

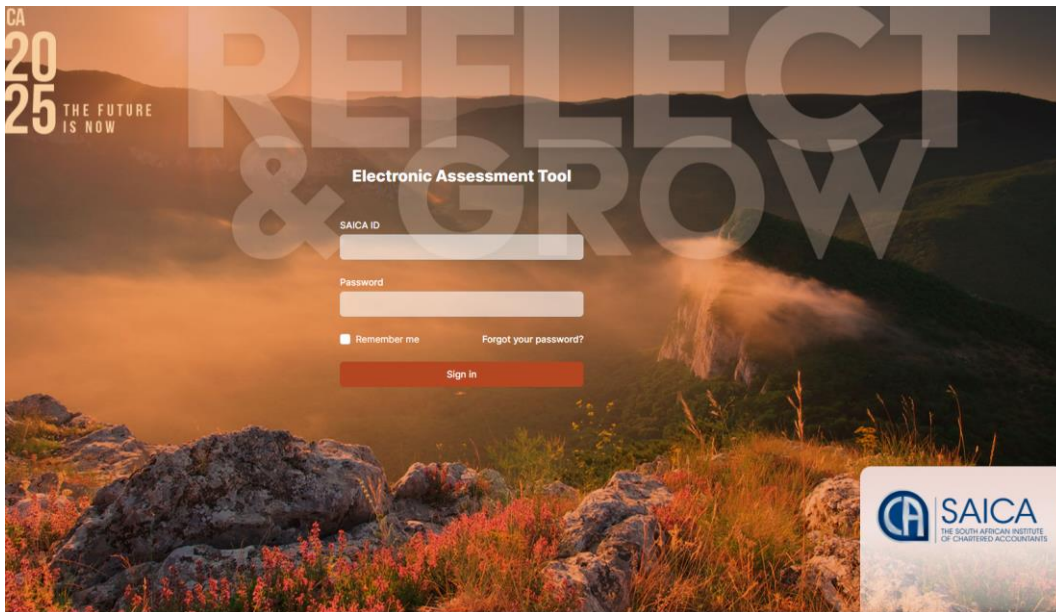


CA2025 TRAINING PROGRAMME

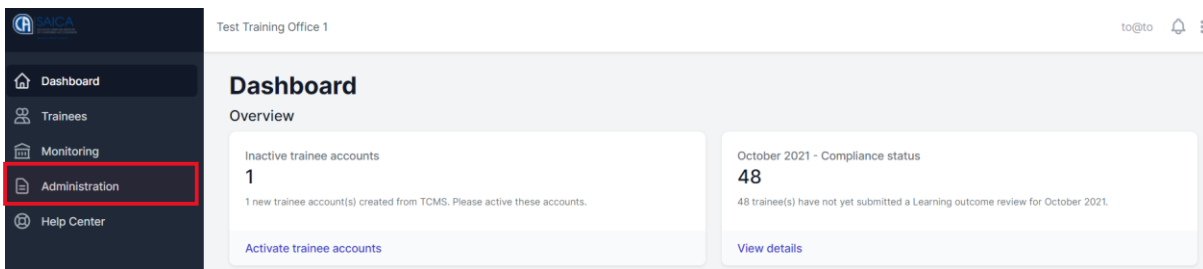
Electronic Assessment Tool

Creating & Importing Training Plan

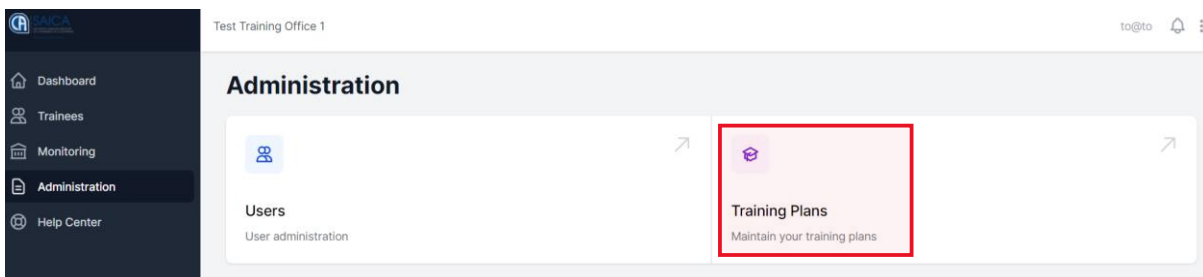
Please login to the Electronic Assessment Tool using your 8-digit “SAICA ID” followed by your password.



