

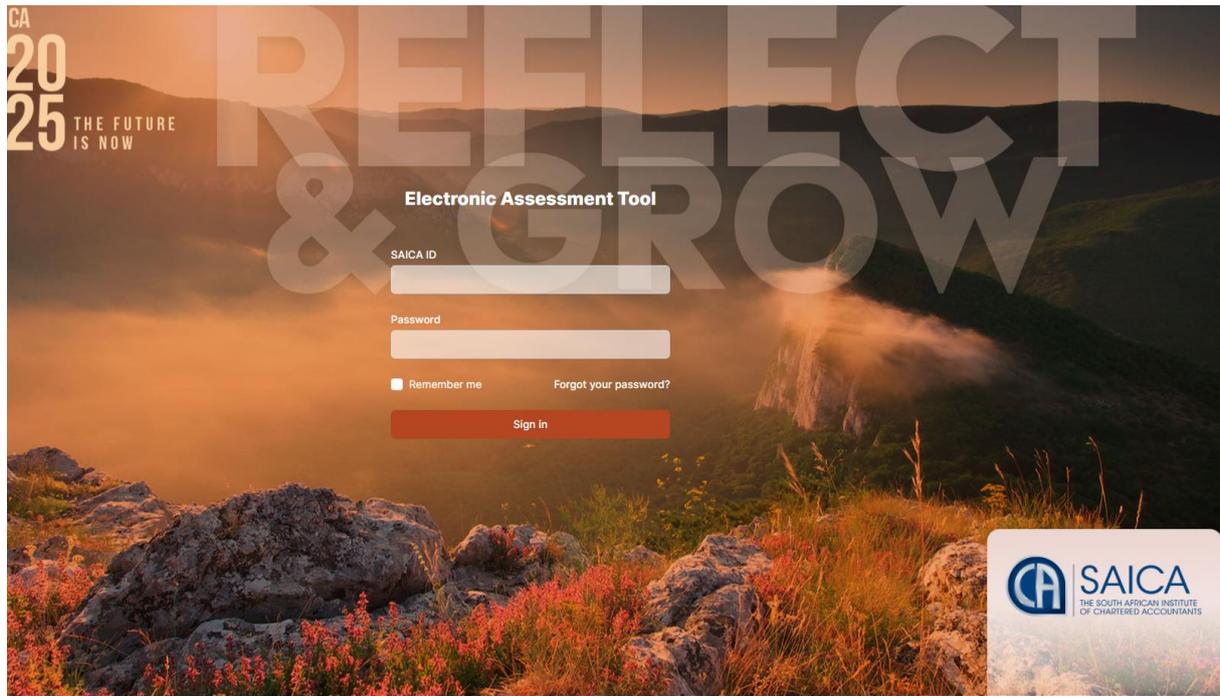


CA2025 TRAINING PROGRAMME

Electronic Assessment Tool

EAT Trainee Navigation

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



The dashboard is the first screen displayed after trainee logges into the assessment tool, please note that you may click on “**Dashboard**” located at the right-hand side of the screen for a full overview of the Learning outcome reviews and professional development summaries in progress.

Dashboard

Overview

Expected levels of proficiency
0 / 49

For this PDS cycle:

- 0 achieved
- 49 outstanding



[View details](#)

Integrated exposure plan
0 / 6

Exposures required for this PDS cycle:

- 0 documented in current PDS cycle
- 0 documented in previous PDS cycles
- 6 pending for current PDS cycle



[View details](#)

Learning Outcome Reviews in progress

[Create LOR](#)

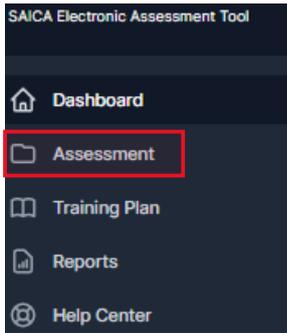
STATUS	DETAILS
Reviewed	Rotation 1 to Financial Management Team
2021-11-08	

Action required

Professional Development Summaries in progress

[Create PDS](#)

STATUS	DETAILS
No Professional Development Summaries	



The below appears when “**Assessment**” is selected. Please note that all feedback will be displayed in highlighted area for both PDS’s and LOR’s.

