The Association of Professional Engineers and Geoscientists of Alberta

Professional Licensee Work Experience Record Guide

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Guide for completing the Professional Licensee Work Records

Using the Excel Forms

Please enter all required information into all applicable non-shaded cells on each form.

Do not attempt to alter or edit the forms in any way. As examples, do not change any of the formatting or page breaks on the forms, please do not re-name any of the tabs in the forms and please do not copy any of the records to add to a form. On Row 2 of each form for the current date, or for the end date of a current job, please do not enter the formula for "Today's Date". **Only enter the date in the format shown on the forms and then enter "Tab"**.

When describing your engineering or geoscience work in each form, (**Rows 22 onward in the Summary Form**, and **Rows 21 onwards in the DSOP Form**) **please type your information directly into the cell**. All text **must be visible in each cell**. The process of cut and paste from Word is not always advisable because any excess text will go over the end of the cell. It is advisable to have 3 or 4 lines of white space showing at the bottom of each page of the work details.

In order to begin a new line in an Excel cell (the "return" function), use **Alt Enter** on the keyboard.

For new applications: Both Work Records must be uploaded to your application in the **original Excel Format only.** Please **doublecheck all areas of the forms** before uploading them to your application. We will not be able to proceed with your application if the forms are not fully completed as instructed in this document.

For reassessments: Please follow the instructions provided by staff.

P.L. Work Record Requirements

https://www.apega.ca/apply/membership/professional-licensee
https://www.apega.ca/apply/membership/professional-licensee/work-experience

You are required to read all information on the above webpages and meet all specified requirements before you apply, to complete all sections of the work records according to the instructions in this guide, and to provide sufficient experience and sufficient acceptable references. If the minimum application requirements are not met, the application will be withdrawn. Note that refunds are not issued for withdrawn applications.

- **Defined Scope of Practice (DSOP) Form** – This form is only for submitting your proposed DSOP and details of the professional level work within the DSOP**.** You must submit a minimum of 2 years of professional level experience within the proposed DSOP and within the last 7 years, completed under the direct supervision and control of a P.Eng. or P.Geo. who was registered with APEGA during the supervised time period.

- **Work Experience Summary Form** – This form is for submitting all your professional level engineering or geoscience work experience with references, including professional level engineering or geoscience experience which may or may not be within the Defined Scope of Practice. You must submit a minimum of 6 years of professional level experience completed under the supervision and control of a P.Eng., P.Geo., P.L.(Eng.), or P.L.(Geo). **Note**: The Summary form should not be a duplicate of the DSOP form. This form is for a summary of your engineering or geoscience work experience for the applicable time period(s)/jobs and should be 3 to 5 paragraphs.

- Any **references** used on the DSOP Form must also be used for the same time period(s) on the Summary Form.

  Applicants are required to contact all references before submitting the work records to ensure that the contact information is current and to ensure that the references will be responding to APEGA's reference questionnaires**. After work records are finalized and reference questionnaires have been sent, the work records cannot be edited or revised, and additional references cannot be added.** APEGA encourages applicants to discuss their work experience with the references, to ensure that they support the application, prior to submitting

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Professional Level Work Experience

You must demonstrate professional level engineering or geoscience work for the minimum 2-year requirement of experience in the DSOP, and for the total 6-year experience requirement. This experience must be complex technical engineering or geoscience work, i.e., the practice of engineering or geoscience as defined in the EGP Act, and must include the following:

- The most important factor in the assessment of your work experience is the demonstration in the work experience documents of your professional application of engineering theory or geoscience theory.
- The application of relevant engineering or geoscience methodologies and problem solving that requires work beyond routine application of codes and standards.
- There should be evidence of the skillful application of engineering, geology or geophysical principles and practical experience. The applicant needs to show professional level technical competency and the ability to work as an independent practitioner. Acceptable experience may include selecting solutions and solving problems, preparing and checking engineering designs or interpretations, showing evidence of sound technical judgment and practices, demonstrating familiarity with the use and application of pertinent technologies, procedures, systems and programs
- Acceptable experience may also include the collection and analysis of information and data. However, data collection and analysis should not be the major component of the experience for a significant period of time.

