

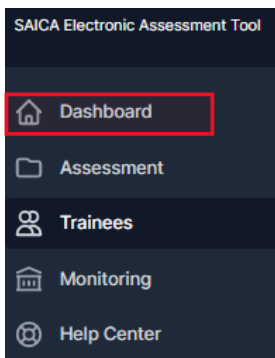
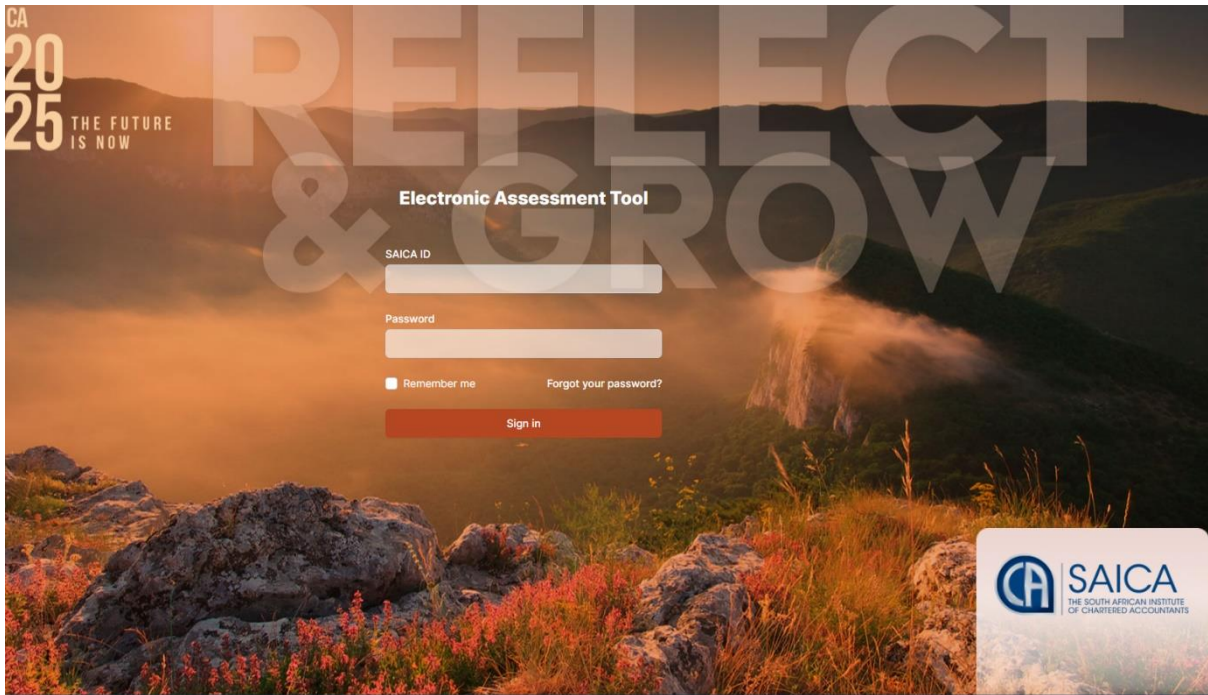


