

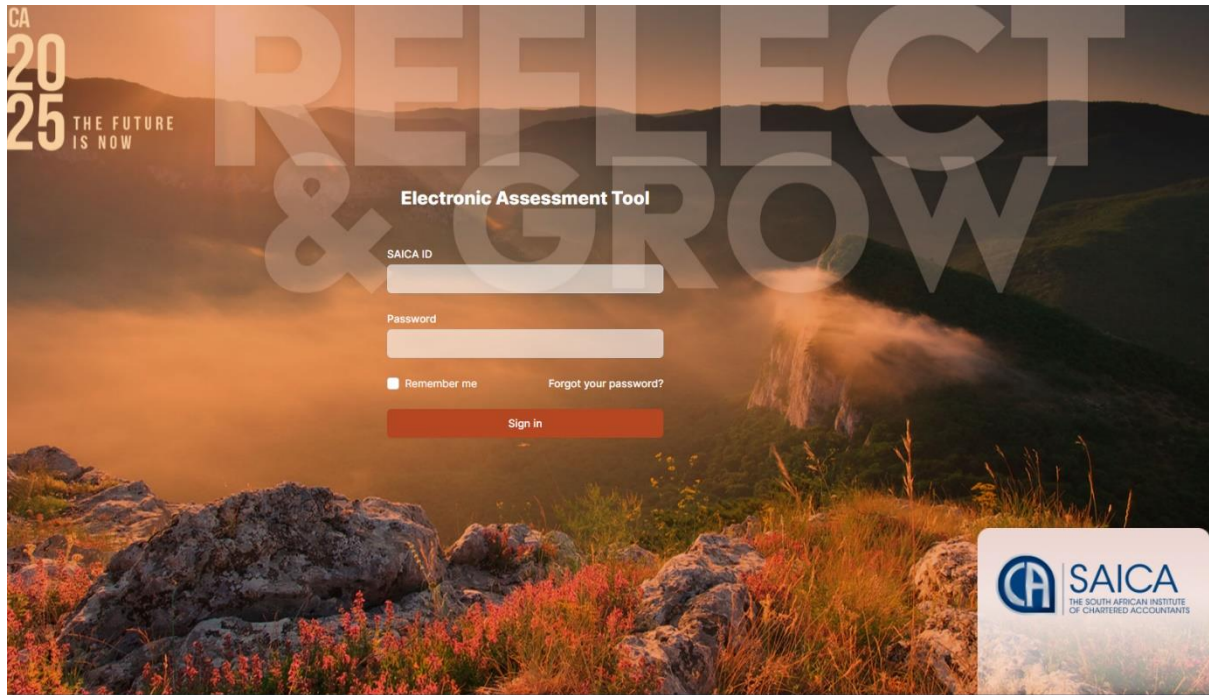


CA2025 TRAINING PROGRAMME

Electronic Assessment Tool

EAT Training Office Navigation

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



The below appears when “Dashboard” tab is selected, click on “Activate trainee accounts” to view the list on inactive trainees. Please note that clicking on “view details” will direct you to the trainee compliance page where the number of trainees that did not submit a Learning outcome review during the month will be displayed.

Dashboard

Overview

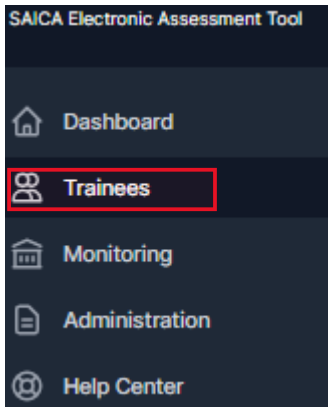
<p>Inactive trainee accounts</p> <p>9</p> <p>9 new trainee account(s) created from TCMS. Please activate these accounts.</p> <p>Activate trainee accounts</p>	<p>October 2021 - Compliance status</p> <p>54</p> <p>54 trainee(s) have not yet submitted a Learning outcome review for October 2021.</p> <p>View details</p>
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Click on the highlighted to activate trainee.