Unacceptable experience may include:

- Roles that have no engineering or geoscience content.
- **Technologist/Technician Experience:** Basic duties including preparation of plans, designs, plots, calculations, cost or analysis in accordance with established procedures, codes, standards, drawings or specifications if such codes or standards do not call for the involvement of a professional engineer or professional geoscientist.

  Routine surveys or inspections and preparing routine reports.

  Decisions that are of a routine nature, usually based on clearly defined procedures, codes and standards, drawings or specifications.

  Duties assigned with narrow parameters.

  Those areas of construction management, project controls, supply chain management and sales that do not demonstrate sufficient professional level application of theory.

  Aspects of work experience such as routine testing, routine maintenance, construction, routine assembly, project management, or project coordination are not normally considered a demonstration of the application of engineering theory at a professional level.

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Defined Scope of Practice (DSOP) Form:

On the DSOP Form you will submit your proposed scope and details of your work within that scope. Please tab through and fully complete each applicable non-shaded area on the DSOP Form. **For examples of the wording of APEGA scopes, please refer to the Scope Samples List**. **Your proposed DSOP must be limited in exactly the same manner as the Scope Samples**. Note that all information entered on Record 1 on Rows 2 through 13 (your name, APEGA number #, date, and all DSOP entries) will intentionally auto populate on the remaining records**.**

Entering a proposed Defined Scope of Practice(DSOP):

A DSOP is a specific limited scope of work and can only include professional level engineering or geoscience work **which uses the application of engineering theory or geoscience theory. For every Row described below, please refer to the Scope Samples List for examples**. A P.L. can only have one DSOP, only in one discipline.

- **Row 5, Discipline:** Please choose your discipline from the drop-down menu. Your scope of practice must be in one of the disciplines that is on the list, and it can only be in one discipline.
  Special Note for instrumentation applicants: The Instrumentation Engineering discipline is not included in the APEGA engineering syllabus. If your practice is instrumentation, you would choose the discipline that best applies to you (usually this is Electrical, and sometimes Mechanical or Industrial), and then you would enter "Instrumentation", or "Instrumentation and Controls" as your Field of Practice.

- **Row 5, Field of Practice**: This is the industry or area within which you practice engineering or geoscience. The Field of Practice cannot include the word "engineering" or "geoscience" and cannot include any of the engineering tasks that are in the dropdowns in the Engineering Task area.

- **Row 7 – 9, Engineering/Geoscience Tasks:** Please choose the engineering or geoscience tasks from the drop-down list. Although there are a total of nine engineering/geoscience tasks acceptable as per the EGP Act, choose from the dropdown only those tasks which directly apply to the items that are entered on Row 10, and for which you use the application of engineering or geoscience theory in the work. When entering the engineering or geoscience tasks, please ensure that you proceed in the numerical order that they are listed on the form from left to right.

- **Row 10, Structure, Work or Process:** This area is for the **list** of items to which the engineering or geoscience tasks apply (the body of the scope). For example, if your engineering tasks are "Designing", "Reporting on" and "Preparing plans and specifications for", the Row 10 section would answer the question of "What" "items" do you design, report on and prepare plans and specifications for. You would list these items on Row 10. Items must be **specific and must include qualifiers** such as temperature limitations, pressure limitations, voltage limitations, facility types, building types and building heights, wherever applicable. Please refer to the **Scope Samples List** for examples. Do not capitalize each word on Row 10, instead enter all text on Row 10 in **lower case** with the exception of acronyms (e.g., SCADA) or voltages, temps, etc. (e.g., kV, F).

- **Do not enter any of the following** on Row 10:

  - Discipline or engineering tasks (i.e., none of the items already entered)
  - the word "engineering". **"Engineering" is only used in the discipline area**.
  - general terms such as "projects", "engineering/geoscience work", "management", "equipment"
  - job descriptions or technical details
  - terms like "including", "such as", "for example"
  - specific codes or standards, or any references to codes/standards
  - items for which there is no application of engineering or geoscience theory in the work
  - bracketed items - **brackets are only used for indicating limitations such as pressure, temperature, voltage**. Please refer to the **Scope Samples List** for examples.