Assessment Instruments

[Learning Outcome Reviews](#) [Professional Development Summaries](#)

Create LOR + All roles ▾

SUBMITTED	TRAINEE	DETAILS	STATUS
2022-02-03	Betty Champlin	Rotation 1 to Financial Management Team Reviewed by Betty Champlin	Action required 2022-02-03

Click on highlighted “**Professional Development Summaries**” to view all submitted PDS’s.

Assessment Instruments

[Learning Outcome Reviews](#) [Professional Development Summaries](#)

Create PDS + All roles ▾

SUBMITTED	TRAINEE	DETAILS	STATUS
2022-02-10	Betty Champlin	2022-01-01 to 2022-06-30	Finalised 2022-02-11

Click on the dropdown to filter between different roles.

Assessment Instruments

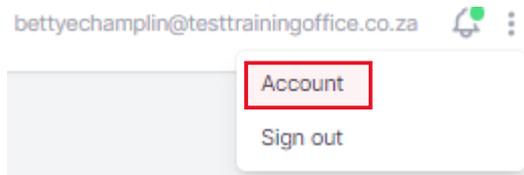
[Learning Outcome Reviews](#) [Professional Development Summaries](#)

Create PDS + All roles ▾

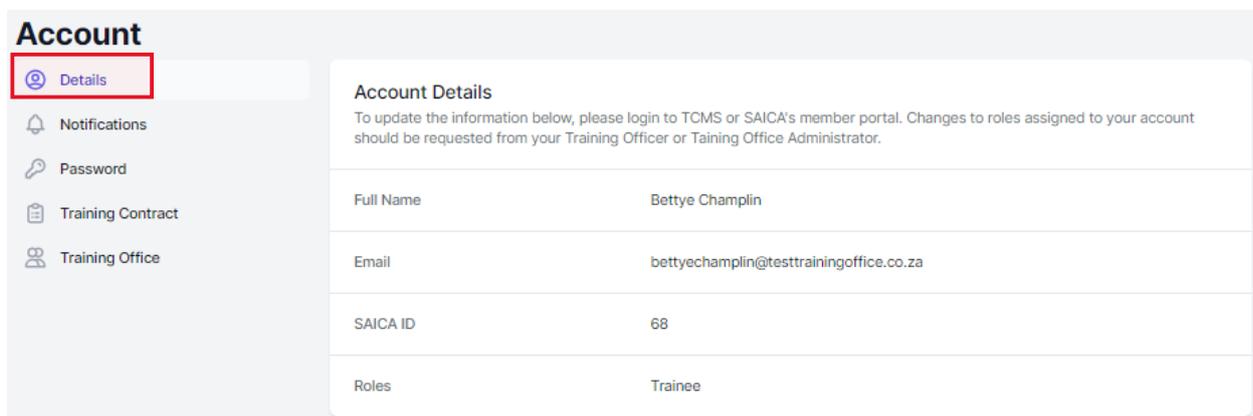
SUBMITTED	TRAINEE	DETAILS
2022-02-10	Betty Champlin	2022-01-01 to 2022-06-30

- All roles ✓
- Trainee
- Evaluator
- Assessor

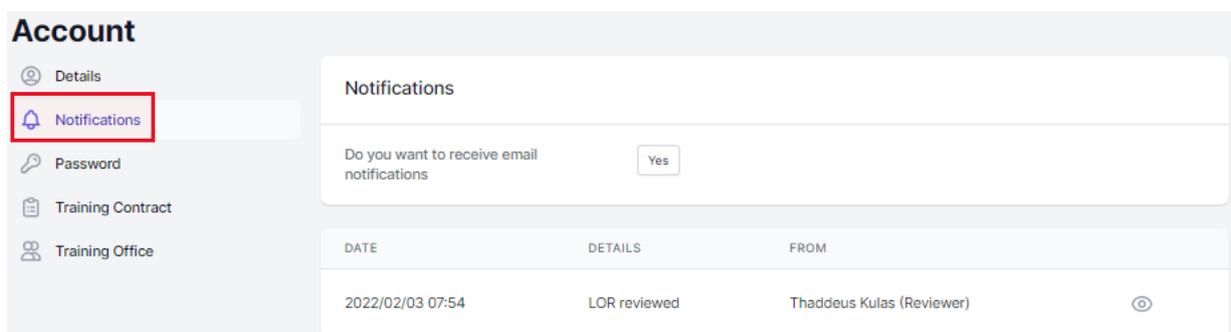
Navigate to the top right-hand corner of EAT screen, Click on “**Account**”.



