

# CA2025 TRAINING PROGRAMME

# **Electronic Assessment Tool**

# Creating a Professional Development Summary (PDS)

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



### Select "Create PDS" on the dashboard.

SAICA	Test Training Office	gladislubowitz@test1	trainingoffice.co.za 🗘
습 Dashboard	Dashboard		
C Assessment	Overview		
Training Plan	Expected levels of proficiency Integrated exposure plan 0 / 9 0 / 6		
Reports	Excitive BDS cycle: Exposures required for this PDS cycle:		
(2) Help Center	O activened     O activened     O activened     O activened     O activened     O activened     O accumented in previous PDS cycles     O accumented in previous PDS cycles		
	View details View details		
	Learning Outcome Reviews in progress	Create LOR	
	STATUS DETAILS		
	No Learning Outcome Reviews		
	Professional Development Summaries in progress	Create PDS	
	STATUS DETAILS		
	No Professional Development Summaries		

## Or alternatively select "Assessment" then "Create PDS"

SAICA	Test Training Office	carrolsporer@testtr	ainingoffice.co.za
습 Dashboard	Assessment Instruments		
C Assessment	Learning Outcome Reviews Professional Development Summaries		
🗍 Training Plan			
III Reports	Create PDS +	All roles 🗸 🗸	
Help Center	SUBMITTED TRAINEE DETAILS STATUS		
	No Professional Development Summaries		

Create Professio Get started by filling i	nal Development Summar	ry your new Professional Development Summary.						
Learning outcome revie	ews that will be linked to this PDS	:						
Jan-22	No LOR's submi	tted in this period						
Feb-22	No LOR's submit	No LOR's submitted in this period						
Mar-22	No LOR's submi	No LOR's submitted in this period						
Apr-22	No LOR's submitted in this period							
May-22	<ul> <li>No LOR's submit</li> </ul>	tted in this period						
Jun-22	<ul> <li>No LOR's submi</li> </ul>	tted in this period						
Evaluator		Type to search a user						
Assessor		Type to search a user						
Period start date		2022-01-01						
Period end date		2022-06-30						
Cancel			Save					

## Fill in the required fields listed below and select "Save"

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

Create Professional Development Summary Get started by filling in the information below to create your new Professional Development Summary.							
Learning outcome reviews that	t will be linked to this PDS:						
Jan-22	No LOR's submittee	d in this period					
Feb-22	No LOR's submitted	d in this period					
Mar-22	No LOR's submitted	d in this period					
Apr-22	<ul> <li>No LOR's submittee</li> </ul>	d in this period					
May-22	<ul> <li>No LOR's submittee</li> </ul>	d in this period					
Jun-22	<ul> <li>No LOR's submittee</li> </ul>	d in this period					
Evaluator		Cherri Mohr (cherrimohr@testtrainingoffice.co.za) +					
Assessor		Mercy O'Conner (connermercyo@testtrainingoffice.co.za) ~					
Period start date		2022-01-01					
Period end date		2022-06-30					
Cancel		Save					

Please provides reasons or comments on non-compliance or issues they may have experienced regarding finalizing LORs, then click "**Save**"

Professional Development Summary								
Period: 2022-01-01 to 202 PDS Period: 1	Period: 2022-01-01 to 2022-06-30 DIS Period: 1							
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude			
Feedback summary A summary of LORs submitted and f	feedback received during the curre	ent PDS cycle.			Initiated			
Feedback summary table								
Jan-22	No LOR's submitted	in this period						
Feb-22  No LOR's submitted in this period								
Mar-22	<ul> <li>No LOR's submitted</li> </ul>	in this period						
Apr-22	<ul> <li>No LOR's submitted</li> </ul>	in this period						
May-22	<ul> <li>No LOR's submitted</li> </ul>	in this period						
Jun-22	⊗ No LOR's submitted	in this period						
	_	Trai	nee					
Trainee comments Trainee provides reasons or comme issues they may have experienced r	Trainee comments Trainee provides reasons or comments on non-compliance or Issues they may have experienced regarding finalising LORs.							
		Evalu	ator					
Evaluator comments Evaluator comments on the trainee's	s comments or reasons above.	-						
Assessor								
Assessor comments		-						
Assessor comments on the trainee's reasons as required.	Assessor comments on the trainee's and evaluator's comments or reasons as required.							
Save								

Once "Save" has been selected, the below message will appear notifying you that changes have been submitted.



