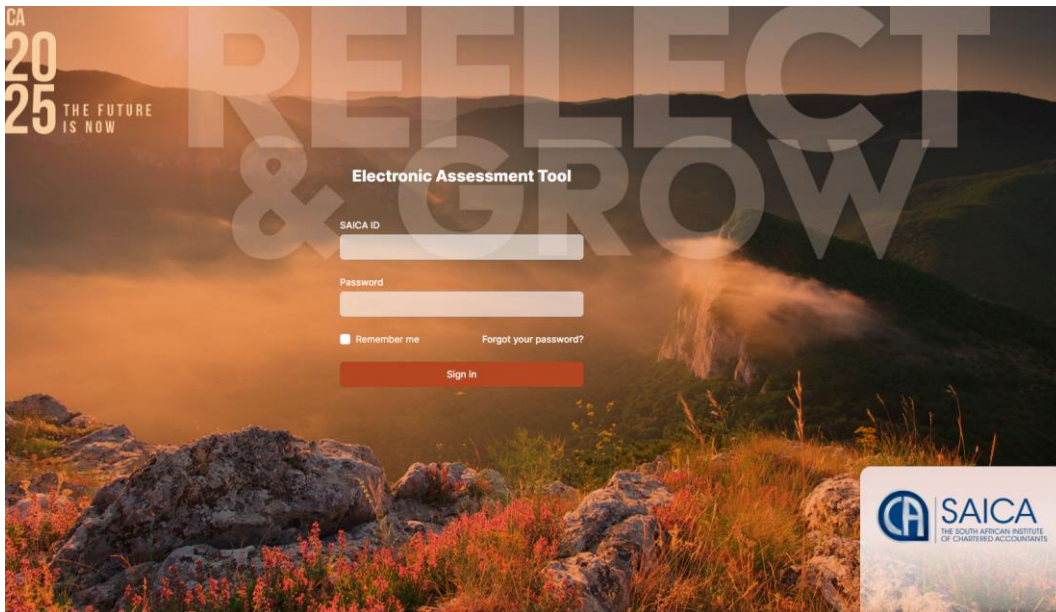**CA2025 TRAINING PROGRAMME**
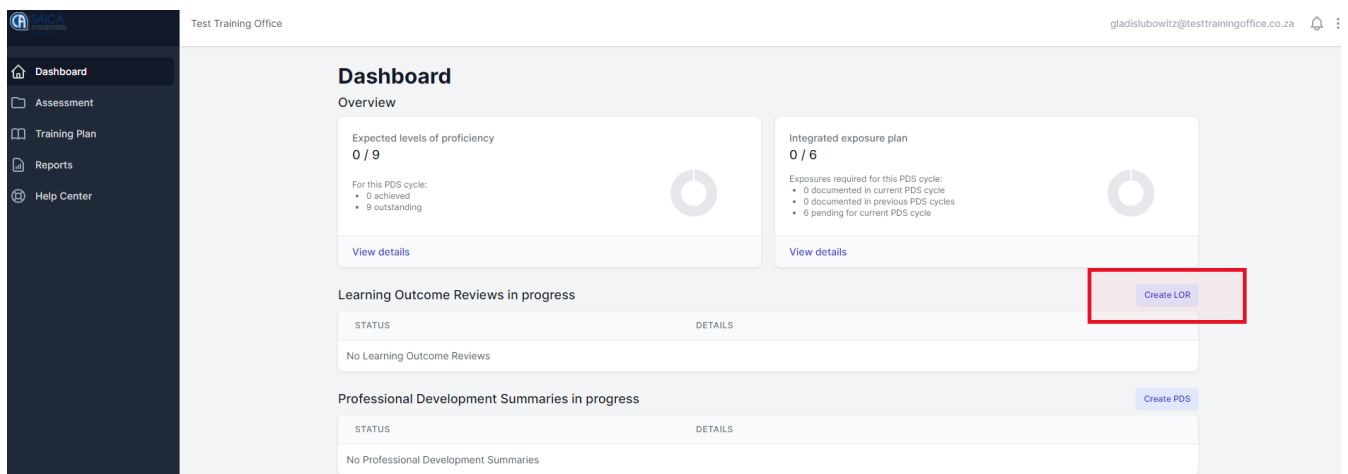
Electronic Assessment Tool
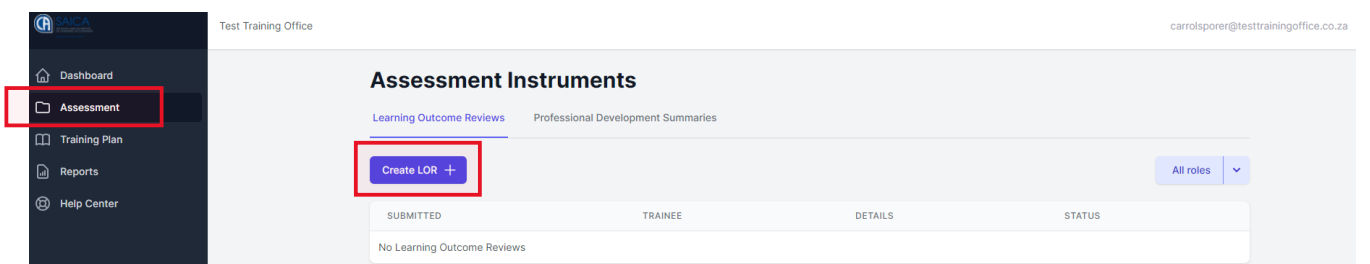
Creating a Learning Outcome Review (LOR)

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

Select **"Create LOR"** on the dashboard.

Or alternatively select **"Assessment"** then **"Create LOR"**

Fill in the required fields listed below.

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

Please provide details regarding the technical tasks performed. It should be clear from the information documented, why the selected learning outcomes are linked to this work.

Assessment > Learning Outcome Review

Learning Outcome Review

Not yet submitted for review

Rotation 1 to Financial Management Team

Trainee: Carrol Sporer
Reviewer: Brendan Dietrich

Technical context ⌄

| Technical Context | Professional Values and Attitudes | Enabling Acumens | Conclude |

**Technical context for the learning outcome review**   Initiated
Describe the task/rotation and link technical competency learning outcomes to the work performed.

No learning outcomes have been added to the Technical Context.

Trainee

Task(s) performed

Provide detail regarding the technical task performed. It should be clear from the information documented, why the selected learning outcomes link to this work.

B I U   ☰ ☰

Reviewer

Accept   -
Reviewer accepts that the trainee performed this task.

Reviewer feedback   -

Reviewer's optional feedback regarding the task performed by the trainee. Required if the reviewer did not accept the task performed by the trainee.

Trainee

Trainee comment   -
Trainee's optional comment on the reviewer's feedback.

Save

Select learning outcomes from SAICA Competency Framework ⌄

Technical competency learning outcomes linked to the work performed:

No learning outcomes

Show history

Please ensure that learning outcomes are selected before saving and proceeding to the Professional Values and Attitudes tab.

Assessment > Learning Outcome Review

Learning Outcome Review

Not yet submitted for review

Rotation 1 to Financial Management Team

Trainee: Carrol Sporer
Reviewer: Brendan Dietrich

Technical context ⌃
-

| Technical Context | Professional Values and Attitudes | Enabling Acumens | Conclude |

Technical context for the learning outcome review   Initiated
Describe the task/rotation and link technical competency learning outcomes to the work performed.

No learning outcomes have been added to the Technical Context.

Trainee

Task(s) performed

Provide detail regarding the technical task performed. It should be clear from the information documented, why the selected learning outcomes link to this work.

B *I* U ≣ ☰

I have just started on a new rotation in a department that is a lot more tech savvy than our other departments (don't tell them). Before i could complete the audit i had the familiarize myself with:
• the IT governance structures and practices so that i could better consider the controls and risk in the IT environment.
• the business processes and digital technologies in use
Learning what i did in this environment also meant i was able to add value in the next department i rotated to that still runs very manual processes.

Reviewer

Accept   -

Reviewer accepts that the trainee performed this task.

Reviewer feedback   -

Reviewer's optional feedback regarding the task performed by the trainee. Required if the reviewer did not accept the task performed by the trainee.

Trainee

Trainee comment   -

Trainee's optional comment on the reviewer's feedback.

Save

Select learning outcomes from SAICA Competency Framework ⌃

Only show learning outcomes according to IEP: ✕

Inputs

Business Activities

Outputs leading to outcomes

Technical competency learning outcomes linked to the work performed:

No learning outcomes

Show history

Select a learning outcome from the SAICA competency Framework which best links with the above-mentioned task that was performed.

Please select highlighted dropdown to see learning outcomes according to ELP (Expected Levels of Proficiency). Only EPL that are in line with trainees expected proficiency will be displayed.

Please note that selected learning outcomes will be displayed at the bottom of the screen.

To remove a learning outcome, select the delete icon located on the right-hand side of learning outcome added.

C2 - Financing decisions

C3 - Investment decisions

C4 - Use of derivatives

C5 - Business valuation

C6 - Performance management systems

C7 - Financially troubled businesses

C8 - Tax law implications

Outputs leading to outcomes

Technical competency learning outcomes linked to the work performed:

A1 - Governance model

4 a)   Understand the IT governance structures and practices of the organisation

The below pop up will appear requesting you to confirm if you want to remove learning outcomes that were recently added.

Remove learning outcome?

Cancel   Remove

Once all related outcomes have been added, please click **"Save"** the proceed to the next tab.

Technical competency learning outcomes linked to the work performed:

A1 - Governance model

4 a)   Understand the IT governance structures and practices of the organisation

B2 - Business systems and processes

1 g)   Describe possible IT and digital solutions to automate and improve existing processes and/or introduce new technologies by considering different alternatives, key factors and cost benefit implications

Select drop down and proceed with selecting learning outcomes that were performed.

Assessment > Learning Outcome Review

Learning Outcome Review

Not yet submitted for review

Rotation 1 to Financial Management Team

Trainee: Carrol Sporer
Reviewer: Brendan Dietrich

Technical context

-

Technical Context	Professional Values and Attitudes	Enabling Acumens	Conclude

Select learning outcomes from SAICA Competency Framework

Learning outcomes demonstrated

No learning outcomes

January 2022

Select a learning outcome which describes tasks that were performed.

Click on recently added learning outcome and provide evidence regarding task selected.

Provide evidence of how you demonstrated the above selected learning outcome within the technical context (Document who, what, where, when and how) and reflect on the level of complexity of the situation encountered. Then click **"Save"**

Please note that trainee has the option to reflect on Supportive training that assisted them to demonstrate this learning outcome in below field, as well as Reflect on your development in relation to this learning outcome. Consider what requires attention, what action you need to take to develop further and what support you require.

Please confirm that has been submitted before proceeding to **"Enabling Acumens"** tab.

Select drop down and proceed with selecting learning outcomes that were performed.

Click on recently added learning outcome and provide evidence regarding task selected.

Provide evidence of how you demonstrated the above selected learning outcome within the technical context (Document who, what, where, when and how) and reflect on guidance required, integration of knowledge sources and skills, analysis evaluation and recommendations made and whether you took responsibility for your own work and/or the work of others. Then use "decision Tree" to confirm if expected level has been met.

Learning Outcome Review

Not yet submitted for review

Rotation 1 to Financial Management Team

Trainee: Carrol Sporer
Reviewer: Brendan Dietrich

Technical context ∧

-

| Technical Context | Professional Values and Attitudes | Enabling Acumens | Conclude |

Back ‹ › 🗑

X - Relational acumen   Initiated
3 - People skills
b) Display conflict resolution skills to minimise the impact of or resolve conflict

No rating yet   Expected level at next PDS   Level 3

Recent evidence ∨

Trainee

Evidence

Provide evidence of how you demonstrated this learning outcome within the Technical Context (document who, what, where, when and how) and reflect on guidance required, integration of knowledge sources and skills, analysis, evaluation, recommendations made and whether you took responsibility for your own work and/or the work of others.

B I U ≔ ☰

The evidence that i included regarding the manager asking me to expand my sample has bearing here. Following our initial interaction it was not easy to obtain the information i required. I was hyper-aware of my internal frustration but i remained professional and courteous in my engagement. And yesterday she apologized to me

Supportive training

Provide details of any formal or informal training, research, guidance, discussion or intervention that assisted you to demonstrate this learning outcome.

Trainee rating

Decision Tree	Path A Level 3
Rating achieved at previous PDS:	No rating yet
Expected level at next PDS:	Level 3

Reviewer

Reviewer rating   -

Trainee
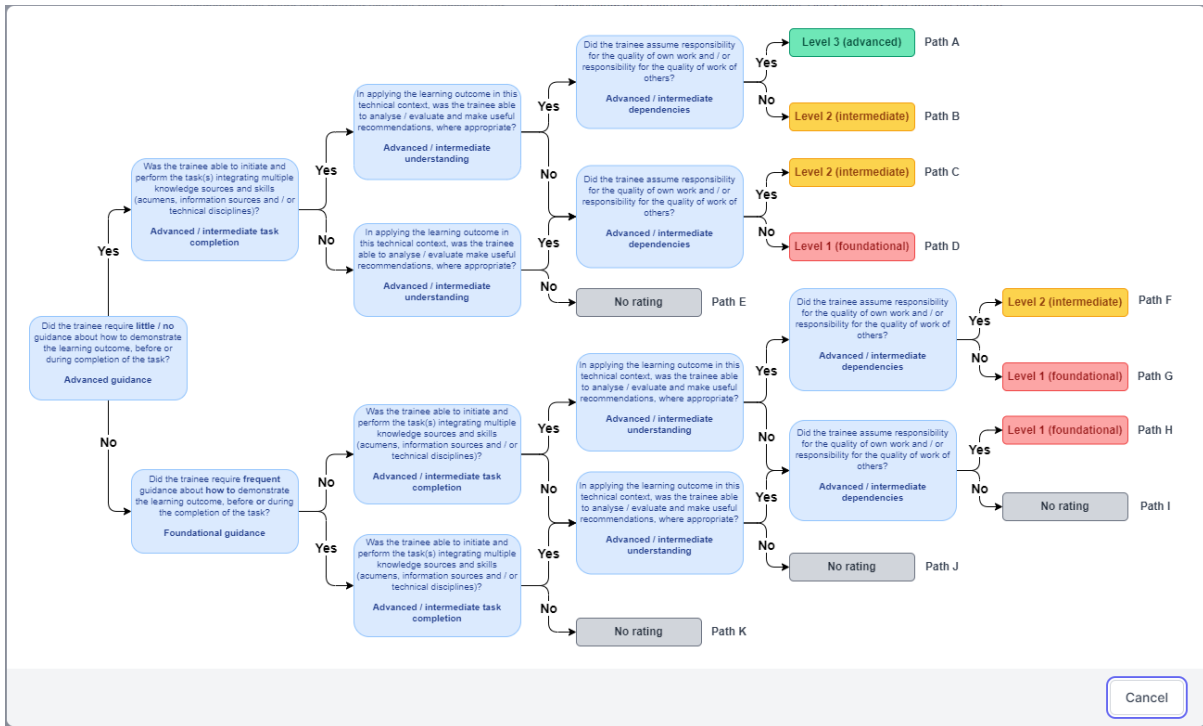
Trainee Comments on Reviewer Feedback   -

Cancel   Save

Please select highlighted drop down so you can view the technical context at the top of the screen.

Please use **"decision Tree"** to confirm if expected level has been met.

Please note that reflection on development needs to be documented when expected level is not met.

Please confirm that has been submitted before proceeding to **"Conclude"** tab.

Select **"Submit"** to send learning Outcome Review to Reviewer.

Please note that the Learning Outcome Review has been submitted and awaiting feedback from the reviewer.