- **Row 12/13, Exclusions:** Exclusions are not required. However, if there are items/tasks which could be implied by your proposed scope but are not part of your work, you would enter them as exclusions.

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DSOP Form: Row 15 – 20, Company Information and References

- Please tab through and fully complete each non-shaded area on the record. Beginning with Work Record 1, the experience must be presented in **reverse chronological order**.

- A separate record is required for each time period for which you worked within the proposed scope under the supervision and control of a P.Eng. or P.Geo. who was an active APEGA member at the time of the supervision.

- Only enter time periods for which you worked within the scope within the last 7 years. **Exception: If your most recent job for which you are claiming DSOP experience goes back more than 7 years, you would enter the entire time period; do not add any other jobs that are more than 7 years ago.**

- Only enter time periods for which you worked within the scope under the supervision and control of a P.Eng. or P.Geo. who was an active APEGA member **at the time of the supervision**. **Do not enter any companies or time periods on the DSOP Form for which you do not have this type of reference**.

- For each record, the reference provided **must have had direct supervision and control of your work** within the DSOP for the exact time period that is entered on the record, and the reference must have been a P.Eng. or P.Geo. who was actively registered in Alberta during all or some of the time period referenced. (Total time referenced by active P.Eng. or P.Geo individuals must be a minimum of two years.)

- If you are providing more than one P.Eng. or P.Geo. reference for the same company/time period, please duplicate all information on an additional record and supply the additional reference information on that record.

- For all experience entered on the DSOP Form, you are required to supply **sufficient** P.Eng. or P.Geo. references, under whose supervision and control you worked within the scope. The minimum number of references required for the DSOP Form is one. (i.e., if one acceptable reference covers two or more years of work in the DSOP Form, that is sufficient in this form). Any references used on the DSOP form **must also be entered on the Summary Form for the same time period**.

DSOP Form: Row 21 onwards, Details of the engineering or geoscience work:

It is up to the applicant to provide sufficient details demonstrating the application of professional level engineering or geoscience theory in all parts of the DSOP.

The details section is the main section that is reviewed by the APEGA Board of Examiners to assess whether an applicant's work is professional level engineering or geoscience work within the scope and whether it is work that demonstrates the application of engineering or geoscience theory. If there are insufficient details showing how an applicant uses engineering or geoscience theory to perform **each item in the proposed scope**, the scope will not be approved. Instead, the proposed scope could be revised with further limitations, or the application could be refused.

You are required to demonstrate a minimum of 2 years of professional level engineering or geoscience work **for every item** within the proposed Defined Scope of Practice.

Your details must clearly demonstrate how you use engineering theory **for every item in the scope**.

Details must all be in the first person and directly state that you performed the work in the scope.

Please use the first person "I" in all sentences in the details section where you are describing your work.

The details section should only refer to the DSOP items. Please do not enter any engineering work which is not part of the DSOP items. A general summary of your overall engineering work will be entered instead on the Summary Form (please see Pages 8 and 9 of this document).

DSOP Form: Row 21 onwards, Details section, Cont'd

Exact formatting of work details:

A complete sample of an outline for writing the details follows on the next page (Page 7). The details section must be completed **exactly as is presented on Page 7 of this Guide**.

Note that if the details are not written exactly as is instructed on Page 7, the DSOP Form will not be accepted, and we will be unable to proceed with your application.

Examples of ways to demonstrate the use of engineering theory when writing the details:

Examples of wording:

I designed X by the following steps and types of calculations/formulas.
I designed X by doing Y type of calculation to determine Z.
I evaluated Y systems by the following steps.

It is required that details are written using the first person, i.e.., consistently using direct "I" statements wherever possible.

You are required to refer to the types of engineering or geoscience theory used to perform the work. In the details you would refer to specific steps, formulas, types of calculations, etc., but you would **not** show the actual calculations or formulas. You must provide specific examples of projects showing work done meeting any of the qualifiers, such as temperature limitations, pressure limitations, voltage limitations, facility types, building types and building heights mentioned in the structure, work or process section. A projects list can be included for each of the records at the end of the work details you enter (Row 21 onwards).