Fill in the below field, Trainees need to reflect on Academic progress and any support required. Then click on "**Save**"

Professional Development Summary						
Period: 2022-01-01 to 202 PDS Period: 1	22-06-30				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner	
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude	
Academic record Academic progress and assistance r	required.				Initiated	
		Train	ee			
SAICA accredited qualifica	ation	×				
Trainee indicates if they have a SAIC degree/bridging/postgraduate qualit the training contract. If yes, this sec	CA accredited fication at the point of entry to tion is optional.					
Academic progress					]	
If relevant, the trainee documents th progress during this PDS period. Th as test results to date (where applic studies and the status of your studi pass or not?). In the case of aspect unsatisfactory progress (poor test s on studies or reduced chances of su should describe in detail how they p areas.	he state of their academic is should include details such cable), weekly time spent on es (is the trainee on track to s of this record that point to cores, insufficient time spent uccess in exams), the trainee plan to address those problem					
Support						
Trainee has an opportunity to indica may be required regarding their aca	ate if any support from the TO ademic progress.					
					1	
		Evalua	ator			
Evaluator feedback		-				
Evaluator provides feedback as requestion provided by TO.	uired including support					
		Asses	sor			
Assessor feedback		-				
Assessor provides feedback as requ	uired.					
					Save	

Drill down to see technical competencies expected.

Professional Develo	pment Summ	nary		Not y	et submitte	d for evaluatio	in i
Period: 2022-01-01 to 2022-0 PDS Period: 1	06-30				Trai Eva Ass	inee: Pam Gr Iuator: Cherr essor: Mercy	een i Mohr / O'Conner
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan		Conclu	de
Technical experience Technical experience captured in the LOI development of the PVAA learning outco	Rs compared to planned ex mes.	perience per the training plan and a	reflection on Core hours, to facilitate (	reflection on the range and de	pth of expo	sure and the i	Initiated mpact on
xposure to technical competencies	5						
Inputs					Expected	Exposed	Total
A1 - Governance model					0	0	0
A2 - Business strategy							
1 - Strategy development pro	ocess				0	0	0
2 - External and internal influ	ences on the organisation!	s strategy			0	0	0
3 - Implementing strategy							
a) Review context releva	ant models to appraise the	organisation's capabilities to achieve	the business strategy and purpose		0	0	0
<ul> <li>b) Identify and evaluate internal environments</li> </ul>	significant business risk:	s, strengths, weaknesses, opportur	nities and threats associated with th	ne organisation's external and	0	0	0
c) Prepare a strategic re	sponse to the organisation	's competitive environment by apply	ing strategic analysis tools to identifie	d external and internal factors	0	0	0
d) Assess the risk tolera	nce of the entity's stakehol	lders' and its balance with opportuni	ty		0	0	0
e) Identify priorities and	actions either to mitigate o	critical risks or capitalise on opportur	nities		1	0	0
f) Formulate insights int	o future opportunities and	risks			0	0	0
4 - IT and data strategy					0	0	0
A3 - Aligning the business model	with the business strategy	/			1	0	0
A4 - Finance strategy					0	0	0
A5 - Tax strategy					0	0	0
Business Activities				Expe	cted 3 E	Exposed O	Total 0
				F		Surgered 0	Total 0

Trainee must fill in below field and reflect on the range and depth of exposure in the technical competencies compared to the IEP and/or the impact on opportunities to develop/demonstrate the PVAAs, and capture core hours in as much detail as required by the training office policy.

Professional Dev	elopment Summa	ary		Not y	at submitted for evaluation
Period: 2022-01-01 to 20 PDS Period: 1	22-06-30				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude
Technical experience Technical experience captured in the development of the PVAA learning	he LORs compared to planned expe outcomes.	rience per the training plan and a r	eflection on Core hours, to facilitate	e reflection on the range and de	Initiated pth of exposure and the impact on
Exposure to technical compete	encies				
Inputs				Expec	tted 2 Exposed 0 Total 0
Business Activities				Expec	tted 3 Exposed 0 Total 0
Outputs leading to outcomes				Exped	tted 6 Exposed 0 Total 0
		Trai	nee		
Trainee comments					
Trainee reflects on range and deptl compared to the IEP and the impac develop/demonstrate the PVAAs.	h of exposure to the TC it on opportunities to				
Core hours Enter Core Hours completed in the A - Strategy and governance t	current PDS cycle. The Cumulative	hours will calculate automatically	when you save.	EXPOSURE DURING PDS PERIOD	CUMULATIVE EXPOSURE
B - Stewardship of capitals: bu	usiness processes and risk ma	nagement		0,0	0.0
C - Decision-making to increase	se, decrease or transform cap	itals		0,0	0.0
D - Reporting on value creatio	n			0,0	0.0
E - Compliance				0,0	0.0
F - Assurance and related serv	vices			0,0	0.0
Total core hours is less than re	equired for a PDS period on yo	ur training plan. Please reviev	vyour hours.	0.00	0.00
		Evalu	uator		
Evaluator comments	's comments or reasons above	-			
		Asse	essor		
Assessor comments Assessor comments on the trainee reasons as required.	's and evaluator's comments or	-			
					_
					Save

Once all required fields have been filled in, please click "save" then proceed to "Proficiency in PVAA's" tab.

