

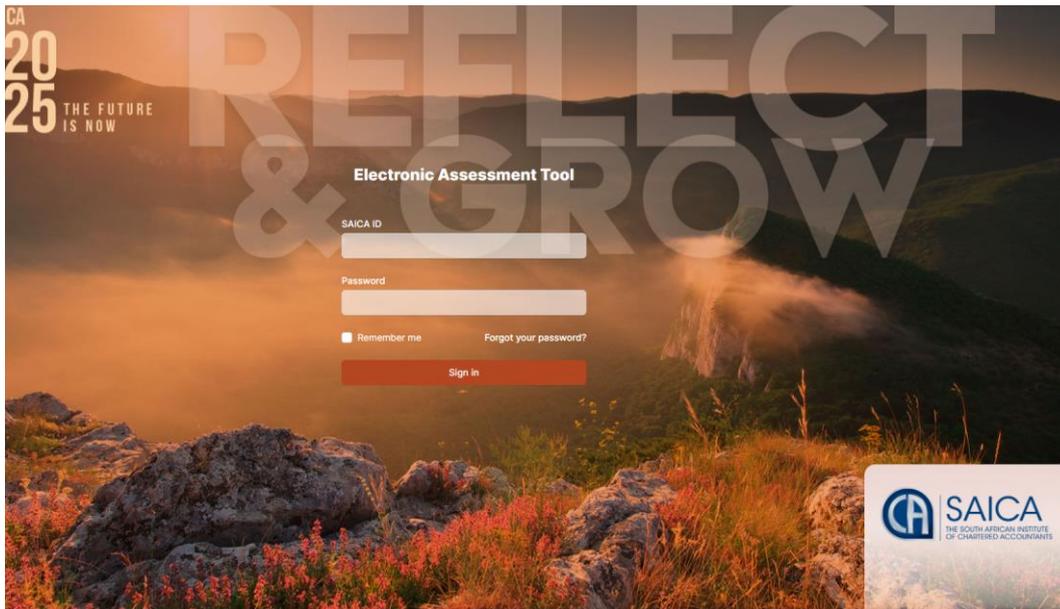


## **CA2025 TRAINING PROGRAMME**

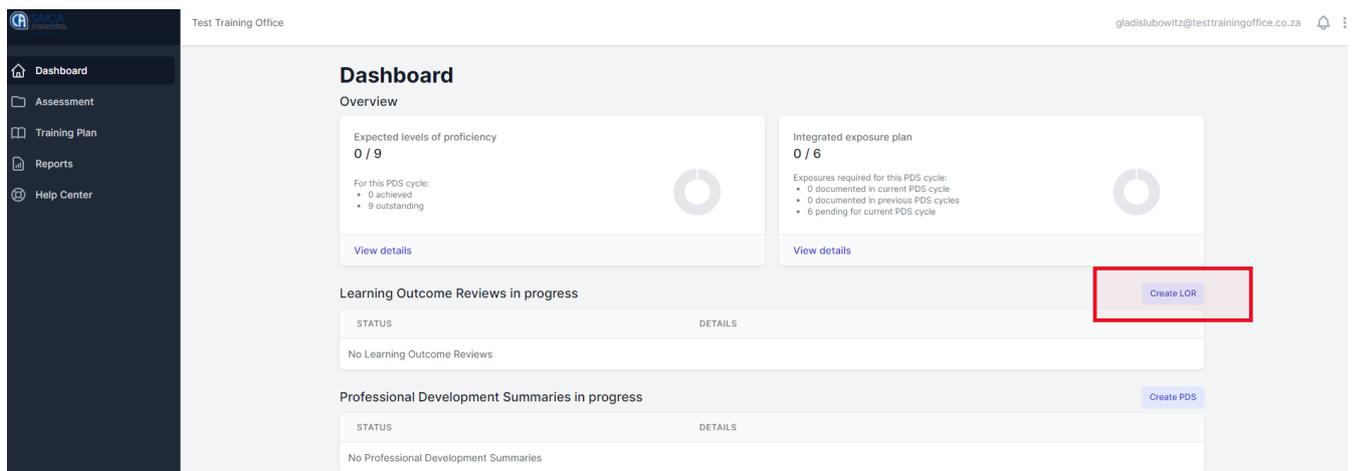
### **Electronic Assessment Tool**

#### **Creating a Professional Development Summary (PDS)**

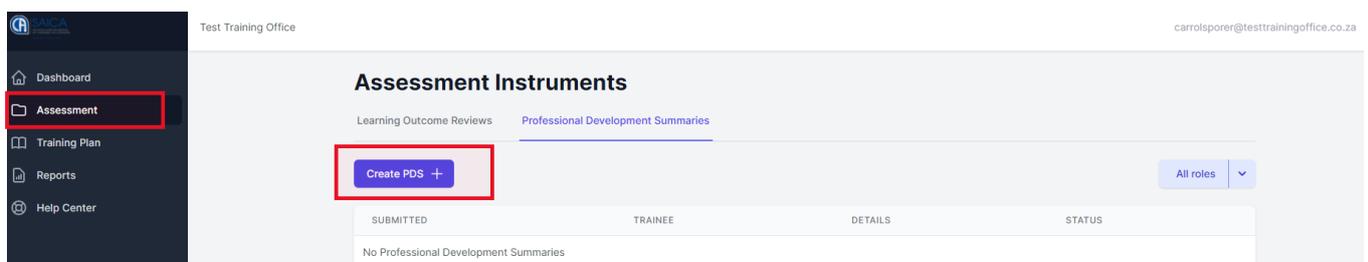
Please login to the Electronic Assessment Tool using your 8-digit “SAICA ID” followed by your password.



Select “Create PDS” on the dashboard.



Or alternatively select “Assessment” then “Create PDS”



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

**Create Professional Development Summary**  
Get started by filling in the information below to create your new Professional Development Summary.

Learning outcome reviews that will be linked to this PDS:

Jan-22	⊖ No LOR's submitted in this period
Feb-22	⊖ No LOR's submitted in this period
Mar-22	⊖ No LOR's submitted in this period
Apr-22	⊖ No LOR's submitted in this period
May-22	⊖ No LOR's submitted in this period
Jun-22	⊖ No LOR's submitted in this period

Evaluator:

Assessor:

Period start date:

Period end date:

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 will be linked to this PDS:

Jan-22	⊖ No LOR's submitted in this period
Feb-22	⊖ No LOR's submitted in this period
Mar-22	⊖ No LOR's submitted in this period
Apr-22	⊖ No LOR's submitted in this period
May-22	⊖ No LOR's submitted in this period
Jun-22	⊖ No LOR's submitted in this period

Evaluator:

Assessor:

Period start date:

Period end date:

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 2022-06-30  
PDS Period: 1

Trainee: Pam Green  
Evaluator: Cheri Mohr  
Assessor: Mercy O'Conner

Not yet submitted for evaluation

Feedback summary Academic record Technical experience Proficiency in PVAA's Development plan Conclude

#### Feedback summary

A summary of LORs submitted and feedback received during the current PDS cycle.

Feedback summary table