Inactive trainees

Search

NAME	SAICA ID	CREATED FROM TCMS	
Bobette Leffler bobetteleffler@testtrainingoffice.co.za	65	14 days ago	🔗
Georgie Cummings georgiecummings@testtrainingoffice.co.za	66	14 days ago	🔗






The below appears when “**Trainee**” tab is selected, please click on highlighted to view the trainee’s details.

Trainees 7 Inactive trainees

Active Discharged Cancelled

Search All trainees

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST PDS SUBMISSION DATE	
Abram Torp abramtorp@testtrainingoffice.co.za	1 / 6	2021-08-01	3 year plan	-	
Alec O’Kon alecokon@testtrainingoffice.co.za	1 / 6	2021-11-01	3 year plan	-	
Alfonso Blick alfonsoblick@testtrainingoffice.co.za	1 / 6	2021-08-01	3 year plan	-	

Please note that you may click on “**Discharged**” or “**Cancelled**” to view trainees that have been discharged or contract has been cancelled.

Trainees 7 Inactive trainees

Active **Discharged** Cancelled

Search All trainees

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST PDS SUBMISSION DATE
No result				

Click on the dropdown to filter trainees.

Trainees

7 Inactive trainees

Active Discharged Cancelled

Search

All trainees

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST	
Abram Torp abramtorp@testtrainingoffice.co.za	1 / 6	2021-08-01	3 year plan	-	All trainees ✓
Alec O'Kon alecokon@testtrainingoffice.co.za	1 / 6	2021-11-01	3 year plan	-	3 year plan
Alfonso Blick alfonsoblick@testtrainingoffice.co.za	1 / 6	2021-08-01	3 year plan	-	4 Feb Demo 1
Alfred Williamson alfredwilliamson@testtrainingoffice.co.za	1 / 12	2022-02-01	4 year plan	-	4 Feb Demo Duplicate
Anibal Prohaska anibalprohaska@testtrainingoffice.co.za	1 / 20	2022-02-01	5 year plan	-	4 year plan
Aretha Grant arethagrant@testtrainingoffice.co.za	1 / 20	2021-08-01	5 year plan	-	5 year plan

- Feb demo 2
- GOR Training Plan
- Test Training plan 3 year (KV)

Once trainee has been selected, the trainees' details and training contract information will be displayed.

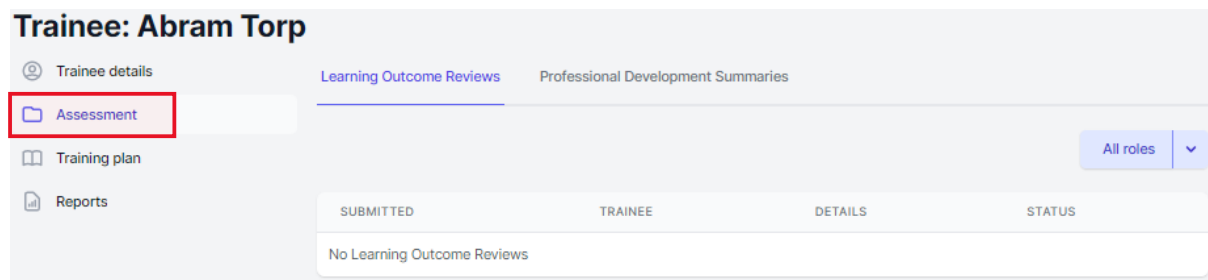
Trainee: Abram Torp

- Trainee details**
- Assessment
- Training plan
- Reports

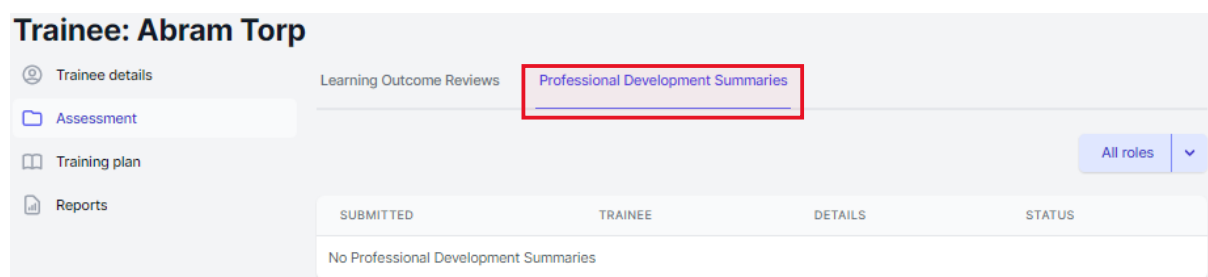
Trainee details	
Full Name	Abram Torp
Email	abramtorp@testtrainingoffice.co.za
SAICA ID	35
Roles	Trainee

