added as a program contact without giving them access to the online application platform.

<u>Contact Info</u>

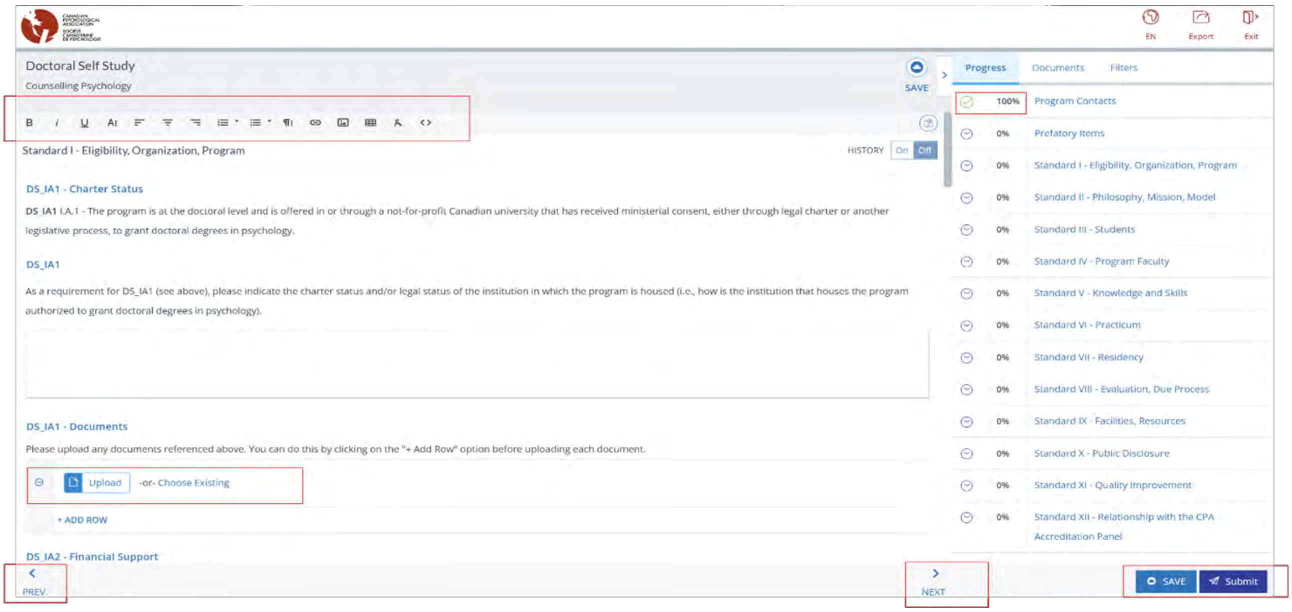
* At a minimum, each contact listed must have one or more options checked under the CONTACT TYPES menu.

** Under CONTACT STATUS, the applicant must choose the CONTACT ACCESS option(s) that are appropriate for each program contact listed as shown below:



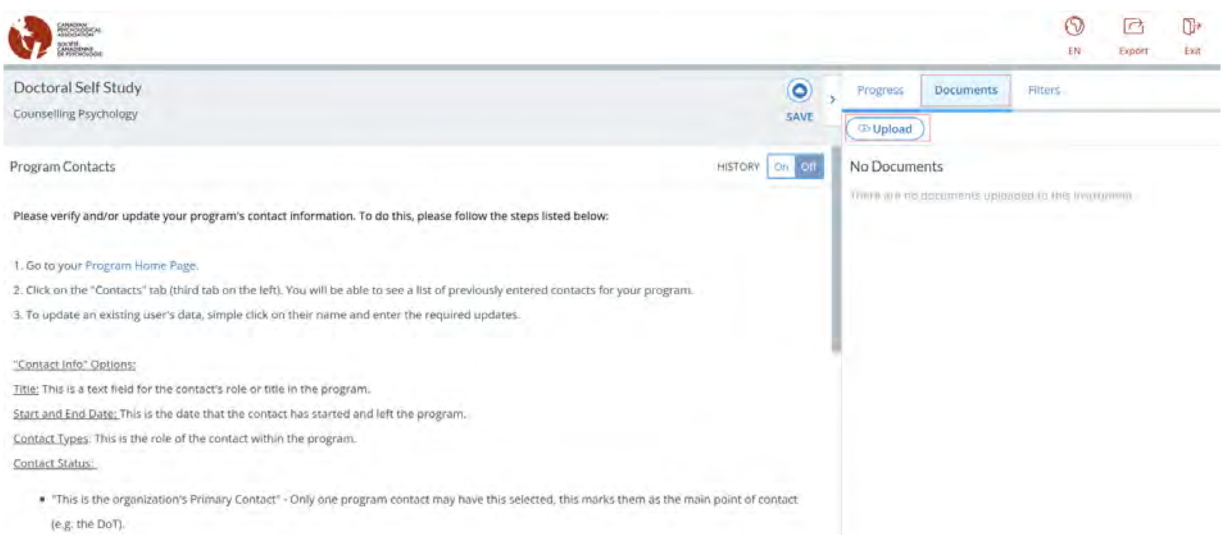
Tips for Completing Your Online Self-Study Application

