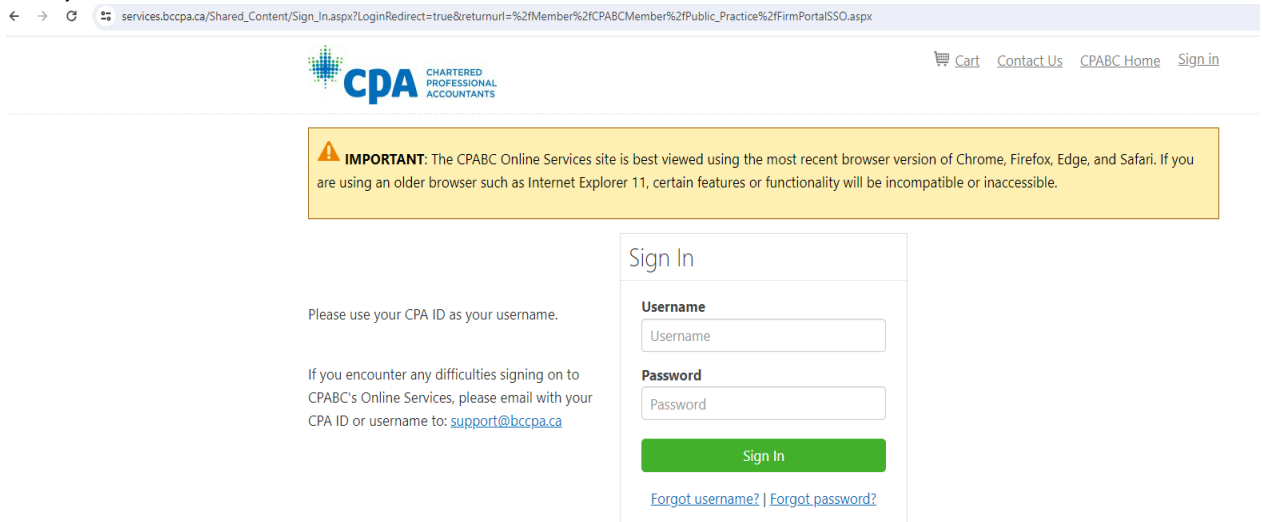


## PRACTICE REVIEW – FIRM PORTAL INSTRUCTIONS

1. Navigate to the following URL: <https://prs.bccpa.ca/firm-portal>
2. Log in to your CPABC Online Services account with your username and password.

If you encounter any difficulties signing into CPABC's Online Services, please email [support@bccpa.ca](mailto:support@bccpa.ca) with your CPA ID or username.



← → services.bccpa.ca/Shared\_Content/Sign\_In.aspx?LoginRedirect=true&returnurl=%2fMember%2fCPABCMember%2fPublic\_Practice%2fFirmPortalSSO.aspx

**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

Cart Contact Us CPABC Home Sign In

**IMPORTANT:** The CPABC Online Services site is best viewed using the most recent browser version of Chrome, Firefox, Edge, and Safari. If you are using an older browser such as Internet Explorer 11, certain features or functionality will be incompatible or inaccessible.

Please use your CPA ID as your username.

If you encounter any difficulties signing on to CPABC's Online Services, please email with your CPA ID or username to: [support@bccpa.ca](mailto:support@bccpa.ca)

