

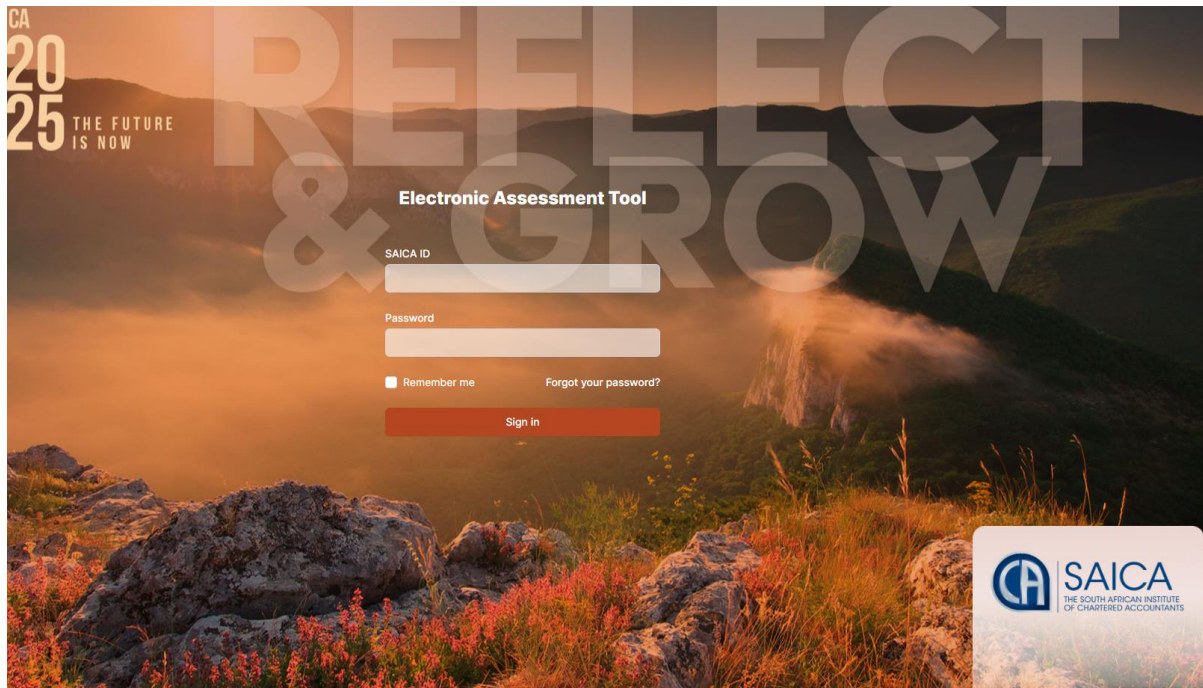


CA2025 TRAINING PROGRAMME

Electronic Assessment Tool

Assessor 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 “Assessor”.



Select “**Action required**” to proceed with review

Dashboard

Overview

October 2021 - Compliance status

54

54 trainee(s) have not yet submitted a Learning outcome review for October 2021.

[View details](#)

Professional Development Summaries in progress

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

Assessor 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 evaluator for assessment

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

Evaluated

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	Rotation 1 to Financial Management Team Submitted: 2022-02-03 Reviewer: Thaddeus Kulas First review: 2022-02-03 Finalised: 2022-02-07 View
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

Evaluator comments

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

Trainee has achieved expected level of proficiency

Assessor

Available actions: [Accept](#) [Request re-evaluation](#)

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, Assessor needs to reflect on comments/feedback provided by the trainee and Evaluator. Then click on **“Save”**

Professional Development Summary

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Academic record

Evaluated

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

Wrote the first CA board exam and thankfully passed

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

Trainee has achieved expected level of proficiency

Evaluator provides feedback as required including support provided by TO.

Assessor

Available actions:

Accept

Request re-evaluation

Assessor feedback

Assessor provides feedback as required.

Save

Please note that Assessor may select **“Request re-evaluation”** and request a re-evaluation.

Assessor

Available actions: Accept Request re-evaluation

Reevaluation reason

Required if the assessor indicated a re-evaluation.

Assessor feedback

Assessor provides feedback as required.