Training Contract Information	
Assessment start date	2021-08-01
Training Plan	3 year plan
Current PDS period	1 / 6
PDS period length	6 months

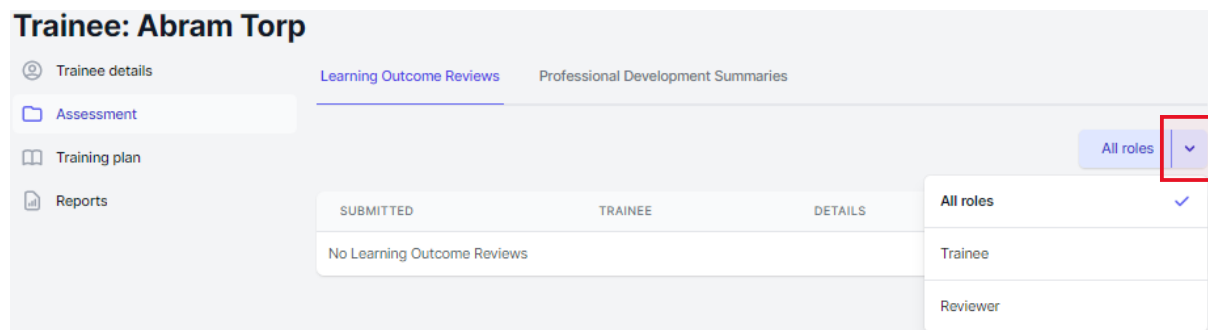
Select “**Assessment**” to view learning outcome review or professional development summaries submitted by the trainee.



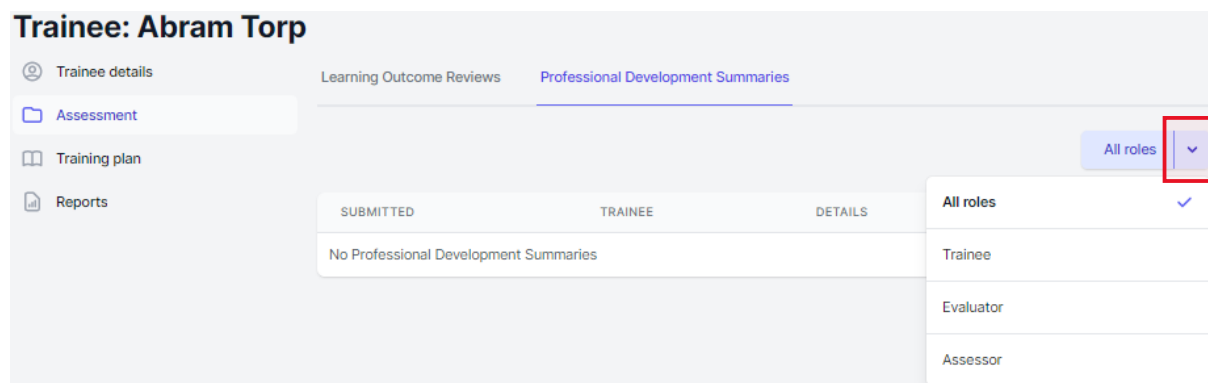
Please note that you may view professional development summaries submitted by the trainee by clicking on highlighted area.



Click on the dropdown to filter between different roles.



Click on the dropdown to filter between different roles.



Select “**Training Plan**” to view the details for training plan assigned to the trainee. Select any of the below integrated exposure plan tasks.