CA2025 TRAINING PROGRAMME

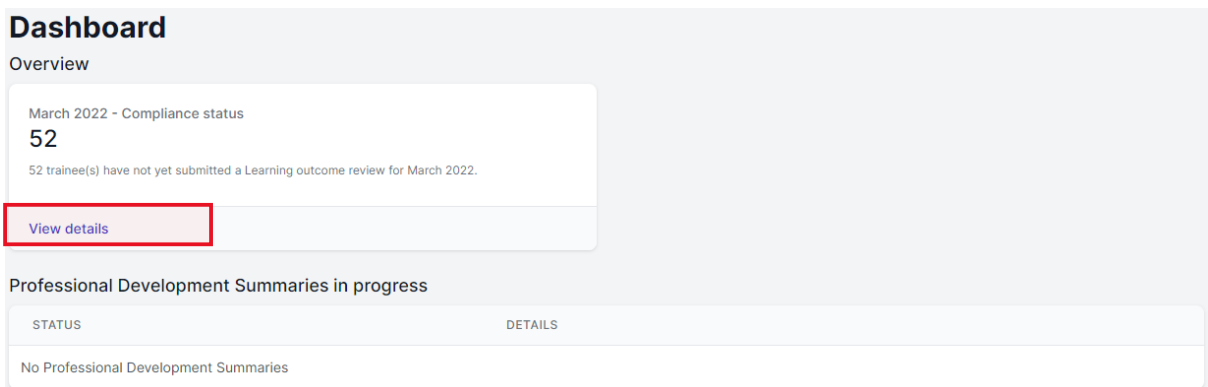
Electronic Assessment Tool

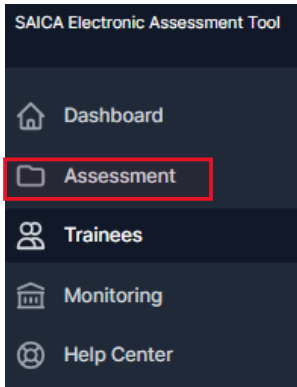
EAT Assessor Navigation

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

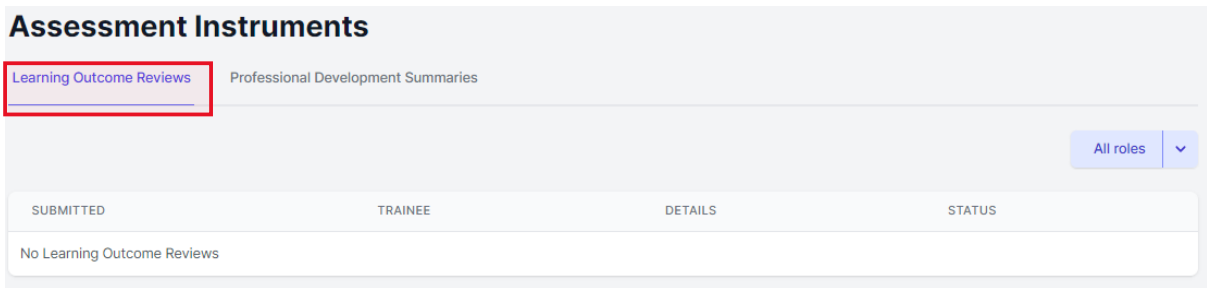


The below appears when “Dashboard” tab is selected. Please note that clicking on “view details” will direct you to the trainee compliance page where the number of trainees that did not submit a Learning outcome review during the month will be displayed.