There are 5 total pages provided to write the details for each Excel DSOP form. Please type your information directly onto the form. Full details are required for each record that you are submitting on the DSOP Form, and usually these details would be identical on each record, since they are describing the same scope of work.

All text must be visible within each page of the details section in the Excel version of the document. Please ensure that your details fit on each page. In order that this is consistent with different computer views, on each details page please leave 2 or 3 blank lines at the end.

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SAMPLE OF ENTERING A DSOP AND INSTRUCTIONS FOR ENTERING THE DETAILS OF THE WORK

In the discipline of:	**Mechanical Engineering**		In the field of:	**Building Systems**	
Eng Task 1	**Designing**	Eng Task 2	**Preparing plans and specifications for**	Eng Task 3	**Advising on**
Eng Task 4	**Directing the construction of**	Eng Task 5		Eng Task 6	
Eng Task 7		Eng Task 8		Eng Task 9	
Structure, Work, or Process		**HVAC (heating, ventilation, and air conditioning) systems, hot water boiler systems, and plumbing systems for residential, commercial, and institutional buildings.**			
Exclusions		**Chiller, direct digital control, sprinkler and steam systems**			

DETAILS OF THE TECHNICAL ENGINEERING WORK clearly demonstrating the application of professional level engineering theory for each engineering task in the DSOP
Note: For the "return" function (to begin a new line in an Excel cell), use "Alt" "Enter" on the keyboard.

The details must be stated exactly as follows below and must exactly match the engineering tasks and items on Line 10.

Each engineering task, in order, is described separately with regards to each item in the scope.

The first eng task is used with the first item from Line 10, then the 2nd eng task is used with the first item from Line 10, then the 3rd eng task is used with the first item from Line 10, and then the last eng task is used with the first item from LIne 10. This is then repeated in exactly the same manner with the next items from Line 10. In the example below, the items from Line 10 are: HVAC systems, hot water boiler systems, and plumbing systems.

State exactly as follows: I **design HVAC systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to completely design HVAC systems from start to finish.

State exactly as follows: **I prepare plans and specifications for HVAC systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to prepare plans and specifications for HVAC systems.

State exactly as follows: I **advise on HVAC systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to advise on HVAC systems.

State exactly as follows: I **direct the construction of HVAC systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to direct the construction of complete HVAC systems.

State exactly as follows: **I design hot water boiler systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to completely design hot water boiler systems from start to finish.

State exactly as follows: **I prepare plans and specifications for hot water boiler systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to prepare plans and specifications for hot water boiler systems.

State exactly as follows: **I advise on hot water boiler systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to advise on hot water boiler systems.

State exactly as follows: **I direct the construction of hot water boiler systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to direct the construction of complete hot water boiler systems.

State exactly as follows: **I design plumbing systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to completely design plumbing systems from start to finish.

State exactly as follows: **I prepare plans and specifications for plumbing systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to prepare plans and specifications for plumbing systems.

State exactly as follows: **I advise on plumbing systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to advise on plumbing systems.

State exactly as follows: **I direct the construction of plumbing systems** for residential, commercial, and institutional buildings as follows:

-- Then you would show how you use engineering theory to direct the construction of complete plumbing systems.

The details for each page must all be visible within the cell in the Excel version of this document. To move to a next page, enter Tab.

NOTE: The colour, bold, and underline formatting is only used in this form for instruction purposes. Please do not colour, bold or underline any text on your form.

On each Record there are 5 pages available for the details. Please leave 2 or 3 blank spaces at the end of each page used.

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Work Experience Summary Record:

On the Work Experience Summary Record, you will submit your total years of professional level experience and provide references.

You are required to submit a **minimum of 6 years of professional level experience**. This experience must have been completed under the direct supervision and control of a P.Eng., P.L.(Eng.), P.Geo. or P.L.(Geo.) who was actively registered during the time of the supervision.

For work experience outside of Canada, practitioners in engineering or geoscience can be acceptable references if they had direct supervision and control of the work. Note that these references will be asked to provide their credentials. To be considered a practitioner, the reference must have an undergraduate degree in engineering or geoscience with at least 4 years of related experience.