Trainee: Abram Torp

- Trainee details
- Assessment
- Training plan**
- Reports

Integrated exposure plan Expected levels of proficiency

- Deleniti voluptatem et. Molestiae aspernatur voluptas. Repellendus ea atque. Non aut ea. Corporis voluptate facere. Voluptate autem dolores. Aspernatur harum magni. Voluptatem quas rem. Aut voluptates est. Ut voluptatum voluptates. Debitis deleniti et. Maxime cum aut.
 - Inputs 2 Business activities 2 Outputs leading to outcomes 0
- Quos voluptas qui. Eius libero dolore. Suscipit inventore minima. Et eos quia. Omnis quis velit.
 - Inputs 2 Business activities 1 Outputs leading to outcomes 1
- Et dolores harum. Explicabo id in. Pariatur quas rerum. Aperiam suscipit unde. Voluptas est dolores.
 - Inputs 2 Business activities 2 Outputs leading to outcomes 1

The below appears when integrated exposure plan task is selected.

Trainee: Abram Torp

- Trainee details
- Assessment
- Training plan**
- Reports

Integrated exposure plan Expected levels of proficiency

Task details

Deleniti voluptatem et. Molestiae aspernatur voluptas. Repellendus ea atque. Non aut ea. Corporis voluptate facere. Voluptate autem dolores. Aspernatur harum magni. Voluptatem quas rem. Aut voluptates est. Ut voluptatum voluptates. Debitis deleniti et. Maxime cum aut.

A3 - Aligning the business model with the business strategy
2 - Disruptive business models

b) Assess the organisational pursuit of, and responses to disruptive business models

PDS periods					
1	2	3	4	5	6
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

A4 - Finance strategy
3 - Appraise the finance strategy

a) Assess models used to appraise the organisation's finance strategy; ensure that it is aligned with the organisation's value creation objective, supports business need and ensures appropriate resources are allocated

PDS periods					
1	2	3	4	5	6
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

B3 - Risk management and control
2 - Control systems and processes

a) Assess the organisation's control frameworks and control policies across the organisation to determine effectiveness in achieving its business objectives and value creation: (i) IT general controls such as change management, access, computer operations, business continuity management and disaster recovery planning, systems development life cycle, cyber security (ii) IT application controls and the corollary impact on the organisations' reporting objectives (including risk of misstatements of account balances, class of transactions and disclosures.)

PDS periods					
1	2	3	4	5	6
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

C4 - Use of derivatives
2 - Instruments

b) Identify the need for, and evaluates on a preliminary basis, the usefulness of forward and future contracts, swaps, put and call options (including warrants) and other derivatives, in meeting the entity's objectives and staying within its risk tolerance level.

PDS periods					
1	2	3	4	5	6
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Back Next task

Select **“Expected levels of proficiency”** to view Professional values and attitudes or acumen. Select any of the below

Trainee: Abram Torp

Integrated exposure plan **Expected levels of proficiency**

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 integrated exposure plan task is selected. Please note that you may use that highlighted to navigate between different Professional values and attitudes or acumen.

Trainee: Abram Torp

Integrated exposure plan **Expected levels of proficiency**

Back < >

Professional values and attitudes

II - Citizenship, values and attitudes

II1 - Personal citizenship

a) Demonstrate a responsive, valuing and tolerant approach to cultural diversity (local or global) and individual differences

PDS 1	PDS 2	PDS 3	PDS 4
2	2	2	2
PDS 5	PDS 6		
2	3		

SAICA required level at end of training contract: **Level 3**

b) Evaluate, for a specific course of action, its impact on the community in which you live and work, and on the local environment

PDS 1	PDS 2	PDS 3	PDS 4
0	0	0	2
PDS 5	PDS 6		
2	3		

SAICA required level at end of training contract: **Level 3**

Select “**Reports**” to view the Trainee proficiency in the Learning outcomes to date compared to Expected Levels of Proficiency in the assigned Training Plan.

