



Guide to Online Training Records System

Introduction

The CPA Ireland online Records System will be used to input:

- Training Records
- Competency Records (part of application to membership only)
- Behavioural Attributes (part of application to membership only)

Information for Mentors

When a trainee has nominated you as a mentor (supervisor), you will receive an automatic email from the system requesting you to confirm that you are willing to act as a mentor. If you agree to this, some personal data will then be stored on our system (name, employer, email, professional qualification, address and phone number).

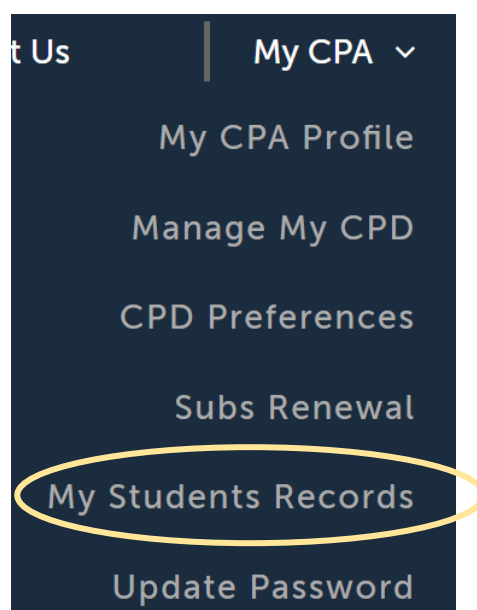
You will receive an email confirming approval by CPA along with information explaining how to access the system.

If you are a CPA member you will already have a [MyCPA](#) account and you will notice a new option on your drop-down menu – **My Student Records**.

If you are not a CPA member you will have a new [MyCPA](#) account set up and you will select the **My Student Records** option from the drop-down menu. You will receive an email confirming your login details.

We are asking trainees to log their training on a quarterly basis and for mentors to review and approve/reject training each quarter.

You will then see the screen below, click on **Training Records**:



| Student Records

<div style="background-color: #00a651; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Training Records</div> <p>Training records should be input each week and signed off by your supervisor on a quarterly basis.</p>	<div style="background-color: #00a651; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Competence Records</div> <p>These records are completed as part of your application to membership on completion of all examinations and training.</p>	<div style="background-color: #00a651; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Behavioural Attributes</div> <p>These records are completed as part of your application to membership on completion of all examinations and training.</p>
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If you have more than one student, click on the student whose records you wish to review and you will see the screen below:

Records Home

Training Records

Not Approved Approved CPA rejected Training Summary

Start Date: End Date:

Training Area	Year	Quarter	Level CCA	Level EvRR	Hours	Weeks (Equivalent)	Days (Equivalent)	Select
Financial Accounting			115	265	380	10	50	<input checked="" type="checkbox"/>
Taxation			0	66	66	1	8	<input checked="" type="checkbox"/>

When all training for a specific quarter has been reviewed and approved please click on Close Quarter. CPA will then be notified that all training for that Quarter has been approved. The student will not be able to log any further training for that quarter

Approving Records

Any records not yet approved by you will appear in the **Not Approved** tab seen above. You can then click into each Training Area (Financial Accounting, Taxation) to see the details of records submitted, such as the year, quarter, and the sub areas.

Below is an example of a student who has multiple entries for Taxation -> Income Tax -> Complete and submit Income Tax Returns. There are multiple entries shown as the student submitted these per day, but they all fall under Quarter 1, 2020. Some students may have only one entry for a certain area, but a higher number of hours logged to display hours worked over the whole quarter.

Training Area	Year	Quarter	Level CCA	Level EvRR	Hours	Weeks (Equivalent)	Days (Equivalent)	Select
Financial Accounting			115	265	380	10	50	<input checked="" type="checkbox"/>
Taxation			0	66	66	1	8	<input checked="" type="checkbox"/>
Income Tax			0	66	66	1	8	<input checked="" type="checkbox"/>
Complete and submit Income Tax Returns			0	66	66	1	8	<input checked="" type="checkbox"/>
	2020	1	0	8	8	0	1	<input checked="" type="checkbox"/>
	2020	1	0	7	7	0	0	<input checked="" type="checkbox"/>
	2020	1	0	7	7	0	0	<input checked="" type="checkbox"/>
	2020	1	0	7	7	0	0	<input checked="" type="checkbox"/>
	2020	1	0	8	8	0	1	<input checked="" type="checkbox"/>

Tick the **Select** box and then **Approve**. All records selected will be approved. Please note, if you approve records in error you can click on the **Approved** tab and select these records and click on **Unapprove**. Please note it is not possible to “unapprove” CPA Accepted records. You will be able to view these records on the Training Summary tab

When all training for a specific quarter has been reviewed and approved please click on Close Quarter. CPA will then be notified that all training for that Quarter has been approved. The student will not be able to log any further training for that quarter

Approve

Reject

Close Quarter

Once you have approved records, the mentor should click the **Close Quarter** button. Please only click this if you are certain the student has no further records to log for that quarter. Once this button is clicked, the student will be unable to input further records for that quarter, and CPA will be notified that we have records to review.

You can access this button on the *Not Approved* tab to press directly after approving records, otherwise you can access it on the *Approved* tab once they are approved, if you need to clarify which quarter(s) you approved, as sometimes students will need multiple quarters approved.

Rejecting Records

If you wish to **Reject** any records, select the appropriate record and click the reject button. You can enter a comment which will go back to the trainee. However, we advise mentors to discuss the training with their trainee before rejecting records, so the trainee has the opportunity to go back and edit the records, rather than having them rejected.

Training Requirements

Please note the following:

- Trainees must not log more than 1800 hours in one year (this is the equivalent to 48 weeks).
- Trainees are expected to achieve in-depth competence in at least 2 of the 6 training areas and to progress from the basic (CCA) to advanced (EvRR) level over the course of their training.

For further information on CPA Ireland’s training requirements, please refer to the CPA website (<https://www.cpaireland.ie/Current-Students/Training/Training-Requirements>).