Select “Administration tab”



Click on “Training Plans”



Click on “New training plan”

Test Training Office 1

Administration > Training plans

Training plans

Active Archived

NAME	PDS DETAILS	STATUS
3 year plan	6 periods 6 months per period	Active Trainees: 24
4 year plan	12 periods 4 months per period	Active Trainees: 2
5 year plan	20 periods 3 months per period	Active Trainees: 21
Graeme Test	6 periods 6 months per period	Active Trainees: 1
Graeme Test 2	6 periods 6 months per period	Active Trainees: 0
Tonia Lunga Test	6 periods 6 months per period	Active Trainees: 2

Help

Fill in the required fields listed below.

Test Training Office 1

Administration > Training plans > Create training plan

Create a new Training Plan

The fields listed below are required to create a new training plan.

Name (Example: Default 3 year plan)

PDS period duration 3 Months 4 Months 6 Months

Number PDS periods in this training plan

Training contract length (Years)

Cancel Save

Once all required fields have been filled in, please click "save"

Test Training Office 1

Administration > Training plans > Create training plan

Create a new Training Plan

The fields listed below are required to create a new training plan.

Name (Example: Default 3 year plan)

PDS period duration

Number PDS periods in this training plan

Training contract length (Years)

Please note that a Training Plan must be 3, 4 or 5 years in length.

Number PDS periods in this training plan

Training contract length (Years)

A Training Plan must be 3, 4 or 5 years in length.

A message will appear on the top right-hand side of the screen, notifying you that a new training plan has been created.

Test Training Office 1

Administration > Training plans > View training plan

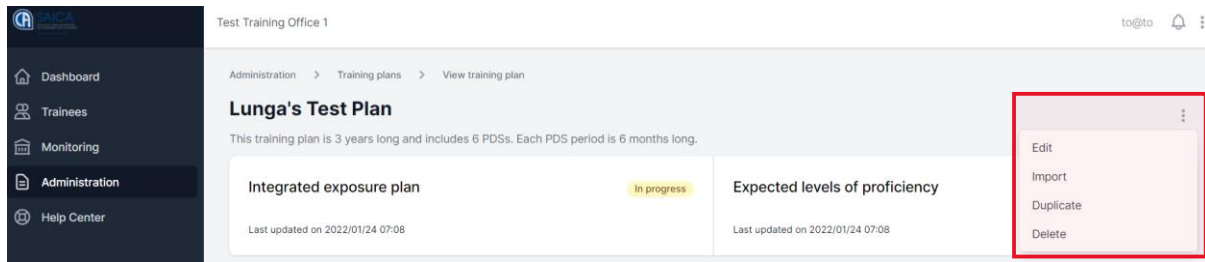
Lunga's Test Plan

This training plan is 3 years long and includes 6 PDSs. Each PDS period is 6 months long.

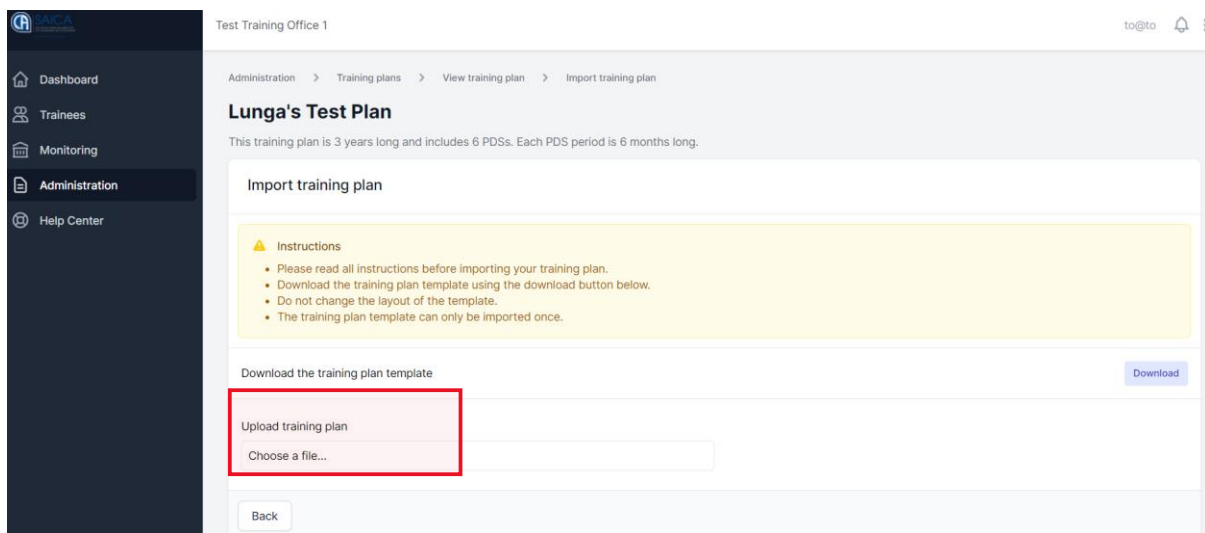
New training plan created!