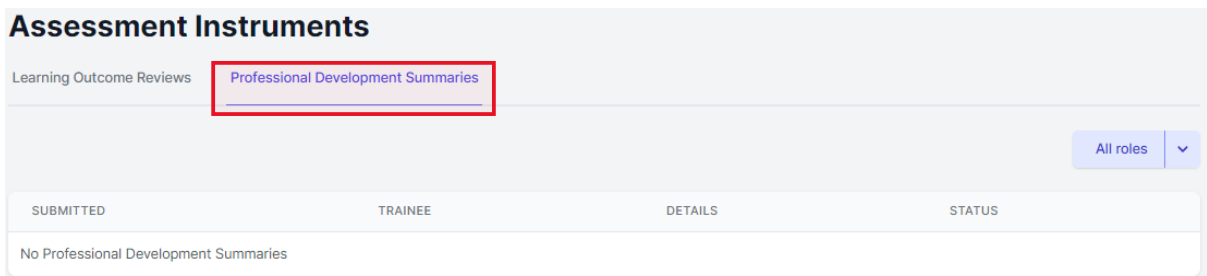




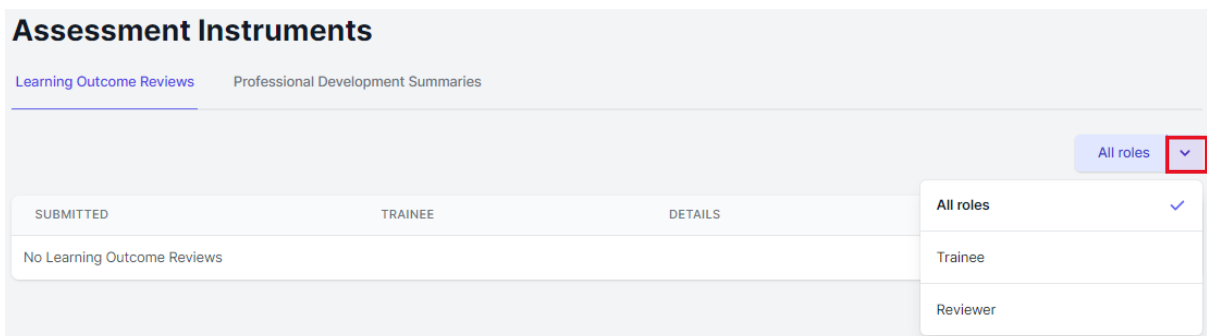
The below appears when “**Assessment**” is selected. Please note that all feedback will be displayed in the highlighted area for both PDS’s and LOR’s.

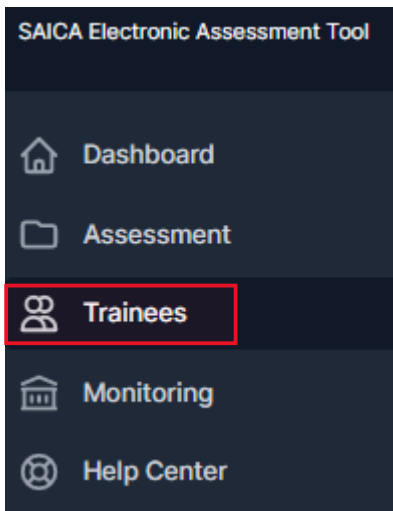


Click on highlighted “**Professional Development Summaries**” to view all submitted PDS’s.



Click on the dropdown to filter between different roles.





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

Trainees

Active Discharged Cancelled

Search All trainees

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST PDS SUBMISSION DATE
[Redacted]	1 / 20	2022-03-01	5 year plan	-
[Redacted]	1 / 12	2021-12-01	4 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

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

Active Discharged Cancelled

Search

All trainees

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST P
Abraham Lemke abrahamlemke@testtrainingoffice.co.za	1 / 20	2022-03-01	5 year plan	-
Althea Hickle altheahickle@testtrainingoffice.co.za	1 / 12	2021-12-01	4 year plan	-
Billy Heidenreich billyheidenreich@testtrainingoffice.co.za	1 / 6	2021-12-01	3 year plan	-
Brittani Schimmel brittanischimmel@testtrainingoffice.co.za	1 / 6	2022-03-01	3 year plan	-
Burton Lesch burtonlesch@testtrainingoffice.co.za	1 / 6	2022-03-01	3 year plan	-
Carlie Wehner carliewehner@testtrainingoffice.co.za	1 / 6	2021-12-01	3 year plan	-
Chester Renner chesterrenner@testtrainingoffice.co.za	1 / 12	2021-09-01	4 year plan	-

- All trainees ✓
- 3 year plan
- 3 year plan - Duplicate 2022-03-28 11:48:39
- 4 year plan
- 5 year plan
- Dawie Test
- KZN test
- Lunga Test Plan
- Lunga Test Plan - Duplicate 2022-03-28 12:04:11