Trainee: Abram Torp

Trainees

Expected levels of proficiency Integrated exposure plan

Reports

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 3 b) By way of general conduct, demonstrate a commitment to the ethical values upheld by the profession	-	Level 1	-
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	-
II - Citizenship, values and attitudes 2 a) Identify relevant stakeholders in your business environment (for either a client or your training office)	-	Level 2	-
III - Lifelong learning, values and attitudes 1 a) Demonstrate life-long learning by staying abreast of current trends and emerging issues including in relation to digital developments	-	Level 1	-

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

Trainee: Abram Torp

Trainees

Expected levels of proficiency Integrated exposure plan

Reports

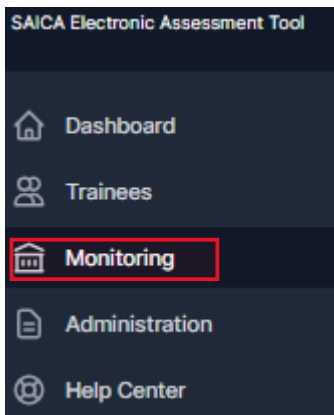
Expected at next PDS

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 3 b) By way of general conduct, demonstrate a commitment to the ethical values upheld by the profession	-	Level 1	-
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	-


Expected at next PDS

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




The below appears when “**Monitoring**” is selected.

Monitoring



Assessments In Process
Identify assessments that requires action



Compliance
Review your training office's compliance

The below appears when “**Assessments in process**” is selected. Identify assessments that requires action.

Assessments in process

TYPE	TRAINEE	INITIAL SUBMISSION DATE	AT USER	IDLE SINCE
No result				

The below appears when “**Compliance**” is selected. This report sets out the number of trainees that did not submit a Learning outcome review during the month.

Trainee compliance

This report sets out the number of trainees that did not submit a Learning outcome review during the month.


2022 ▾

MONTH	# OF TRAINEES
January	37
February	53
March	0
April	0


Click on the drop down to filter between the different years.

Trainee compliance

This report sets out the number of trainees that did not submit a Learning outcome review during the month.

2022 

MONTH	# OF TRAINEES
January	37
February	54

2022 


2021




2020

Click on highlighted **“view”** the number of trainees that did not submit a learning outcome review during the month.

Trainee compliance

This report sets out the number of trainees that did not submit a Learning outcome review during the month.

2022 

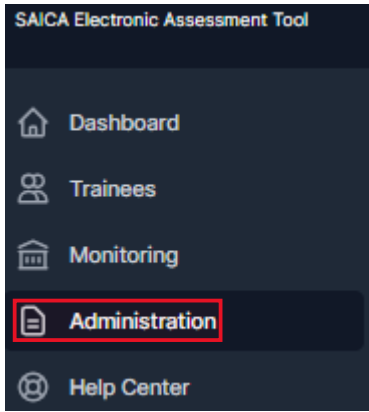
MONTH	# OF TRAINEES	
January	37	
February	53	
March	0	

Click on highlighted to view the trainees details.

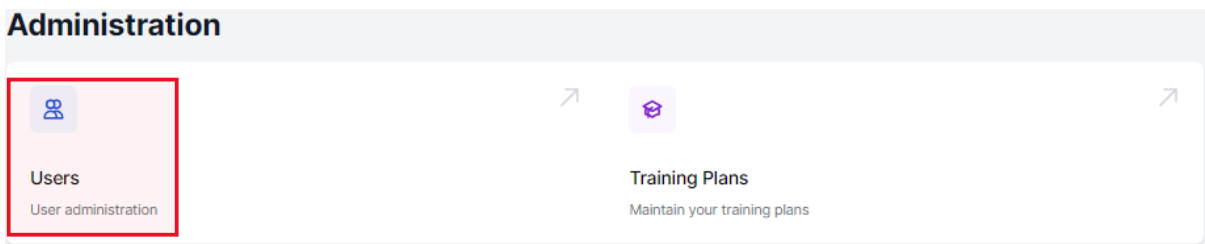
Training compliance - January 2022

Trainees that did not or have not yet submitted a Learning outcome review for this month, are listed below.