Professional Development Summ	ary		Not yet si	ubmitted for evaluation
Period: 2022-01-01 to 2022-06-30 PDS Period: 1				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner
Feedback summary Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude
Technical experience Technical experience captured in the LORs compared to planned exp development of the PVAA learning outcomes.	erience per the training plan and a r	reflection on Core hours, to facilitate	reflection on the range and depth	Submitted of exposure and the impact on
Inputs			Expected	2 Exposed 0 Total 0
Business Activities			Expected	3 Exposed 0 Total 0
Outputs leading to outcomes			Expected	6 Exposed 0 Total 0
	Trai	inee		
Frainee comments Irainee reflects on range and depth of exposure to the TC compared to the IEP and the impact on opportunities to develop/demonstrate the PVAAs.	I had spells away from work achieve the PVAAs for the p From the technical work ac	k that would have given me the period. :tually undertaken, happy with c	opportunity to get the expect	ed exposure so as to
Core hours inter Core Hours completed in the current PDS cycle. The Cumulativ	ve hours will calculate automatically 1	when you save.	EXPOSURE DURING PDS PERIOD	CUMULATIVE EXPOSURE
A - Strategy and governance to create sustainable value			10,0	10.0
8 - Stewardship of capitals: business processes and risk m	anagement		20,0	20.0
<ul> <li>Decision-making to increase, decrease or transform ca</li> <li>Deporting on value graption</li> </ul>	pitais		15,0	15.0
			3,0	3.0
			0,0	0.0
- Assurance and related services			50.00	50.00
Fotal core hours is less than required for a PDS period on y	our training plan. Please review	v your hours.		
	Eval	uator		
valuator comments	-			
	Asse	essor		
SSESSOF COMMENTS ssessor comments on the trainee's and evaluator's comments or easons as required.	-			
				Save

Select Learning outcome and reflect on their level of proficiency, development during the PDS period and/or add additional supportive evidence that may be pertinent for this learning outcome. Reflection is required for all learning outcomes that require development.

Period: 2022-01-01 to 2 PDS Period: 1	2022-06-30				Trainee: Pam G Evaluator: Cher Assessor: Merc	reen ri Mohr y O'Conner
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclu	ide
Auto complete					Comp	lied: ×
earning outcomes						
<ul> <li>I - Ethics, values and attitudes</li> <li>1 a) Act honestly and demo</li> <li>Expected level: Level 2</li> </ul>	s Instrate personal integrity, account	ability and trustworthiness including	while interacting with others		Development	Initiated
<ul> <li>I - Ethics, values and attitudes</li> <li>1 b) Carry out work in a main Expected level: Level 2</li> </ul>	nner that protects public interest, t	he client, employer and other relevan	it stakeholders, and put these before	your own interest	Development	Initiated
I - Ethics, values and attitudes     2 b) Demonstrate how you     Expected level: Level 1	contributed to the ethical culture o	f your business environment			Development	Initiated
I - Ethics, values and attitudes     2 d) Display ethical behavio	; our whilst interacting with the organ	nisation's stakeholders			Development	Initiated
II - Citizenship, values and atti 1 a) Demonstrate a respons Expected level: Level 2	itudes sive, valuing and tolerant approach	to cultural diversity (local or global) a	and individual differences		Development	Initiated
II - Citizenship, values and atti 2 b) Weigh up short-term fi Expected level: Level 1	tudes nancial benefits against the long-te	erm strategic and/or societal impact o	of a decision		Development	Initiated
II - Citizenship, values and atti       2 c)       Evaluate the extent to	itudes which a business demonstrates a r	esponsive, valuing and tolerant appro	pach to cultural diversity and individua	al differences	Development	Initiated

Selecting "Auto Complete" button to submit all learning outcomes where development is not required and does not have unsolved evidence.

Select "**Complied**" toggle to view learning outcomes where no evidence was submitted during the PDS period and expected level has been met.