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

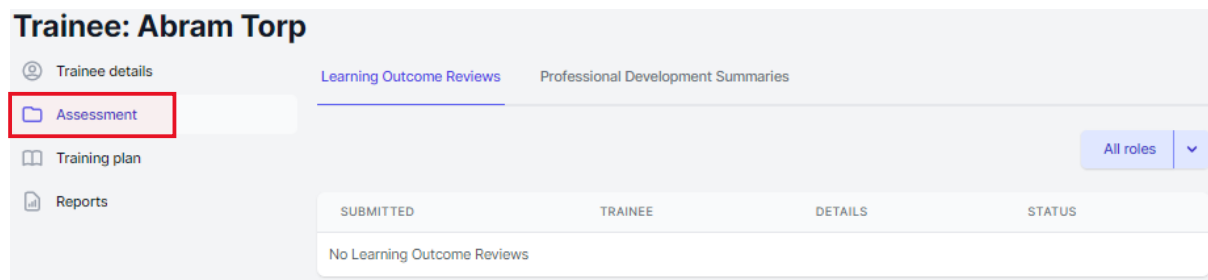
Trainee: Abram Torp

- Trainee details
- Assessment
- Training plan
- Reports

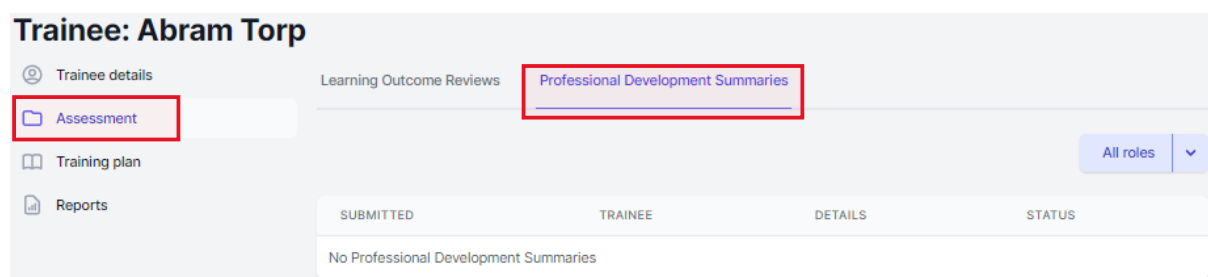
Trainee details	
Full Name	Abram Torp
Email	abramtorp@testtrainingoffice.co.za
SAICA ID	35
Roles	Trainee

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

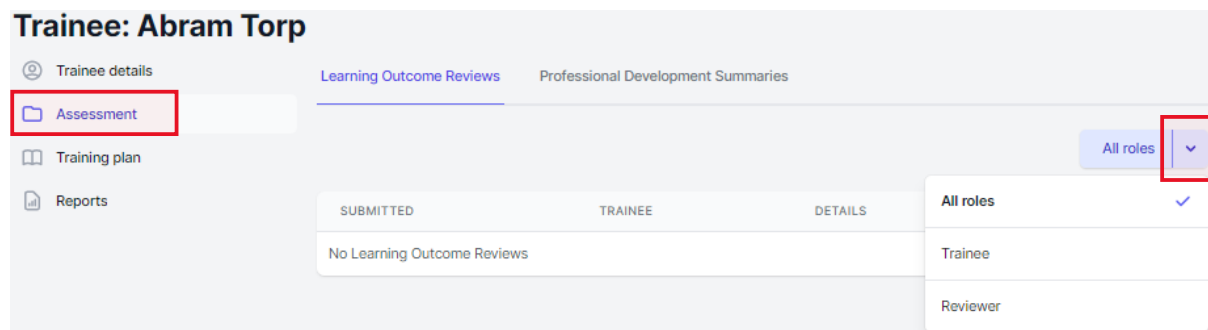
Select “**Assessment**” to view learning outcome review or professional development summaries submitted by the trainee.



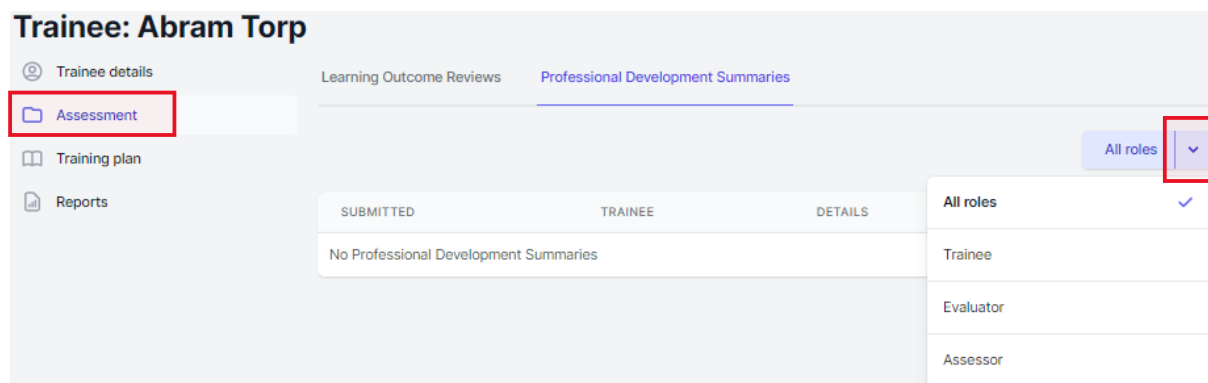
Please note that you may view professional development summaries submitted by the trainee by clicking on highlighted area.