Jan-22	No LOR's submitted in this period
Feb-22	No LOR's submitted in this period
Mar-22	No LOR's submitted in this period
Apr-22	No LOR's submitted in this period
May-22	No LOR's submitted in this period
Jun-22	No LOR's submitted in this period

Trainee

Trainee comments

Trainee provides reasons or comments on non-compliance or issues they may have experienced regarding finalising LORs.

Evaluator

Evaluator comments

Evaluator comments on the trainee's comments or reasons above.

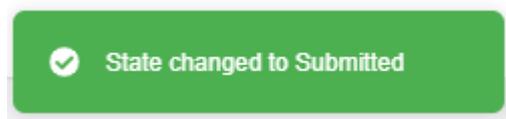
Assessor

Assessor comments

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

Not yet submitted 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

**Academic record** Initiated

Academic progress and assistance required.

Trainee

**SAICA accredited qualification**

Trainee indicates if they have a SAICA accredited degree/bridging/postgraduate qualification at the point of entry to the training contract. If yes, this section is optional.

**Academic progress**

If relevant, the trainee documents the state of their academic progress during this PDS period. This should include details such as test results to date (where applicable), weekly time spent on studies and the status of your studies (is the trainee on track to pass or not?). In the case of aspects of this record that point to unsatisfactory progress (poor test scores, insufficient time spent on studies or reduced chances of success in exams), the trainee should describe in detail how they plan to address those problem areas.

**Support**

Trainee has an opportunity to indicate if any support from the TO may be required regarding their academic progress.

Evaluator

**Evaluator feedback**

Evaluator provides feedback as required including support provided by TO.

Assessor

**Assessor feedback**

Assessor provides feedback as required.

**Save**

Drill down to see technical competencies expected.

### Professional Development Summary

Not yet submitted 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** Initiated

Technical experience captured in the LORs compared to planned experience per the training plan and a reflection on Core hours, to facilitate reflection on the range and depth of exposure and the impact on development of the PVAA learning outcomes.

Exposure to technical competencies

Inputs	Expected	Exposed	Total
<b>A1 - Governance model</b>	0	0	0
<b>A2 - Business strategy</b>			
<b>1 - Strategy development process</b>	0	0	0
<b>2 - External and internal influences on the organisation's strategy</b>	0	0	0
<b>3 - Implementing strategy</b>			
a) Review context relevant models to appraise the organisation's capabilities to achieve the business strategy and purpose	0	0	0
b) Identify and evaluate significant business risks, strengths, weaknesses, opportunities and threats associated with the organisation's external and internal environments	0	0	0
c) Prepare a strategic response to the organisation's competitive environment by applying strategic analysis tools to identified external and internal factors	0	0	0
d) Assess the risk tolerance of the entity's stakeholders' and its balance with opportunity	0	0	0
<b>e) Identify priorities and actions either to mitigate critical risks or capitalise on opportunities</b>	1	0	0
f) Formulate insights into future opportunities and risks	0	0	0
<b>4 - IT and data strategy</b>	0	0	0
<b>A3 - Aligning the business model with the business strategy</b>	1	0	0
<b>A4 - Finance strategy</b>	0	0	0
<b>A5 - Tax strategy</b>	0	0	0
<b>Business Activities</b>	Expected 3	Exposed 0	Total 0
<b>Outputs leading to outcomes</b>	Expected 6	Exposed 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 PVAA's, and capture core hours in as much detail as required by the training office policy.

### Professional Development Summary Not yet submitted for evaluation

Period: 2022-01-01 to 2022-06-30 Trainee: Pam Green  
 PDS Period: 1 Evaluator: Cherri Mohr  
Assessor: Mercy O'Conner

Feedback summary
Academic record
Technical experience
Proficiency in PVAA's
Development plan
Conclude

**Technical experience** Initiated

Technical experience captured in the LORs compared to planned experience per the training plan and a reflection on Core hours, to facilitate reflection on the range and depth of exposure and the impact on development of the PVAA learning outcomes.

Exposure to technical competencies

<b>Inputs</b>	Expected 2 Exposed 0 Total 0
<b>Business Activities</b>	Expected 3 Exposed 0 Total 0
<b>Outputs leading to outcomes</b>	Expected 6 Exposed 0 Total 0

Trainee

**Trainee comments**

Trainee reflects on range and depth of exposure to the TC compared to the IEP and the impact on opportunities to develop/demonstrate the PVAA's.

**Core hours**

Enter Core Hours completed in the current PDS cycle. The Cumulative hours will calculate automatically when you save.

	EXPOSURE DURING PDS PERIOD	CUMULATIVE EXPOSURE
A - Strategy and governance to create sustainable value	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
B - Stewardship of capitals: business processes and risk management	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
C - Decision-making to increase, decrease or transform capitals	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
D - Reporting on value creation	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
E - Compliance	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
F - Assurance and related services	<input type="text" value="0,0"/>	<input type="text" value="0.0"/>
	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Total core hours is less than required for a PDS period on your training plan. Please review your hours.

Evaluator

**Evaluator comments**

Evaluator comments on the trainee's comments or reasons above.

-

Assessor

**Assessor comments**

Assessor comments on the trainee's and evaluator's comments or reasons as required.

-

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

## Professional Development Summary

Not yet submitted 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

Submitted

Technical experience captured in the LORs compared to planned experience per the training plan and a reflection on Core hours, to facilitate reflection on the range and depth of exposure and the impact on development of the PVAA learning outcomes.

Exposure to technical competencies

<b>Inputs</b>	Expected 2	Exposed 0	Total 0
<b>Business Activities</b>	Expected 3	Exposed 0	Total 0
<b>Outputs leading to outcomes</b>	Expected 6	Exposed 0	Total 0

Trainee

**Trainee comments**

Trainee 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 that would have given me the opportunity to get the expected exposure so as to achieve the PVAAs for the period.

From the technical work actually undertaken, happy with opportunity to demonstrate and develop on the PVAAs

**Core hours**

Enter Core Hours completed in the current PDS cycle. The Cumulative hours will calculate automatically when you save.