Integrated exposure plan In progress	Expected levels of proficiency In progress
Last updated on 2022/01/24 07:08	Last updated on 2022/01/24 07:08

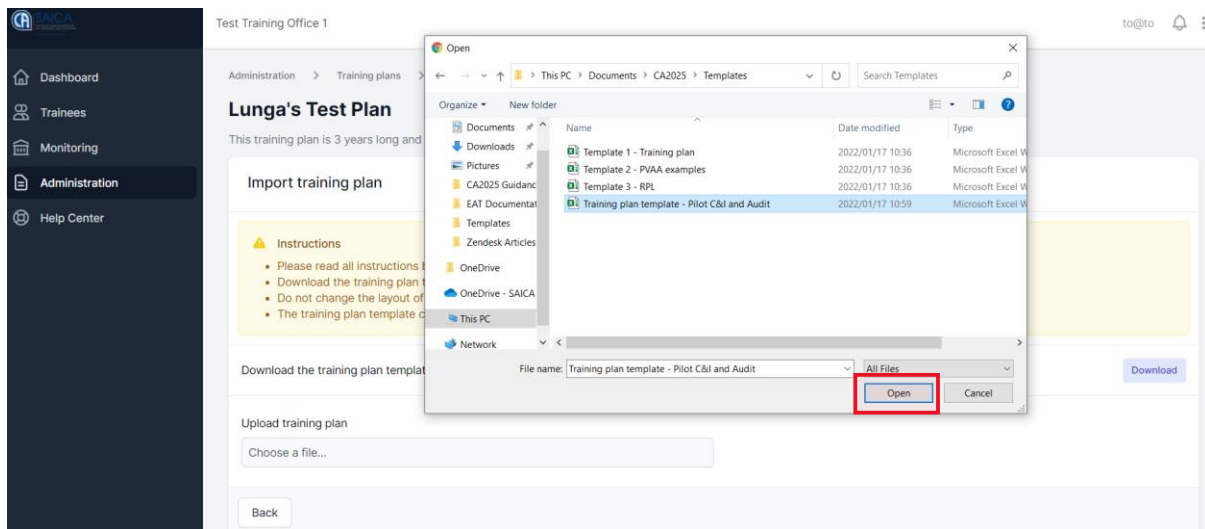
To Import training plan template. Please select 3 dots on the top right-hand side of the screen and select “Import”.



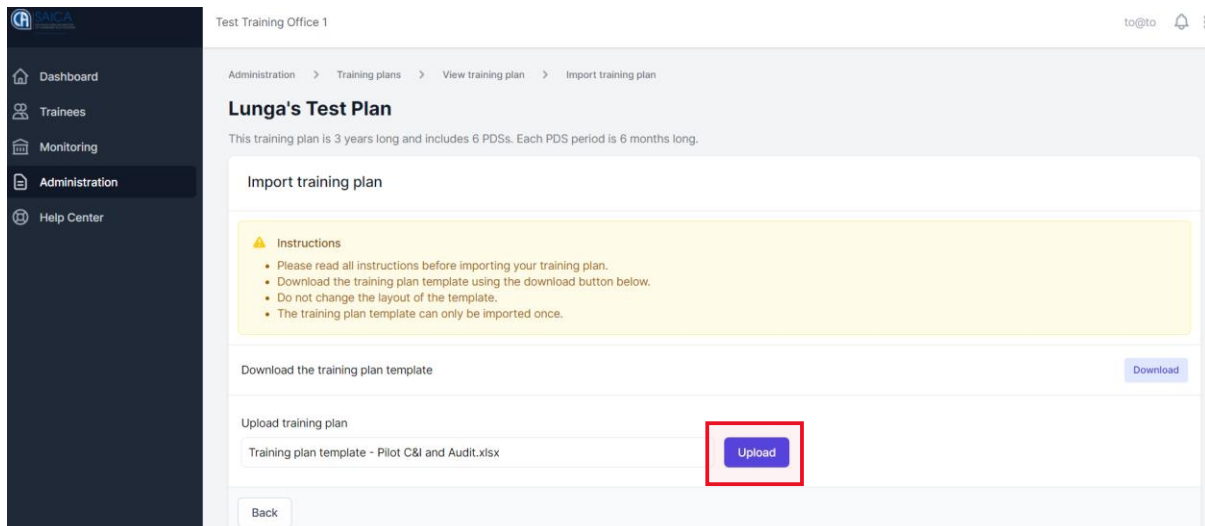
Select “Upload training plan” and navigate to where training plan template is saved.