**Sign In**

**Username**  
Username

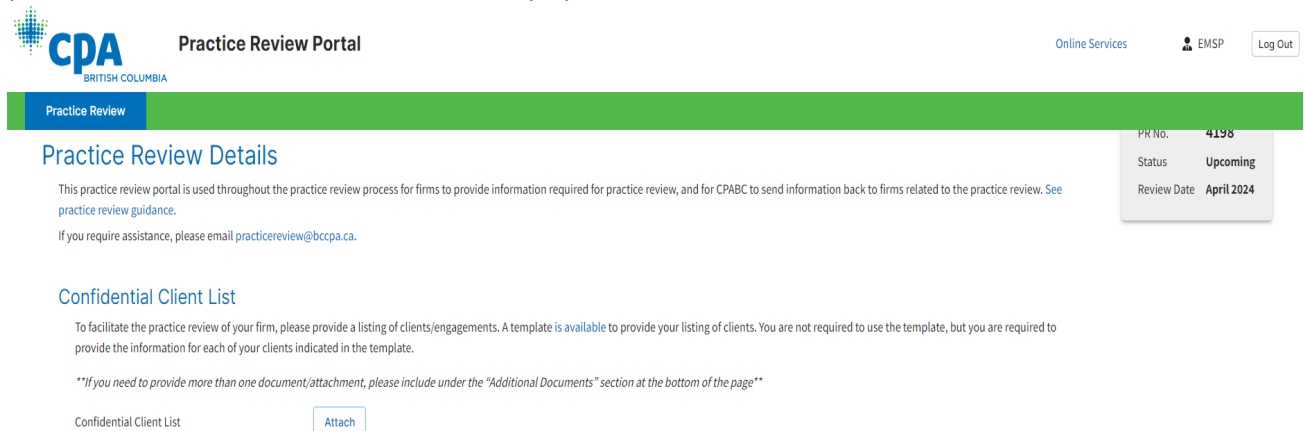
**Password**  
Password

Sign In

[Forgot username?](#) | [Forgot password?](#)

### Client List Submission:

Upon successfully logging in (Step #2 above), you will be directed to the home screen where you can submit your client list which will be received directly by the CPABC Practice Review team.



**CPA** BRITISH COLUMBIA Practice Review Portal

Online Services EMSP Log Out

Practice Review

### Practice Review Details

This practice review portal is used throughout the practice review process for firms to provide information required for practice review, and for CPABC to send information back to firms related to the practice review. See [practice review guidance](#).

If you require assistance, please email [practicereview@bccpa.ca](mailto:practicereview@bccpa.ca).

**Confidential Client List**

To facilitate the practice review of your firm, please provide a listing of clients/engagements. A template is available to provide your listing of clients. You are not required to use the template, but you are required to provide the information for each of your clients indicated in the template.

*\*\*If you need to provide more than one document/attachment, please include under the "Additional Documents" section at the bottom of the page\*\**

Confidential Client List

PR No.	4198
Status	Upcoming
Review Date	April 2024

3. Under the "Confidential Client List" section, click the "Attach" button.
4. Locate the saved client list file found on your computer and select it by clicking on the file name to upload. If an incorrect file is selected, this can be removed by hovering over the document title and clicking the 'trash bin' icon, *prior* to submitting.
5. Click "Submit".