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

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

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

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

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**

[Trainee details](#)
[Assessment](#)
[Training plan](#)
[Reports](#)

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**

[Trainee details](#)
[Assessment](#)
[Training plan](#)
[Reports](#)

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	-

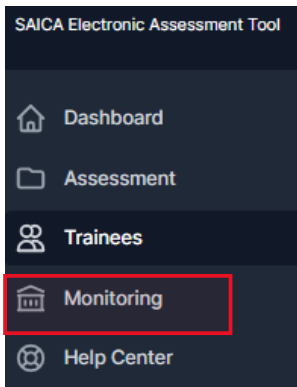
Expected at next PDS

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	2022 
February	54	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	

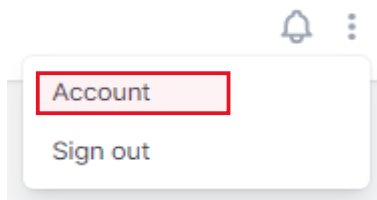
Click on highlighted to view the trainees details.

Training compliance - January 2022

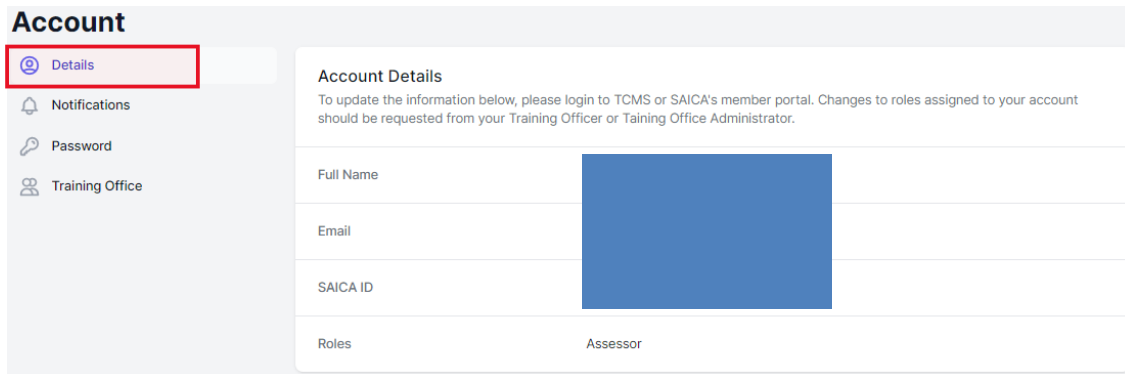
Trainees that did not or have not yet submitted a Learning outcome review for this month, are listed below.

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	-	

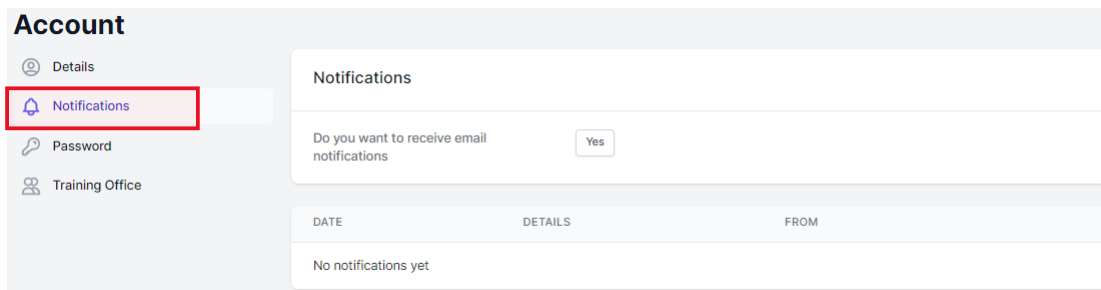
Navigate to the top right-hand corner of EAT screen, Click on “**Account**”.