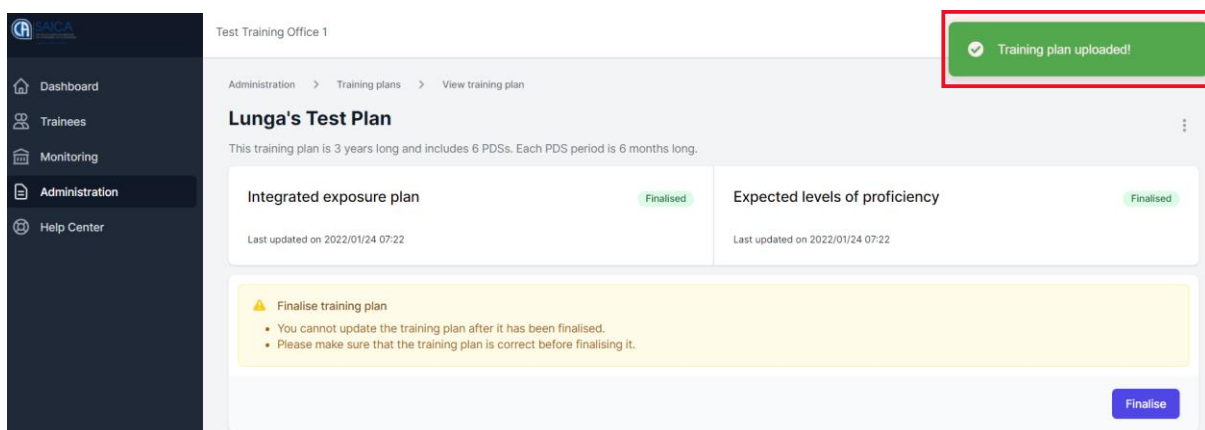
Browse to location where training plan template is saved and click “open”.



Select “Upload” to ensure that training plan template is uploaded successfully.



A message will appear on the top right-hand side of the screen, notifying you that a new training plan has been uploaded.



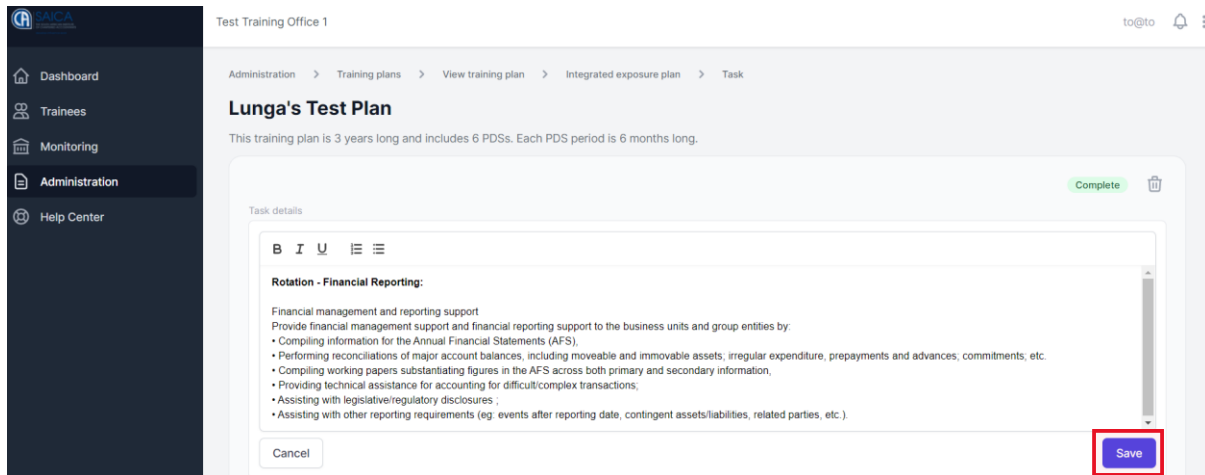
Select task to ensure you are able to amend task font, bullets or task details.