Select “**Details**” to view trainees account details.



Select “**Notifications**” to view notifications and enable receive email notifications from the EAT.



Select **“Password”** to change your password, please note that password should be at least 8 characters long.

Account

- Details
- Notifications
- Password**
- Training Contract
- Training Office

Password
Update your password here. Your password should be at least 8 characters long.

Current password

New password

Confirm new password

Save

Select **“Training Contract”** to view details of the trainees training contract.

Account

- Details
- Notifications
- Password
- Training Contract**
- Training Office

Training Contract Information
Details of your Training Contract are listed below.

Assessment start date	2022-01-01
Training Plan	3 year plan
Current PDS period	1 of 6
PDS period length	6 months

Select **“Training Office”** to view the training office details.

Account

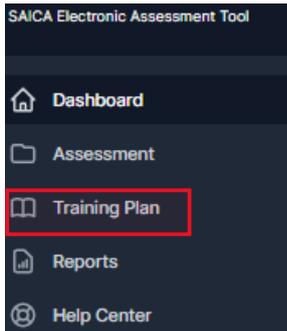
- Details
- Notifications
- Password
- Training Contract
- Training Office**

Training Office Details

Training Office	Test Training Office
Training Officer	Brice Aufderhar - to@to.com

Training office Administrators

NAME	EMAIL
Lyman Runolfsson	toa@to.com
Israel Sauer	israelsauer@testtrainingoffice.co.za
Adolfo Rath	adolforath@testtrainingoffice.co.za
Prudence Nienow	prudencenienow@testtrainingoffice.co.za
Dylan Rogahn	dylanrogahn@testtrainingoffice.co.za



The below appears when “**Training Plan**” is selected. To view the expected level of proficiency in current PDS, click on any of the listed professional values and attributes or enabling acumens.

Training Plan

Current PDS period: 2 / 6

[Expected levels of proficiency](#) Integrated exposure plan

Professional values and attitudes

I - Ethics, values and attitudes	Learning outcomes: 8 >
II - Citizenship, values and attitudes	Learning outcomes: 9 >
III - Lifelong learning, values and attitudes	Learning outcomes: 4 >

Enabling acumen

Z - Business acumen	Learning outcomes: 11 >
Y - Decision-making acumen	Learning outcomes: 11 >
X - Relational acumen	Learning outcomes: 25 >
W - Digital acumen	Learning outcomes: 27 >

The below appears when professional values and attributes or enabling acumens are selected.

Training Plan

Current PDS period: 2 / 6

[Expected levels of proficiency](#) Integrated exposure plan

Back < >

Professional values and attitudes

I - Ethics, values and attitudes

I1 - Personal ethics

a) Act honestly and demonstrate personal integrity, accountability and trustworthiness including while interacting with others	PDS 1	PDS 2	PDS 3	PDS 4	PDS 5	PDS 6
	2	2	2	3	3	3
SAICA required level at end of training contract: Level 3						
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	PDS 1	PDS 2	PDS 3	PDS 4	PDS 5	PDS 6
	2	2	2	3	3	3
SAICA required level at end of training contract: Level 3						

Click on highlighted “**integrated exposure plan**” to view the expected level of proficiency and implimentaion strategy.

Training Plan

Current PDS period: 2 / 6

Expected levels of proficiency [Integrated exposure plan](#)

- 1. Rotation - Financial Reporting:** Financial management and reporting support Provide financial management support and financial reporting support to the business units and group entities by:
 - Compiling information for the Annual Financial Statements (AFS);
 - Performing reconciliations of major account balances, including moveable and immovable assets; irregular expenditure, prepayments and advances; commitments; etc.
 - Compiling working papers substantiating figures in the AFS across both primary and secondary information;
 - Providing technical assistance for accounting for difficult/complex transactions;
 - Assisting with legislative/regulatory disclosures ;
 - Assisting with other reporting requirements (eg: events after reporting date, contingent assets/liabilities, related parties, etc.).