Trainees need to fill in the below field with their level of proficiency, development during the PDS period and/or add additional supportive evidence that may be pertinent for this learning outcome. Then click **"Save"** 

Professional Development Summa	ary		Not yet st	ubmitted for evaluation
Period: 2022-01-01 to 2022-06-30 PDS Period: 1				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner
Feedback summary Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude
				Back < >
I - Ethics, values and attitudes 1 - Personal ethics a) Act honestly and demonstrate personal integrity, account	tability and trustworthiness inc	cluding while interacting with o	thers	Initiated
No rating yet Expected level at this PDS Level 2				
No evidence during this PDS period				
	Trai	nee		
Trainee reflection Trainee reflects on their level of proficiency, development during the PDS period and/or add additional supportive evidence that may be pertinent for this learning outcome.	B I <u>U</u> ′ ⊑ ≡			
	Evalu	Jator		
Evaluator rating	-			
Development required Based on if expected level of proficiency has been achieved or not.	Yes			
Evaluator feedback Evaluator's feedback on the trainee's overall level of proficiency for				
this learning outcome.	٨٥٥	ssor		
Assessor rating	-			
Final required level of proficiency achieved Assessor indicates whether they are satisfied as to if the trainee has now achieved the final required level of proficiency for this learning outcome. This may need to be done through consultation with the evaluator (if the assessor is not also the evaluator). Only available if the assessor rating is at the minimum SAICA required level of proficiency. Not available if not the final PDS.	No			
Assessor's feedback Assessor's feedback on the trainee's level of proficiency for this learning outcome. If development required, this will also be displayed on the development plan.	-			
Cancel				Save

Trainee to either go back to the list to select another learning outcome and reflect on their level of proficiency, development during the PDS period and/or add additional supportive evidence that may be pertinent for this learning outcome:

Professional Development Summary						
Period: 2022-01-01 to 202 PDS Period: 1	22-06-30				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner	
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude	
					Complied: *	
Learning outcomes						
I - Ethics, values and attitudes 1 a) Act honestly and demonstree Expected level: Level 2	Development Submitted					
<ul> <li>I - Ethics, values and attitudes</li> <li>1 b) Carry out work in a manner that protects public interest, the client, employer and other relevant stakeholders, and put these before your own interest</li> <li>Expected level: Level 2</li> </ul>					Development Submitted	
I - Ethics, values and attitudes     2 b) Demonstrate how you con     Expected level: Level 1	tributed to the ethical culture of	yaur business environment			Development Submitted	

### Or, select arrows to navigate to the next learning outcome.

Professional Development Summary Submitted by trainee for evaluation				
Period: 2022-01-01 to 2022-06-30 PDS Period: 1			Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner	
Feedback summary Academic record	d Technical experience	Proficiency in PVAA's	Development plan	
			Back	
I - Ethics, values and attitudes Evaluated				
<ul> <li>a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others</li> </ul>				
No rating yet Expected level at this PDS Level 2				
No evidence during this PDS period				
Trainee				
Trainee reflection Trainee reflects on their level of proficiency, development during the PDS period and/or add additional supportive evidence that may	I am providing evidence			
be pertinent for this learning outcome.				

Please confirm that everything has been submitted before proceeding to "**Conclude**" tab. Anything that was documented will reflect into the development plan below.

Professional Deve	lopment Sumn	nary		Not yet sub	mitted for evaluation
Period: 2022-01-01 to 202: PDS Period: 1	2-06-30				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude
Development plan					
<ul> <li>I - Ethics, values and attitudes</li> <li>1 - Personal ethics</li> <li>a) Act honestly and demonstration</li> </ul>	ate personal integrity, acco	ountability and trustworthiness	including while interacting with	others	Submitted
Trainee					Details
Trainee reflection:		am providing evidence	e		
Evaluator					
Training required:		-			
Related technical competence	cies:	-			
Development comment:		-			
Evaluator feedback:		-			
Assessor					
Assessor feedback:		-			
I - Ethics, values and attitudes 1 - Personal ethics b) Carry out work in a manner	that protects public intere	ist, the client, employer and oth	er relevant stakeholders, and pu	it these before your own interes	Submitted
Trainee					Details
Trainee reflection:		I am providing evidence	e		
Evaluator					
Training required:		-			
Related technical competence	cies:	-			
Development comment:		-			
Evaluator feedback:		-			
Assessor					
Assessor feedback:		-			

### Select "Submit" to send Professional Development Summary to Evaluator.

Professional Development Summary Not yet submitted for evaluation					
Period: 2022-01-01 to 2 PDS Period: 1	2022-06-30				Trainee: Pam Green Evaluator: Cherri Mohr Assessor: Mercy O'Conner
Feedback summary	Academic record	Technical experience	Proficiency in PVAA's	Development plan	Conclude
Submit to Evaluator					Submit

Please note that the Professional Development Summary has been submitted and awaiting feedback from the Evaluator.

#### Assessment Instruments

Learning Outcome	Reviews	Professional Development Summaries	
			All roles 🗸
SUBMITTED	TRAINEE	DETAILS	STATUS
2022-01-31	Pam Green	2022-01-01 to 2022-06-30 Submitted for evaluation to Cherri Mohr	Awaiting Evaluator