

Post Designation Learning Frequently Asked Questions

1. How do I know if what I am doing qualifies for PDL credit?

PDL includes any subject matter that will contribute to the enhancement of your business and professional competency. It includes subjects other than professional accounting such as leadership, managing change, decision and problem solving, information technology, human resources, and financial management. You can pursue it in either a formal path such as an MBA or another university degree or professional designation or an informal path such as coursework, reading, research, volunteerism or formal instruction and writing.

2. Do I need someone to approve my PDL activity before I take a course or register for an event?

No, however if you are uncertain whether a particular course or learning event is going to give you valuable content, you can contact the Society.

3. If I am taking coursework with a final grade that goes beyond the 40 credit per year maximum for this category, do I get carry over my hours to the next year of PDL activity?

No, you will not be able to carry over hours from a course that exceeds the 40 credit per year maximum. While recognizing that some course offerings will entail more work than others, the banking of hours between years substantially defeats the purpose of maintaining an active PDL system.

4. I don't live or work in a major urban area and find it difficult to find relevant PDL activities. What options are available to me?

The Society is committed to assisting all members with gaining access to relevant PDL activities. You can complete your PDL requirements using reading and research or by taking distance-education courses from an accredited institution or professional association.

5. What volunteer roles qualify for PDL credit – am I restricted to serving as treasurer?

The Society encourages members to gain professionally relevant volunteer experience while actively contributing to their community agency of choice. This includes services as a board member, service in a

relevant leadership role (e.g. programs, special task force, lead coach or treasurer).

6. I am responsible for an instructional role within my organization, does this qualify for PDL credit.

Yes – the instructional role where one delivers instruction on a new financial , HR or strategic policy. Regular corporate meetings where one presents day-to-day business information does not qualify for PDL.

7. How will PDL activities be tracked on an annual and three year basis?

Beginning July 1, 2005, unless a CMA member qualifies for a PDL reduction or exemption, they will have considered to have entered their first 3 year PDL block running. Each CMA member will be expected to complete a minimum of 30 PDL credits in each year of the block achieving a minimum of 120 PDL credits at the end of the 3 year period.

8. What happens to the PDL requirement if I am taking maternity or paternity leave?

If you are on maternity or paternity leave from your current employer that qualifies under existing statues, then your minimum annual PDL requirements for that year only will be reduced by 50%. That means that your will be expected to complete a minimum of 15 PDL credits in the CMA member year that you had your child (running from July 1 to June 30 each year).

9. What records do I need to keep for verification purposes?

As deemed necessary, the Society may conduct random verification with individual CMA members to review their completion of the mandated PDL requirement. Substantiating records that should be maintained would include receipts or transcripts from courses, event programs, list of volunteer roles and copies of any instructional materials.