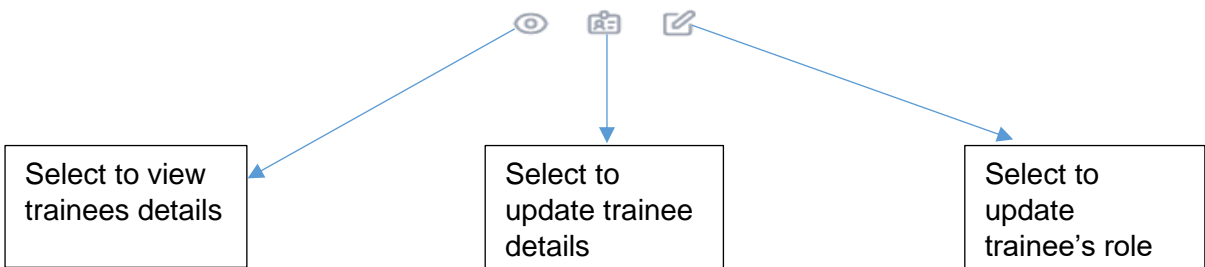
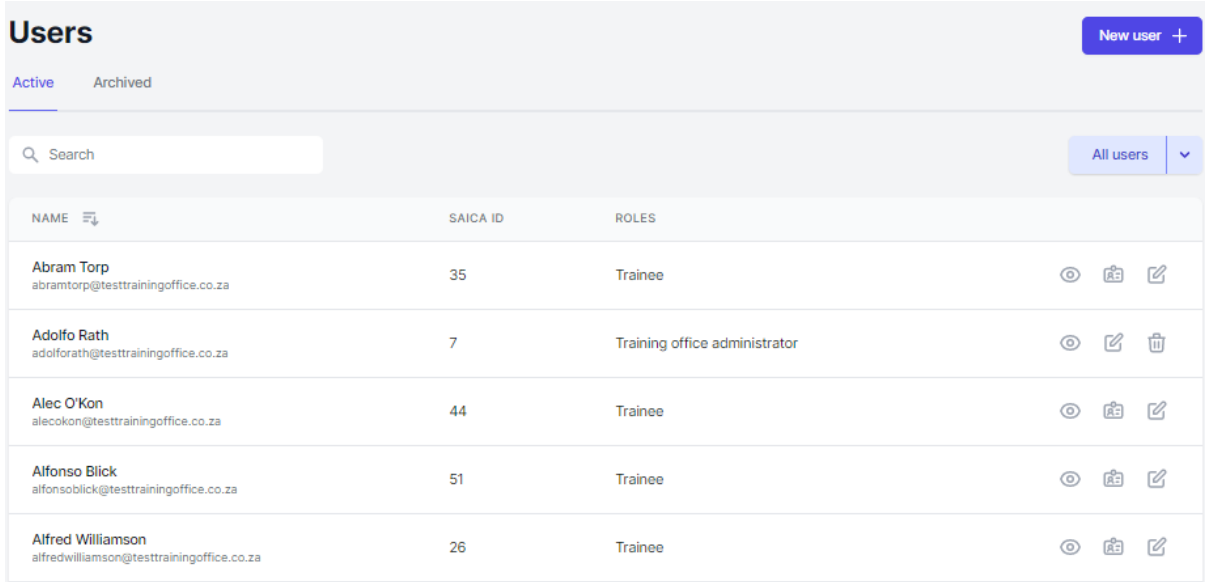
NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST PDS SUBMISSION DATE	
Abram Torp	1 / 6	2021-08-01	3 year plan	-	
Alec O'Kon	1 / 6	2021-11-01	3 year plan	-	
Alfonso Blick	1 / 6	2021-08-01	3 year plan	-	



The below appears when “**Administrator**” is selected.



The below list of users appears when “**Users**” is selected.



Click on the highlighted to filter to different roles.

The screenshot shows the 'Users' management interface. At the top right is a 'New user +' button. Below it are tabs for 'Active' and 'Archived'. A search bar is present. A dropdown menu is open, showing a list of roles: 'All users' (selected), 'Assessors', 'Evaluators', 'Moderators', 'Reviewers', 'Trainees', 'Training Office administrators', and 'Training Officer'. The main table lists users with columns for NAME, SAICA ID, and ROLES.

NAME	SAICA ID	ROLES
Abram Torp abramtorp@testtrainingoffice.co.za	35	Trainee
Adolfo Rath adolforath@testtrainingoffice.co.za	7	Training office administrator
Alec O'Kon alecokon@testtrainingoffice.co.za	44	Trainee
Alfonso Blick alfonsoblick@testtrainingoffice.co.za	51	Trainee
Alfred Williamson alfredwilliamson@testtrainingoffice.co.za	26	Trainee
Allene Morissette e@to	95	Evaluator

Select "Archived" to view

The screenshot shows the 'Users' management interface with the 'Archived' tab selected. The main table area displays 'No result'.