1. At the top of each page, you will find a rich text editor for any questions with a large text box.
2. When uploading documents to the self-study, if you would like to use a document that you have previously uploaded as an answer to a question, you may click “Choose Existing” rather than “Upload” *(a list of all previously uploaded documents to this self-study can be found on the “Documents” tab near the top right of the screen).*
3. You may use the **“< PREV.”** and **“NEXT>” buttons** to navigate to the previous or next sections of the self-study. Clicking these buttons will also save your progress in the current section.
4. Before leaving the self-study, be sure to click “Save” to not lose any progress made.
5. Please avoid clicking “Submit” until you have completed and reviewed every section of the self-study. All sections should have a 100% completion rate and a green check mark to the left of the section tab on the right of the page before you are able to submit the online application.

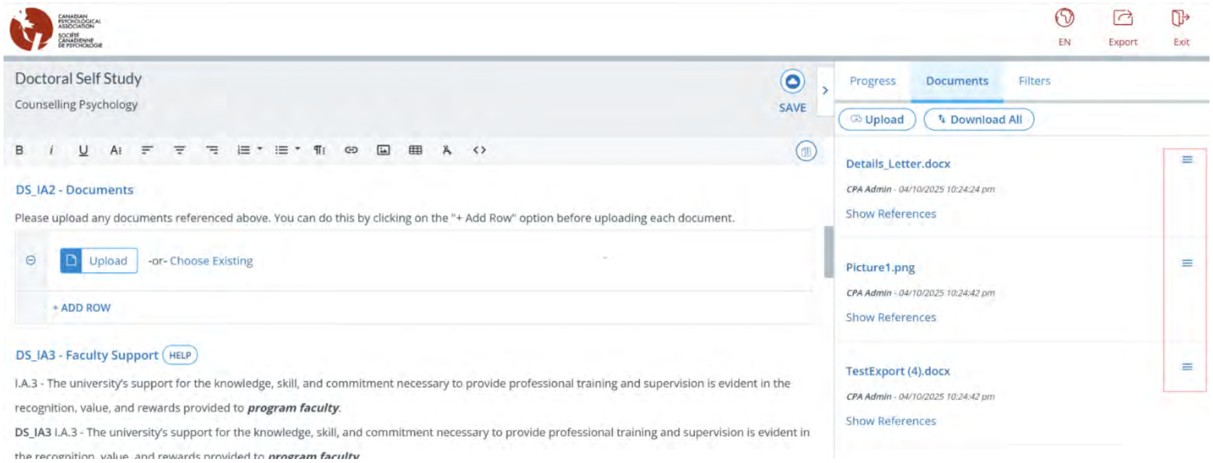


Mass Upload of Documents to the Online Self Study Application

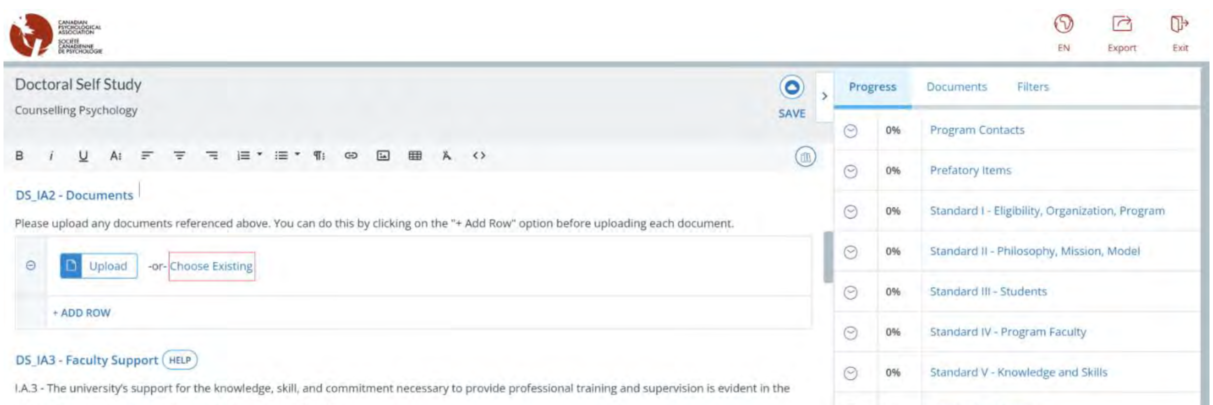
Within your online self-study application, you may mass upload documents. This function is especially important for *Standard V – Knowledge and Skills* where programs are asked to mass upload course outlines. To mass upload documents, click on the "Documents" tab at the top right of the page. Uploading to this section will allow for a large set of documents to be uploaded to the self-study for future reference:



Any document added to this tab may be deleted if they do not exist in any answer to any question throughout the self-study. Deleting can be done by clicking on the blue icons indicated below:



Within your online self-study you may also mass upload documents that you intend to reference throughout your application. Once uploaded, you can quickly add the previously uploaded documents by clicking the "Choose Existing" *o*ption indicated below when answering document questions throughout the self-study:



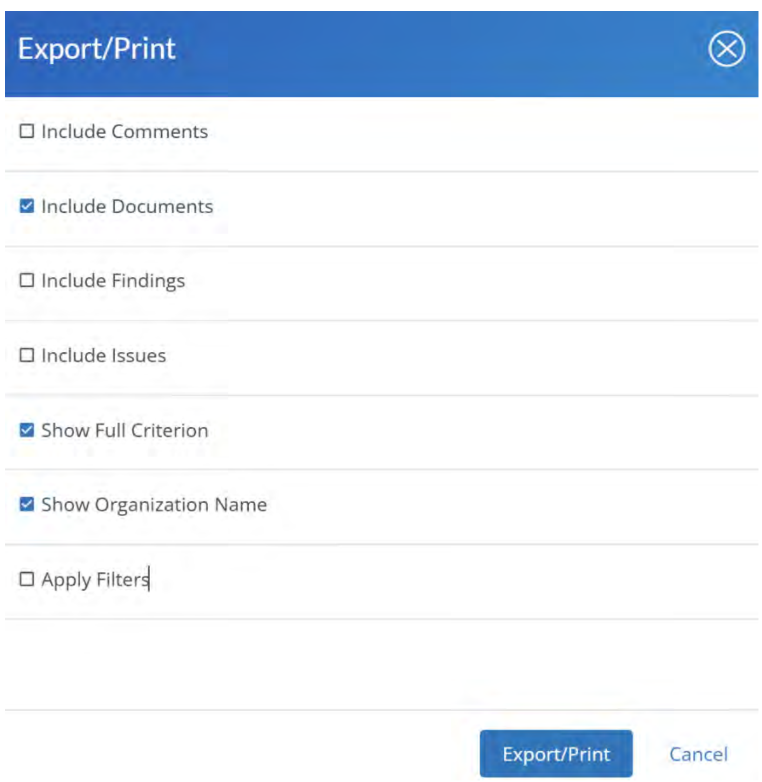
Exporting Your Online Self-Study Application to a PDF Format

Within every section/page of your self-study, you will see a button labeled “Export” on the top right of the screen:

Clicking Export will take you to a settings screen to export a copy of your online self-study application to a PDF document. To ensure you self-study has all available information included, please select:

- Include Documents
- Show Full Criterion
- Show Organization Name

After selecting these the three options, click “Export/Print” as indicated in the screenshot:



On the next screen, click the “Export” button on the top right of the screen to download your submitted self-study application in PDF format: