

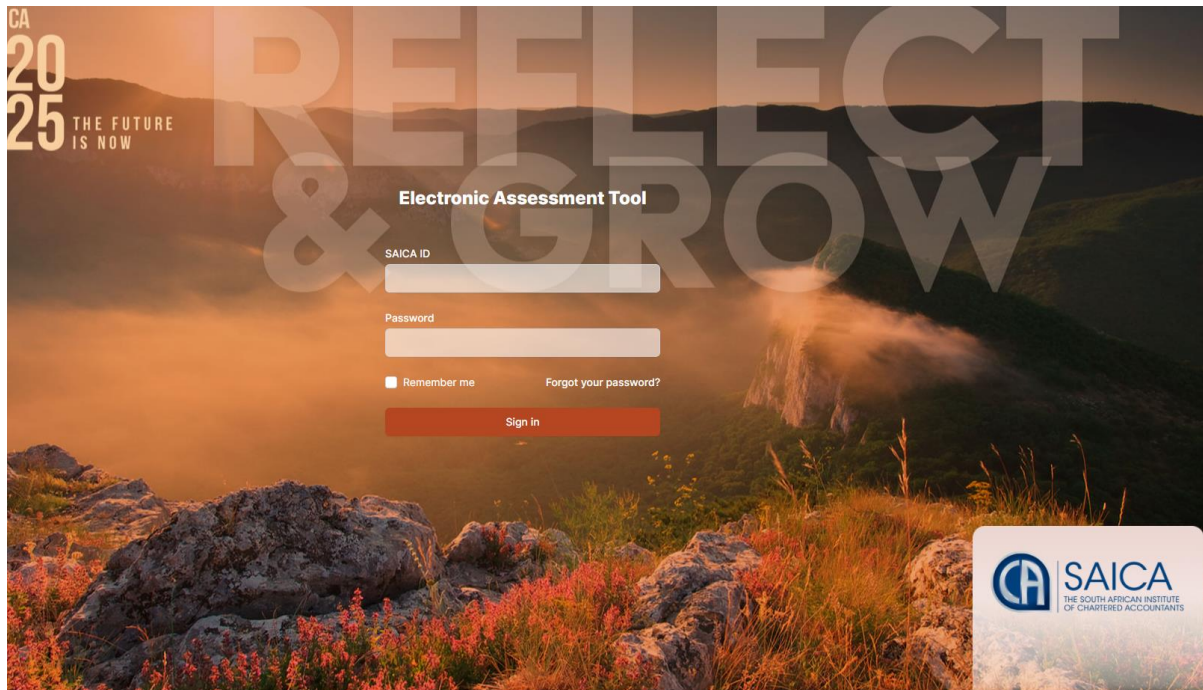


CA2025 TRAINING PROGRAMME

Electronic Assessment Tool

Evaluator PDS Review

Please login to the Electronic Assessment Tool using your 8-digit “SAICA ID” followed by your password. Please note that the following task may only be performed by an “Evaluator”.



Select “Action required” to proceed with review

Dashboard

Professional Development Summaries in progress

STATUS	DETAILS	
Submitted for evaluation 2022-02-10	Bettye Champlin 2022-01-01 to 2022-06-30	Action required

Or alternatively select “Assessment” then “Professional Development Summaries”

Assessment Instruments

Learning Outcome Reviews Professional Development Summaries

All roles ▾

SUBMITTED	TRAINEE	DETAILS	STATUS
No Professional Development Summaries			

Evaluator may provide feedback or comments on trainee’s non-compliance or issues they may have experienced regarding finalizing LORs, then click **“Save”**

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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.

Submitted

Feedback summary table

Jan-22	No LOR's submitted in this period
Feb-22	Rotation 1 to Financial Management Team Submitted: 2022-02-03 Reviewer: Thaddeus Kulas First review: 2022-02-03 Finalised: 2022-02-07
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.

I was idle in the office due to Covid, not allowing the team to go to the client and carry out our testing during January 2022. I was on sick leave during January 2022 after having gone for knee surgery.

Evaluator

Available actions: Evaluate | Request revision

Evaluator comments

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

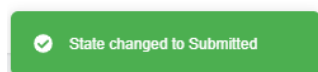
Assessor

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, Evaluator needs to reflect on Academic progress provided by trainee and any support required. Then click on “Save”

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Academic record Submitted

Academic progress and assistance required.

Trainee

SAICA accredited qualification Yes

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

Available actions: Evaluate | Request revision

Evaluator feedback

Evaluator provides feedback as required including support provided by TO.

Assessor

Assessor feedback

Assessor provides feedback as required.

Save

Please note that Evaluator may select “Request revision” and request revision from trainee regarding academic progress.

Fill in the below field, Evaluator needs to comment/feedback on technical competencies provided by trainee. Then click on **“Save”**

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Inputs	Expected 1	Exposed 1	Total 1
Business Activities	Expected 2	Exposed 1	Total 1
Outputs leading to outcomes	Expected 3	Exposed 0	Total 0

Trainee

Trainee comments

Trainee reflects on range and depth of exposure during the period (technical competency learning outcomes recorded in LORs) compared to planned exposure in the Integrated Exposure Plan and the impact on opportunities to develop/demonstrate proficiency in the Professional Values, Attitudes and Acumens.

I had spells away from work that would have given me the opportunity to get the expected exposure so as to achieve the PVAA's for the period. From the technical work actually undertaken, happy with opportunity to demonstrate and develop on 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	10.0	10.0
B - Stewardship of capitals: business processes and risk management	80.0	80.0
C - Decision-making to increase, decrease or transform capitals	60.0	60.0
D - Reporting on value creation	20.0	20.0
E - Compliance	80.0	80.0
F - Assurance and related services	160.0	160.0
	410.00	410.00

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

Evaluator

Available actions:
Evaluate
Request revision

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

January 2022

5

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 Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Auto complete Complied:

Learning outcomes

- I - Ethics, values and attitudes
 - 1 a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others 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 a) Evaluate the impact of ethics within a specific business environment (a client or your training office) and how ethics is managed in that context Development Submitted
 - Expected level: Level 1

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.

Professional Development Summary Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Complied:

Learning outcomes

- 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 Complied
 - Expected level: Level 0
- 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 Complied
 - Expected level: Level 0

Fill in the below field, Evaluator needs to provide feedback on the trainee's level of proficiency for this learning outcome. Then use "decision Tree" to confirm if expected level has been met and click on "Save"

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Back < >

I - Ethics, values and attitudes Submitted

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

Evidence for this PDS period

Rotation 1 to Financial Management Team
2022-02-03

Trainee

Trainee reflection

Trainee provides evidence of how the learning outcome has been demonstrated for the purposes of RPL. To reflect multiple examples, please number each item of evidence.

-

Evaluator

Available actions: Evaluate Request revision

Evaluator rating

Decision Tree -

Rating achieved at previous PDS: No rating yet

Expected level of proficiency: Level 2

SAICA final required level: Level 3

Development required No

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 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.

-

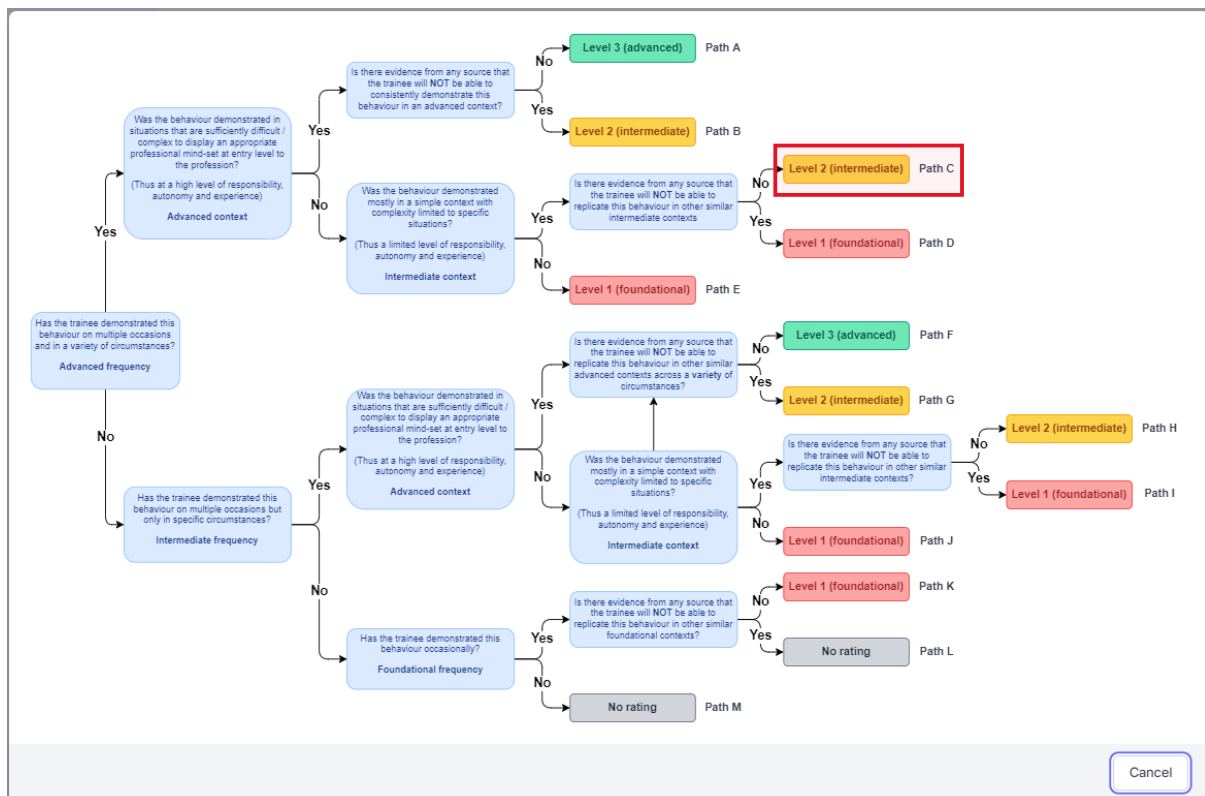
Cancel Save

Show history

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

Evaluator	
Available actions:	<input type="button" value="Evaluate"/> <input type="button" value="Request revision"/>
Evaluator rating	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Decision Tree</div>
Rating achieved at previous PDS:	No rating yet
Expected level of proficiency:	Level 2
SAICA final required level:	Level 3

Please click on desired path to select proficiency level.



Please note that Evaluator may select “**Request revision**” to request revision.

Evaluator	
Available actions:	<input type="button" value="Evaluate"/> <input type="button" value="Request revision"/>
To be resubmitted reason	<div style="border: 1px solid red; height: 40px; width: 100%;"></div>
Evaluator rating	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Decision Tree</div>
Rating achieved at previous PDS:	No rating yet
Expected level of proficiency:	Level 1
SAICA final required level:	Level 3

Please confirm that everything has been submitted before proceeding to “**Conclude**” tab If Development is required, this will be displayed on the development plan.

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Development plan

Z - Business acumen Evaluated

2 - Business external environment

b) Evaluate the influence of the external environment (political, economic, tax policy, social, technological, legal, and environmental) on an organisation's strategy, business model or processes Details

Trainee	
Trainee reflection:	<p>Providing evidence regarding proficiency </p>
Evaluator	
Training required:	-
Related technical competencies:	-
Development comment:	Trainee has achieved expected level of proficiency
Evaluator feedback:	Trainee has achieved expected level of proficiency
Assessor	
Assessor feedback:	-

Y - Decision-making acumen Evaluated

1 - Critical thinking

a) Select and manage information (quantitative as well as qualitative) from multiple sources and perspectives through research, analysis, synthesis and integration Details

Trainee	
Trainee reflection:	<p>Providing evidence regarding proficiency </p>
Evaluator	
Training required:	-
Related technical competencies:	-
Development comment:	Trainee has not achieved expected level of proficiency
Evaluator feedback:	Trainee has not achieved expected level of proficiency
Assessor	
Assessor feedback:	-

Select “**Submit**” to send Professional Development Summary to Assessor.

Professional Development Summary

Submitted by trainee for evaluation

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

Trainee: Bettye Champlin
Evaluator: Tressie Braun
Assessor: Laverna Monahan

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

Submit to Assessor
Submit