Select "New user" to create new user.

The screenshot shows the 'Users' management interface. The 'New user +' button is highlighted with a red box. The 'Active' tab is selected, and the table shows one user: Abram Torp.

NAME	SAICA ID	ROLES
Abram Torp abramtorp@testtrainingoffice.co.za	35	Trainee

The below appears when “**New user**” is selected. Enter the user’s SAICA ID to continue.

Create a new User
Enter the user's SAICA ID to continue.

SAICA ID

Please enter SAICA ID and click save to proceed.

Create a new User
Enter the user's SAICA ID to continue.

SAICA ID

A user with that SAICA ID already exists in this Training Office

Assign user a role and click save to proceed.


Abram Torp (abramtorp@testtrainingoffice.co.za)
Update the roles assigned to the user.

Roles


- Trainee**
SAICA trainee.
- Reviewer**
Can be selected as reviewer on the LOR.

Select **“Training Plans”** to maintain your training plans.

Administration



Users
User administration











Training Plans
Maintain your training plans

The below list of active training plans appears when **“Training Plans”** is selected.

Training plans

New training plan +

Active Archived

NAME	PDS DETAILS	STATUS	
3 year plan	6 periods 6 months per period	Active Trainees: 22	
4 Feb Demo 1	6 periods 6 months per period	Active Trainees: 2	
4 Feb Demo Duplicate	6 periods 6 months per period	Active Trainees: 0	
4 year plan	12 periods 4 months per period	Active Trainees: 10	
5 year plan	20 periods 3 months per period	Active Trainees: 21	
Feb demo 2	6 periods 6 months per period	Active Trainees: 2	
GOR Training Plan	6 periods 6 months per period	Active Trainees: 2	
Test Training plan 3 year (KV)	6 periods 6 months per period	Active Trainees: 0	

Please note that you may select **“Archived”** to view archived training plans.

Training plans

New training plan +

Active **Archived**

NAME	PDS DETAILS	STATUS
No result		

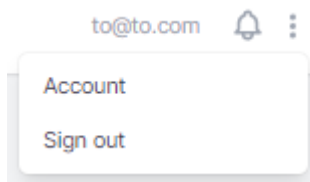
Select **“New training plan”** to create new training plan. Please refer to guidance on uploading a training plan.

Training plans New training plan +

Active Archived

NAME	PDS DETAILS	STATUS
3 year plan	6 periods 6 months per period	Active Trainees: 22
4 Feb Demo 1	6 periods 6 months per period	Active Trainees: 2

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



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

Account

- 👤 Details
- 🔔 Notifications
- 🔑 Password
- 👥 Training Office

Account Details

To update the information below, please login to TCMS or SAICA's member portal. Changes to roles assigned to your account should be requested from your Training Officer or Training Office Administrator.

Full Name	Brice Aufderhar
Email	to@to.com
SAICA ID	4
Roles	Training officer

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

Account

- 👤 Details
- 🔔 Notifications
- 🔑 Password
- 👥 Training Office

Notifications

Do you want to receive email notifications Yes

DATE	DETAILS	FROM
No notifications yet		

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

Account

- Details
- Notifications
- Password**
- 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 Office"** to view the training office details.

Account

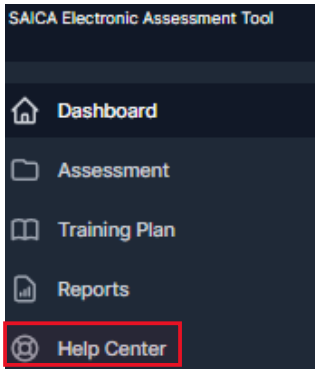
- Details
- Notifications
- Password
- Training Office**

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 “**Help Center**” tab is selected. To view available guidance please use highlighted search field below or alternatively navigate 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'. Further down is a section titled 'Recent activity' with a list of three FAQ articles. Each article entry includes the title, the text 'Article created 19 days ago', and a comment icon with the number '0'. The 'Recent activity' section and the search bar are highlighted with red rectangular borders.