	EXPOSURE DURING PDS PERIOD	CUMULATIVE EXPOSURE
A - Strategy and governance to create sustainable value	10,0	10.0
B - Stewardship of capitals: business processes and risk management	20,0	20.0
C - Decision-making to increase, decrease or transform capitals	15,0	15.0
D - Reporting on value creation	5,0	5.0
E - Compliance	0,0	0.0
F - Assurance and related services	0,0	0.0
<b>Total core hours</b>	<b>50.00</b>	<b>50.00</b>

Total core hours is less than required for a PDS period on your training plan. Please review your hours.

Evaluator

**Evaluator comments**

Evaluator comments on the trainee's comments or reasons above.

-

Assessor

**Assessor comments**

Assessor comments on the trainee's and evaluator's comments or reasons as required.

-

Save

Show history

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.

**Professional Development Summary** Not yet submitted 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

Auto complete Complied:

Learning outcomes

Learning Outcome	Expected Level	Development	Initiated
I - Ethics, values and attitudes 1 a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others	Level 2	Development	Initiated
I - Ethics, values and attitudes 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	Level 2	Development	Initiated
I - Ethics, values and attitudes 2 b) Demonstrate how you contributed to the ethical culture of your business environment	Level 1	Development	Initiated
I - Ethics, values and attitudes 2 d) Display ethical behaviour whilst interacting with the organisation's stakeholders	Level 2	Development	Initiated
II - Citizenship, values and attitudes 1 a) Demonstrate a responsive, valuing and tolerant approach to cultural diversity (local or global) and individual differences	Level 2	Development	Initiated
II - Citizenship, values and attitudes 2 b) Weigh up short-term financial benefits against the long-term strategic and/or societal impact of a decision	Level 1	Development	Initiated
II - Citizenship, values and attitudes 2 c) Evaluate the extent to which a business demonstrates a responsive, valuing and tolerant approach to cultural diversity and individual differences	Level 2	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 Summary Not yet submitted for evaluation

Period: 2022-01-01 to 2022-06-30 Trainee: Pam Green  
 PDS Period: 1 Evaluator: Cherrí Mohr  
Assessor: Mercy O'Conner

Feedback summary
Academic record
Technical experience
Proficiency in PVAA's
Development plan
Conclude

Back < >

**I - Ethics, values and attitudes** Initiated

1 - Personal ethics

a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others

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 be pertinent for this learning outcome.

B I U ☰ ☰

Evaluator

Evaluator rating -

Development required Yes

Based on if expected level of proficiency has been achieved or not.

Evaluator feedback -

Evaluator's feedback on the trainee's overall level of proficiency for this learning outcome.

Assessor

Assessor rating -

Final required level of proficiency achieved No

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.

Assessor 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** Not yet submitted 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

Complied:

Learning outcomes

- I - Ethics, values and attitudes
  - 1 a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others Development Submitted
  - Expected level: Level 2
- I - Ethics, values and attitudes
  - 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 Development Submitted
  - Expected level: Level 2
- I - Ethics, values and attitudes
  - 2 b) Demonstrate how you contributed to the ethical culture of your business environment Development Submitted
  - Expected level: Level 1

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   Technical experience   **Proficiency in PVAA's**   Development plan

Back < >

I - Ethics, values and attitudes Evaluated

1 - Personal ethics

a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others

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 be pertinent for this learning outcome.

I am providing evidence

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

### Professional Development Summary

Not yet submitted for evaluation

Period: 2022-01-01 to 2022-06-30  
PDS Period: 1

Trainee: Pam Green  
Evaluator: Cheri Mohr  
Assessor: Mercy O'Conner

Feedback summary   Academic record   Technical experience   Proficiency in PVAA's   **Development plan**   Conclude

Development plan

I - Ethics, values and attitudes Submitted

1 - Personal ethics

a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others Details

Trainee

Trainee reflection: <p>I am providing evidence </p>

Evaluator

Training required: -

Related technical competencies: -

Development comment: -

Evaluator feedback: -

Assessor

Assessor feedback: -

I - Ethics, values and attitudes Submitted

1 - Personal ethics

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 Details

Trainee

Trainee reflection: <p>I am providing evidence </p>

Evaluator

Training required: -

Related technical competencies: -

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 2022-06-30  
PDS Period: 1

Trainee: Pam Green  
Evaluator: Cheri 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 <a href="#">Cherri Mohr</a>	Awaiting Evaluator 📅 2022-01-31