The screenshot shows the SAICA system interface. On the left is a dark sidebar with navigation options: Dashboard, Trainees, Monitoring, Administration, and Help Center. The main content area is titled 'Test Training Office 1' and 'Lunga's Test Plan'. Below the title, it states 'This training plan is 3 years long and includes 6 PDSs. Each PDS period is 6 months long.' The 'Integrated Exposure Plan' section is highlighted with a red box. It contains a list of tasks, with the first task '1. Rotation - Financial Reporting' selected. The task description is: 'Financial management and reporting support Provide financial management support and financial reporting support to the business units and group entities by: • Compiling information for the Annual Financial Statements (AFS), • Performing reconciliations of major account balances, including moveable and immovable assets; irregular expenditure, prepayments and advances; commitments; etc. • Compiling working papers substantiating figures in the AFS across both primary and secondary information, • Providing technical assistance for accounting for difficult/complex transactions; • Assisting with legislative/regulatory disclosures ; • Assisting with other reporting requirements (eg: events after reporting date, contingent assets/liabilities, related parties, etc.).' Below the task description, there are progress indicators: 'Inputs 1', 'Business activities 5', and 'Outputs leading to outcomes 2'. A 'Complete' button is visible in the top right of the task area. A blue 'Add a Task +' button is located below the task list. A 'Help' button is in the bottom right corner.

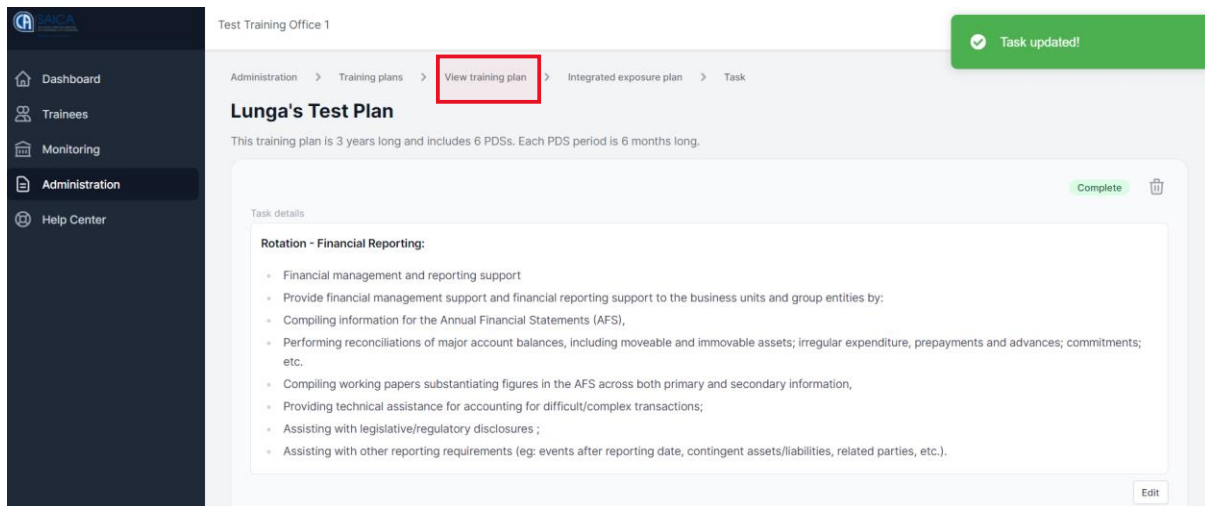
Select "Edit" to ensure you are able to amend task font, bullets or task details.

The screenshot shows the SAICA system interface. On the left is a dark sidebar with navigation options: Dashboard, Trainees, Monitoring, Administration, and Help Center. The main content area is titled 'Test Training Office 1' and 'Lunga's Test Plan'. Below the title, it states 'This training plan is 3 years long and includes 6 PDSs. Each PDS period is 6 months long.' The 'Task details' section is highlighted with a red box. It contains the same task description as in the previous screenshot: 'Rotation - Financial Reporting: Financial management and reporting support Provide financial management support and financial reporting support to the business units and group entities by: • Compiling information for the Annual Financial Statements (AFS), • Performing reconciliations of major account balances, including moveable and immovable assets; irregular expenditure, prepayments and advances; commitments; etc. • Compiling working papers substantiating figures in the AFS across both primary and secondary information, • Providing technical assistance for accounting for difficult/complex transactions; • Assisting with legislative/regulatory disclosures ; • Assisting with other reporting requirements (eg: events after reporting date, contingent assets/liabilities, related parties, etc.).' Below the task description, there is a section for 'Map technical competency learning outcomes to the task' with a dropdown menu set to 'Select learning outcomes from SAICA Competency Framework'. Below that, there is a section for 'Expected exposure to learning outcomes' with a list of items: 'A2 - Business strategy' and '3 - Implementing strategy'. A 'Complete' button is visible in the top right of the task area. A red box highlights the 'Edit' button in the bottom right corner of the task details section.

Click on “Save” to ensure any amendments to the task saved.



Return to “View training plan” screen when all tasks have been edited successfully.



Click on “Finalise” to ensure that the training plan is finalised and has been uploaded successfully.