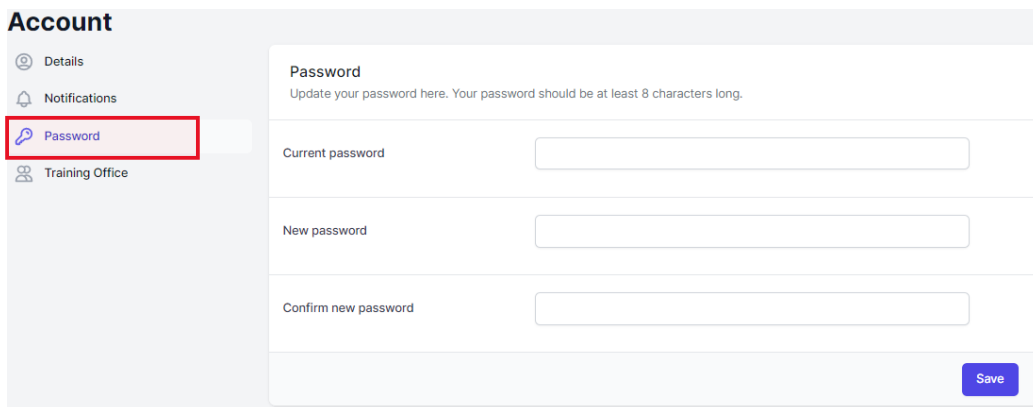
Select “**Details**” to view Reviewer account details.



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.



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

Account

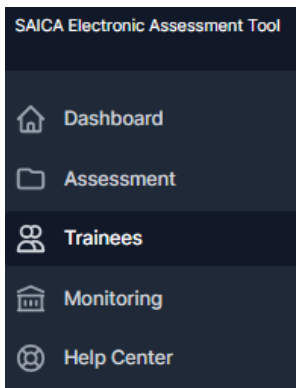
- Details
- Notifications
- Password
- Training Office**

Training Office Details

Training Office	[Redacted]
Training Officer	[Redacted]

Training office Administrators

NAME	EMAIL
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]



The below appears when “**Help Center**” tab is selected. To view available guidance please use highlighted search field below or alternatively select specific role to view published guidance for that role.

A screenshot of the 'HELP CENTER' interface. It features a blue header with the text 'HELP CENTER' and a white search bar with a magnifying glass icon and the text 'Search'. Below the search bar are six white cards with blue borders, each representing a role: Training Officer, Trainee, Reviewer, Assessor, Evaluator, and Moderator. Each card contains a brief description of the role's responsibilities.

HELP CENTER

Search

Training Officer
The 'Training officer' is an individual who is responsible for performing the functions and duties ascribed to a trai...

Trainee
A person who is employed by an accredited training office and who is serving under a SAICA training contract. Train...

Reviewer
The 'reviewer' must be directly involved with the trainee during performance of the tasks by the trainee. The goal of...

Assessor
The 'Assessor' must be a CA(SA) or AGA(SA) and registered SAICA assessor. The assessor's main role on the EAT is to...

Evaluator
Ideally the 'evaluator' must know and regularly work with (manage, supervise or delegate work to) the trainee. Where ...

Moderator

Please note that all guidance related to the selected role will be displayed below.

Training Officer

Follow

The 'Training officer' is an individual who is responsible for performing the functions and duties ascribed to a training officer in terms of the SAICA Training Regulations. The training officer will be solely responsible to discharge their trainees' training contracts. This responsibility cannot be delegated to another role. The training officer is responsible for all administration on the EAT. The training officer will be able to perform all of the administrative functions of the 'training office administrator' user role. The TO can delegate their administrative responsibilities to another user on the EAT. The training officer can assign any of the other assessment roles (reviewer, evaluator, assessor) to their profile, as required.

Training Office EAT Navigation

Creating & Importing Training Plan

On-boarding of trainees via TCMS

Activating inactive trainees

New user creation by Training Office Administrator

Help Center & Support Request