### **Client List Submission Notes:**

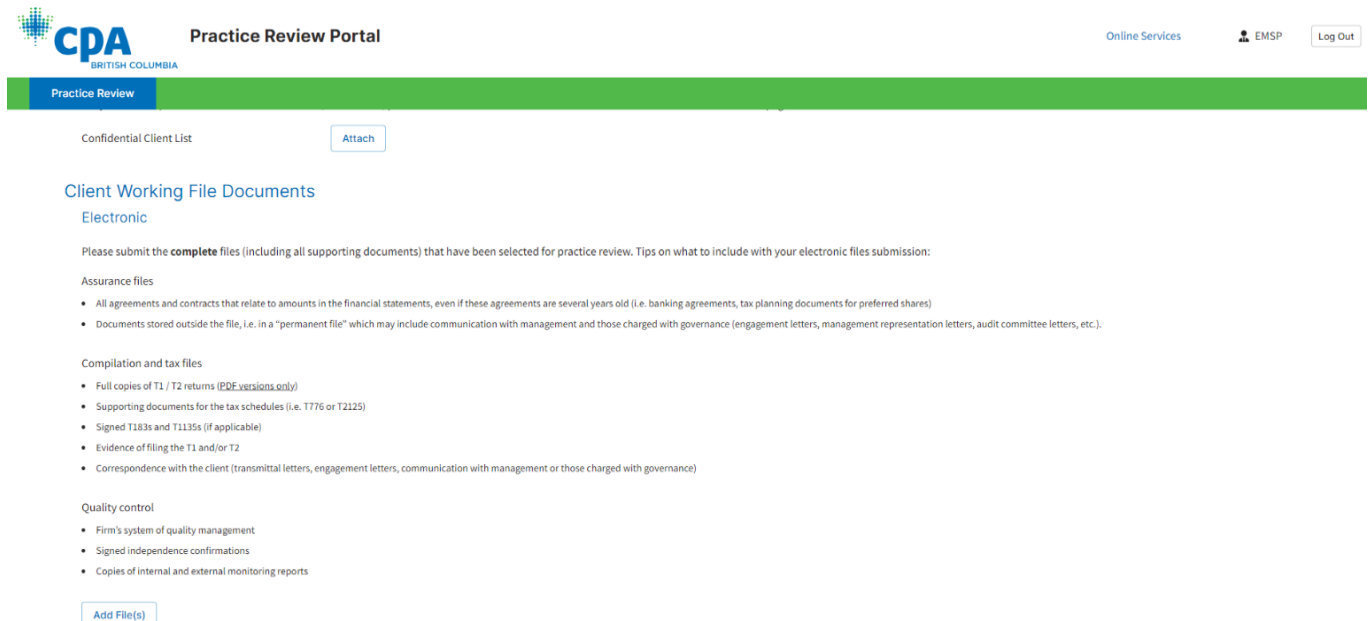
- CPABC client list template can be found here: [Practice Review Guidelines Templates \(bccpa.ca\)](http://www.bccpa.ca/Practice-Review-Guidelines-Templates)
- File formats accepted: Word, Excel, and PDF (only).
- For your client list submission, we are unable to receive multiple documents so please ensure your submission only consists of **one** document.
- There is no requirement to password protect your client list as the portal is secured.
- If you submit a document in error, please contact the Practice Review Team at [practicereview@bccpa.ca](mailto:practicereview@bccpa.ca) to reset the submission process.

### **Inspection Files and System of Quality Management (“SQM”) Submission:**

Your client files (as selected by your practice review officer) and SQM will also be submitted through the Firm Portal under the “**Client Working File Documents**” section (*see screenshot below*):

6. Under the "Client Working File Documents" section, click the "Attach File(s)" button.
7. Locate the appropriate client file(s) on your computer and select it by clicking on the file name to upload.
  - a. If you are submitting a Caseware file, please ensure the file is compressed.
8. Click “Submit” button.

Screenshot below for reference:



The screenshot shows the CPA Practice Review Portal interface. At the top left is the CPA logo and the text 'Practice Review Portal'. On the right, there are links for 'Online Services', 'EMSP', and a 'Log Out' button. A green navigation bar contains the text 'Practice Review'. Below this, there is a section for 'Confidential Client List' with an 'Attach' button. The main content area is titled 'Client Working File Documents' and 'Electronic'. It includes instructions: 'Please submit the complete files (including all supporting documents) that have been selected for practice review. Tips on what to include with your electronic files submission:'. There are three sub-sections: 'Assurance files', 'Compilation and tax files', and 'Quality control', each with a list of required documents. At the bottom, there is an 'Add File(s)' button.

### ***Inspection Files Submission Notes:***

Please only submit **completed** files (which should include a copy of the final signed financial statements (“FS”) and the Caseware file, if relevant) that have been selected for practice review. Additional considerations to include with your electronic submission:

#### Assurance Files:

- All agreements and contracts that relate to amounts or disclosures in the FS, even if these agreements are several years old (i.e. banking/lender agreements, tax planning documents for preferred shares)
- Documents that may be stored outside the Caseware file (i.e. in a “permanent file” which could include communication with management and those charged with governance – engagement letters, management representation letters, audit committee letters, etc.)

#### Compilation and Tax Files:

- Full copies of T1 and/or T2 returns (**PDF versions only**)
- Supporting documents for the tax schedules (i.e. T776 or T2125)
- Signed T183s (if tax returns were filed electronically)
- Evidence of filing the T1 and/or T2
- Correspondence with the client (transmittal letters, engagement letters, communication with management or those charged with governance)

#### System of Quality Management:

- Copy of the firm’s system of quality management
- Signed staff independence confirmations
- Copies of the most recent annual and cyclical monitoring reports