Inputs **1** Business activities **5** Outputs leading to outcomes **2**
- 2. Understanding of the entity (Pervasive understanding):** The trainee will gain understanding of the entity, and its environment by performing the following as examples: Complete the “Understanding of the entity” (document 1300) and will document in detail their understanding of the client’s:
 - Nature of entity
 - Industry
 - Regulatory environment
 - Corporate governance
 - Accounting framework and policies
 - Competitive environment
 - Strategy and business risk
 - Sources of finance
 Complete the Information store document with the information such as:
 - Company name
 - Type of entity
 - Industry in which the entity operates
 - Directors’ details
 - Auditor’s details
 - Company secretary details
 Prepare/Evaluate a minutes of meetings summary, detailing agenda items of importance to the audit, corporate governance issues and risks noted from reading through the minutes.

Inputs **10** Business activities **4** Outputs leading to outcomes **4**
- 3. Perform substantive test of detail on classes of transactions - Revenue:**
 - Sample selection
 - Completing audit procedures
 - Investigating evidence obtained / discrepancies

Inputs **0** Business activities **3** Outputs leading to outcomes **6**

The below appears when is selected.

Training Plan

Current PDS period: 2 / 6

Expected levels of proficiency [Integrated exposure plan](#)

Back < >

Task details

Rotation - Financial Reporting: Financial management and reporting support Provide financial management support and financial reporting support to the business units and group entities by:

- Compiling information for the Annual Financial Statements (AFS);
- Performing reconciliations of major account balances, including moveable and immovable assets; irregular expenditure, prepayments and advances; commitments; etc.
- Compiling working papers substantiating figures in the AFS across both primary and secondary information;
- Providing technical assistance for accounting for difficult/complex transactions;
- Assisting with legislative/regulatory disclosures ;
- Assisting with other reporting requirements (eg: events after reporting date, contingent assets/liabilities, related parties, etc.).

A2 - Business strategy
3 - Implementing strategy

b) Identify and evaluate significant business risks, strengths, weaknesses, opportunities and threats associated with the organisation’s external and internal environments

PDS periods					
1	2	3	4	5	6
●	●	●	●	●	●

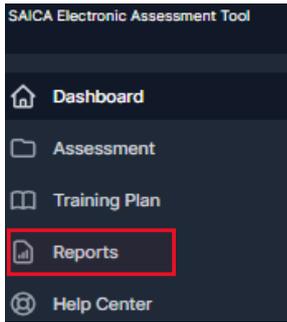
B1 - Reporting fundamentals
- Fundamental reporting concepts

a) Identify users’ needs and develop a reporting approach by selecting suitable reporting and regulatory framework(s) which satisfies most users’ needs in general purpose reporting by applying: (i) The fundamental theories related to reporting (ii) The objective, usefulness and limitations of the available reporting frameworks (iii) The objective, nature and characteristics of regulatory frameworks and requirements

PDS periods					
1	2	3	4	5	6
●	●	●	●	●	●

b) Apply the qualitative characteristics and principles of useful information

PDS periods					
1	2	3	4	5	6
●	●	●	●	●	●



The below appears when “**Reports**” is selected to view trainee’s proficiency in the Learning outcomes to date compared to Expected Levels of Proficiency in the assigned Training Plan.

Reports

Expected levels of proficiency Integrated exposure plan

Expected at next PDS

Expected levels of proficiency
Trainee proficiency in the Learning outcomes to date compared to Expected Levels of Proficiency in the assigned Training Plan.

LEARNING OUTCOME	CURRENT RATING	EXPECTED LEVEL	CURRENT PERIOD
I - Ethics, values and attitudes 2 b) Demonstrate how you contributed to the ethical culture of your business environment	Level 1	Level 2	-
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 1	-
II - Citizenship, values and attitudes 3 b) Evaluate, the impact of an action taken by a professional individual (yourself or someone else) on public interest, the profession and on society	-	Level 1	-
Z - Business acumen 2 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	Level 0	Level 1	-

Marked for development

Click on the highlighted to filter to different view such as Expected at next PDS, Development required, On track, Final level achieved and All.