Although a minimum of 6 years of experience is required, applicants are encouraged to submit all their professional level experience for which the required type of references are available.

- Please tab through and fully complete each non-shaded area on the record. Beginning with Work Record 1, the experience must be presented in **reverse chronological order**.

- **A separate work record** is to be used for each job or each major position change in a job which involved a significant change in duties.

- There are 10 work records available in the form. Note that your name, APEGA Member # and date that you enter on Work Record 1 will auto populate on the remaining records.

- For each record, the reference provided must have had direct supervision and control of your work for the exact time period that is entered on the record, and the reference must have been a P.Eng., P.L.(Eng), P.Geo., P.L.(Geo) or equivalent practitioner (only for work outside of Canada) during all or some of the time period entered (total appropriately referenced time must be at least 6 years). If the references time overlap, that is fine. In addition, if you provide two or more references for the same time period or overlapping time periods, you will need to enter 2 work records, one for each reference. You need a separate record for each reference.

- There should be **no major gaps** between time periods. Any gaps, such as maternity leave, miscellaneous leave, unemployment, or non-engineering/non-geoscience work, would be entered on a record, with areas such as company information, reference information, and work details noted as non-applicable.

- **"Company"** must be the company by which you are directly employed. If your work was contract work to another company, add "—contracted to xyz" directly after your Company name.

- If you are the company owner, in "**Job Title**", you must state: "Owner." If you also have a specific job title, you would add the job title directly after "Owner".

- If all or most of the work for a time period was technologist level, you would still enter a record with applicable Company, Time Period, Job Title etc., but please do not enter any reference information and instead of a work description, note in the work description area (Row 21) that the work was all or primarily technologist level. Reference questionnaires are not sent for all or primarily technologist level work records.

- Please do not provide any references who did not supervised and controlled the work, unless you already have at least one P.Eng., P.L.(Eng), P.Geo., P.L.(Geo) or equivalent practitioner (only for work outside of Canada), who supervised and controlled the work for the required 6 years, and you need extra reference(s) to meet the minimum reference number (3).

Work Experience Summary Record Cont'd

- **Do not enter any pre-graduate experience**. Work experience is only credited after the date of graduation.

- In the **Description of Engineering or Geoscience Work** section on each Work Summary Record, please enter a complete summary of your professional level work experience. For each work record, please enter your roles, responsibilities, and types of engineering or geoscience activities that you performed for each role. This record should be a **summary** of the types of technical theory used and practical engineering or geoscience experience and can include information such as an overview as to how and where you personally applied engineering theory through design, design review, analysis, or problem solving in your work.

  If a portion of the time period was professional level work and a portion was technologist or technician level, please provide the number of months of each, and provide a summary of each type in the applicable area for each on the record. The total number of months (professional work plus technologist/technician work) must meet the total months claimed on the record.

References requirements- Summary Form:

- A minimum of **three** references is required.

- The minimum six years of acceptable professional-level experience must have been completed under the direct supervision and control of at least one P.Eng., P.Geo., P.L.(Eng.), or P.L.(Geo.):

  - For work in Canada, a minimum of six (6) years of acceptable professional level experience must be referenced by at least one Professional Member or Professional Licensee who had direct supervision and control for the work. The other references do not need to be Professional Members but must have direct knowledge of the applicant's work.

  - If the reference is a P.L., their area of practice must be in a comparable area of practice as the defined scope of practice (DSOP) proposed by the applicant.

  - For work performed outside of Canada, equivalent Practitioners in engineering or geoscience may be considered as acceptable references as long as they had direct supervision and control of the applicant's work. To be considered a practitioner, the reference must have an undergraduate degree in engineering or geoscience with at least 4 years of related experience.

  - Practitioners will be asked to provide their credentials. References for work performed outside of Canada from practitioners who do not have an undergraduate degree in engineering or geoscience will not be accepted.

  - If Professional Members references who supervised and controlled the work are available, it is recommended that these references are provided.

  - Family members and relatives are normally not allowed as references.

  - The acceptability of the references will be determined by the BOE (Board of Examiners).