Save

Fill in the below field, Assessor needs to Comment/feedback on the trainee's and evaluator's comments provided. Then click on **"Save"**

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Technical experience

Evaluated

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

Evaluator comments

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

Trainee has achieved expected level of proficiency

Assessor

Available actions:

Accept

Request re-evaluation

Assessor comments

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

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

Auto complete Completed: ☐

Learning outcomes

I - Ethics, values and attitudes		
1 a)	Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others	Evaluated
Expected level: Level 2 Evaluator rating: 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	Evaluated
Expected level: Level 2 Evaluator rating: 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	Evaluated
Expected level: Level 1 Evaluator rating: Level 3		
I - Ethics, values and attitudes		
2 b)	Demonstrate how you contributed to the ethical culture of your business environment	Evaluated
Expected level: Level 1 Evaluator rating: Level 1		
I - Ethics, values and attitudes		
2 c)	Use an ethical reasoning process (based on professional values and attitudes and the code of professional conduct) to - (i) Identify threats to ethical principles, (ii) Analyse all courses of potentially unethical action as well as the consequences of each, (iii) Choose the appropriate course of action to solve the dilemma, and (iv) Report ethical issues to higher levels of management, SAICA, legal or regulatory authorities, or others when necessary (v) in the context of ethical dilemmas that arise relating to organisational ethics and corporate culture and when rendering professional services	Evaluated
Expected level: Level 1 Evaluator rating: Level 2		

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.

Fill in the below field, Assessor 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"

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Feedback summaryAcademic recordTechnical experienceProficiency in PVAA'sDevelopment planConclude

Back<>

I - Ethics, values and attitudes

1 - Personal ethics

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

No rating yetExpected level at this PDSLevel 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

Evaluator rating

Path CLevel 2

Development required

No

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

Evaluator feedback

Trainee has achieved expected level of proficiency

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

Assessor

Available actions:AcceptRequest re-evaluation

Assessor rating

Decision Tree

-

Rating achieved at previous PDS:No rating yet

Expected level of proficiency:Level 2

SAICA final required level:Level 3

Final required level of proficiency achieved

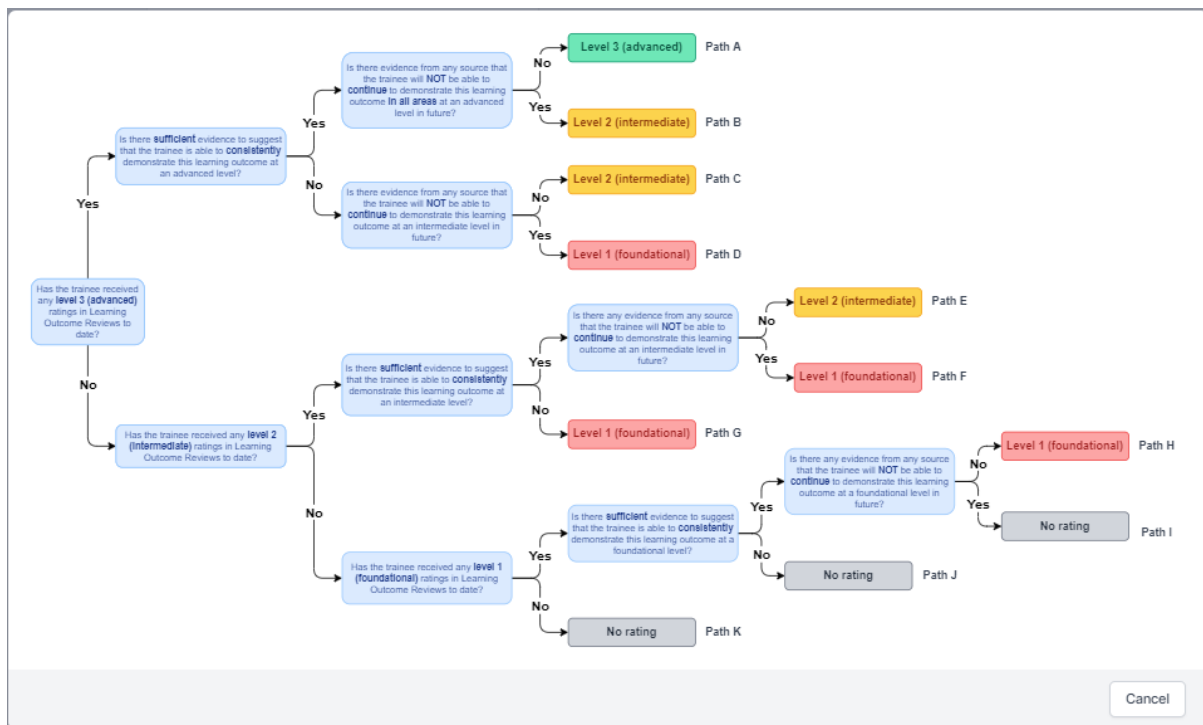
No

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.

CancelSave

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



Reflection is required for all learning outcomes that require development.

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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
Accepted

Expected level: Level 2 Evaluator rating: Level 2 Assessor rating: Level 3

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
Accepted

Expected level: Level 2 Evaluator rating: Level 2 Assessor rating: Level 2

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

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Development plan

Z - Business acumen

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

Accepted

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:	Trainee has achieved expected level of proficiency

Select “**Submit**” to send Professional Development Summary to finalise the PDS.

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Submit to Trainee to finalise the PDS

Submit