Reports

Expected levels of proficiency Integrated exposure plan

Expected at next PDS

Expected levels of proficiency
Trainee proficiency in the Learning outcomes to date compared to Expected Levels of Proficiency in the assigned Training Plan.

LEARNING OUTCOME	CURRENT RATING	EXPECTED LEVEL	CURRENT PERIOD
I - Ethics, values and attitudes 2 b) Demonstrate how you contributed to the ethical culture of your business environment	Level 1	Level 2	-
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 1	-

- Expected at next PDS
- Development required
- On track
- Final level achieved
- All

Select “**Integrated Exposure Plan Progress**” to view the Progress against your integrated exposure plan is set out below.

Reports

Expected levels of proficiency [Integrated exposure plan](#)

Expected at next PDS ▾

Integrated exposure plan progress
Progress against your integrated exposure plan is set out below.

LEARNING OUTCOME	EXPOSED TO IN CURRENT PDS PERIOD	TOTAL EXPOSURES
A1 - Governance model 3 b) Evaluate the participation of internal audit in an organisation's combined assurance process	-	0
A2 - Business strategy 3 b) Identify and evaluate significant business risks, strengths, weaknesses, opportunities and threats associated with the organisation's external and internal environments	-	0
A3 - Aligning the business model with the business strategy 2 b) Assess the organisational pursuit of, and responses to disruptive business models	-	0
A3 - Aligning the business model with the business strategy 3 g) Identify the entity's material impact on environmental, economic and social systems and consequently identifies any risks relating to the entity's continuity	-	0
B1 - Reporting fundamentals 1 a) Identify users' needs and develop a reporting approach by selecting suitable reporting and regulatory framework(s) which satisfies most users' needs in general purpose reporting by applying: (i) The fundamental theories related to reporting (ii) The objective, usefulness and limitations of the available reporting frameworks (iii) The objective, nature and characteristics of regulatory frameworks and requirements	-	0
B1 - Reporting fundamentals 1 b) Apply the qualitative characteristics and principles of useful information	-	0

Click on the drop down to view what is expected at the next PDS or all.

Reports

Expected levels of proficiency [Integrated exposure plan](#)

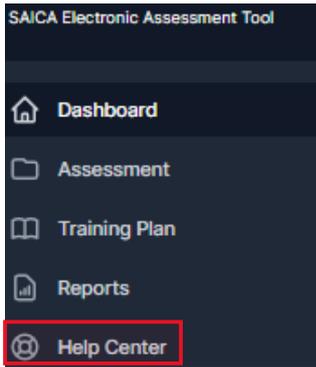
Expected at next PDS ▾

Integrated exposure plan progress
Progress against your integrated exposure plan is set out below.

Expected at next PDS ✓

All

LEARNING OUTCOME	EXPOSED TO IN CURRENT PDS PERIOD	TOTAL EXPOSURES
A1 - Governance model 3 b) Evaluate the participation of internal audit in an organisation's combined assurance process	-	0
A2 - Business strategy 3 b) Identify and evaluate significant business risks, strengths, weaknesses, opportunities and threats associated with the organisation's external and internal environments	-	0



The below appears when “**Help Center**” tab is selected. To view available guidance please use highlighted search field below or alternatively nevgate to the bottom of the screen where a list of published guidance will be displayed.

A screenshot of the SAICA Electronic Assessment Tool Help Center page. The page has a blue header with the SAICA logo and 'Electronic Assessment Tool' text on the left, and 'Submit a request' and 'Sign in' links on the right. The main content area has a blue background with the text 'HELP CENTER' in white. Below this is a search bar with a magnifying glass icon and the word 'Search'. Underneath the search bar is a white box containing the text 'FAQ'. Below that is a section titled 'Recent activity' which contains a list of three FAQ entries. Each entry includes the title, a description, and the date 'Article created 19 days ago' with a comment icon and the number '0'. The search bar and the 'Recent activity' list are highlighted with red rectangular borders.