

PRACTICE REVIEW – FIRM PORTAL INSTRUCTIONS

Logging into the Portal

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 with your CPA ID or username.

← → services.bccpa.ca/Shared_Content/Sign_In.aspx?LoginRedirect=true&returnurl=%2fMember%2fCPABCMember%2fPublic_Practice%2fFirmPortalSSO.aspx



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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

Sign In

Username

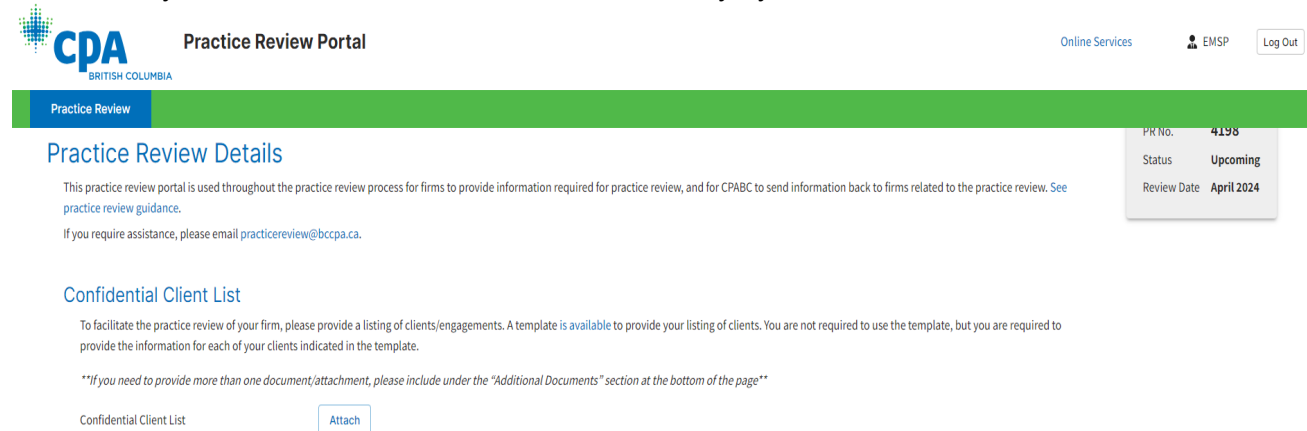
Password

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.



The screenshot shows the CPABC Practice Review Portal interface. At the top, there is a header with the CPA logo and the text "Practice Review Portal". To the right of the header, there are links for "Online Services", "EMSP", and a "Log Out" button. Below the header, there is a green bar with the text "Practice Review". The main content area is titled "Practice Review Details" and includes a brief description of the portal's purpose and a link to "practice review guidance". Below this, there is a section titled "Confidential Client List" with instructions on how to provide client information. At the bottom of this section, there is a button labeled "Attach" next to the text "Confidential Client List".

1. Under the "**Confidential Client List**" section, click the "**Attach**" button.
2. 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.
3. Click "**Submit**".

Client List Submission Notes:

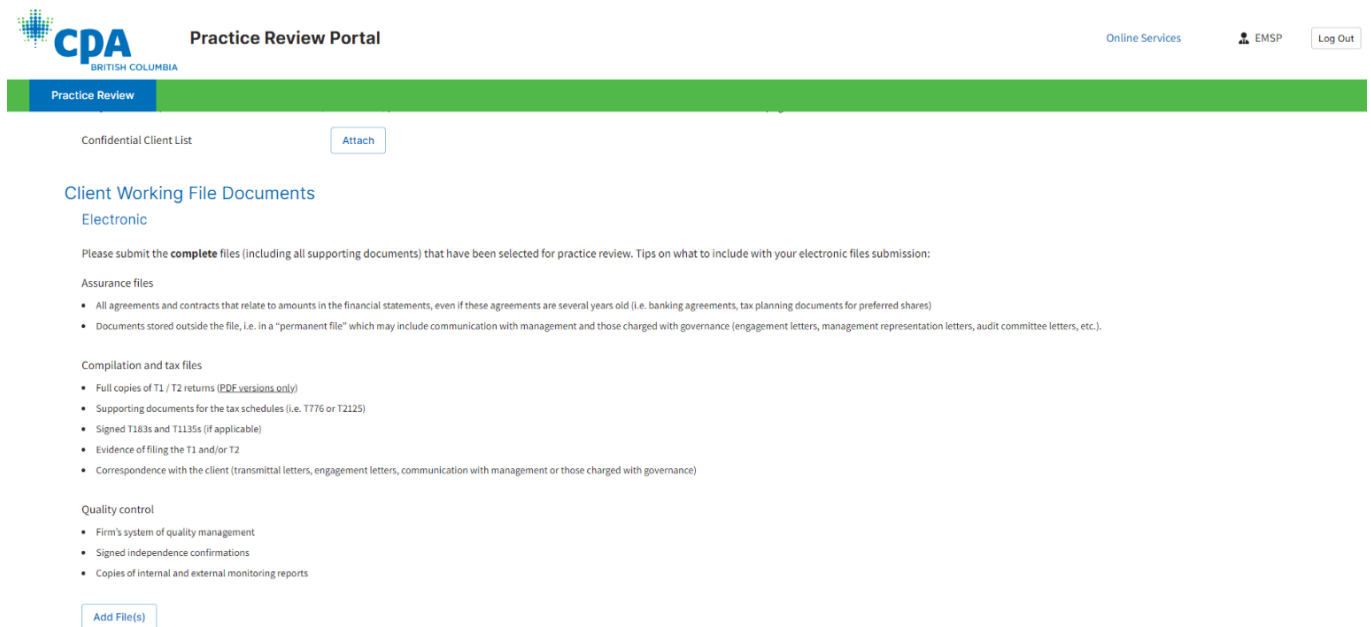
- CPABC client list template can be found at the CPABC [website](#) – Practice Review (*Member & Practice Regulation / Public Practice / Practice Review*)
- File formats accepted: Word, Excel, and PDF (only).
 - Please ensure the list contains at minimum the following information:
 - Name of engagement partner/ authorized staff
 - Name of Client
 - Type of Engagement
 - Financial Reporting Framework
 - Industry/sector of client
 - Factors to note* are identified for assurance engagements
- 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 secure.
- If you submit a document in error, please contact the Practice Review Team at practicereview@bccpa.ca to reset the submission process.

Inspection Files and System of Quality Management (“SOQM”) Submission:

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

1. Under the **“Client Working File Documents”** section, click the **“Attach File(s)”** button.
2. Locate the appropriate client file(s) on your computer and select it by clicking on the file name to upload.
 - If submitting a series of documents for a client (Word, PDF, Excel, etc.) please ensure to upload these documents together in zipped folders, **with 1 zipped folder per client**.
 - If you are submitting a Caseware file, please ensure the file is **compressed**.
 - If you are using Caseware Cloud, prior to submitting the file, you must go into the file and disable the security via Tools -> Protection -> “Turn Cloud Protection Off”
 - Files with the any of the following characters will be rejected: " * : < > ? / \ | # %
 - i. If needed, it is safe to use both dashes (-) and underscores (_) in file names
 - Leading and trailing spaces in file or folder names are not allowed
 - There is a URL character limit of 255 characters
3. Click **“Submit”**.

Screenshot below for reference:



The screenshot shows the CPA Practice Review Portal interface. At the top, there is a header with the CPA logo, 'Practice Review Portal', and links for 'Online Services', 'EMSP', and 'Log Out'. Below the header is a green navigation bar with 'Practice Review' selected. The main content area is titled 'Client Working File Documents' and 'Electronic'. It contains 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 sections of requirements: 'Assurance files', 'Compilation and tax files', and 'Quality control'. Each section lists specific documents to be submitted. At the bottom, there is an 'Add File(s)' button.

Inspection Files Submission Notes:

Please submit **complete files (including final signed financial statements/financial information and all supporting documents)** for practice review.

If using CaseWare please provide a compressed/back up copy. If supporting documents etc are in a different format please use a ZIP folder for each client. *See some additional considerations to include with your electronic submission:*

Assurance and Compilation Files:

- Final signed financial statements/ financial information
- Signed letters and other communication with management and those charged with governance
 - *ie. engagement letters, representation letters, audit committee letters, etc.*
- All working papers and supporting documents, including checklists (if applicable)
 - *This should include all agreements and contracts that relate to amounts or disclosures in the financial statements/financial information, even if these agreements are several years old (i.e. banking/lender agreements, tax planning documents for preferred shares)*

Tax Files:

- Full copies of tax returns in **PDF Format** (*ie. T1/ T2 returns*)
- Supporting documents for the tax return
- Signed forms as applicable (*ie. T183s, T1135s, T1032s etc.*)
- Evidence of filing the tax return
- 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