CPA IRELAND

# 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)

Your mentor will also have access to the system so they can review the records you enter and approve/reject them.

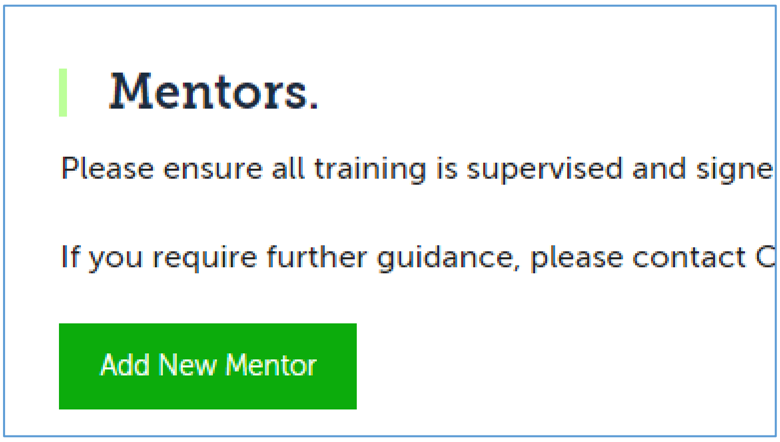
To access the system, log in to your MyCPA account, you will see the two options on the dropdown menu (**My Records** and **My Mentors**).


Before you enter any records, you must first nominate a mentor. You may nominate a different mentor for each of the three types of records. If you are not yet in your final year of training, you should initially only nominate a mentor for Training Records as the other two records are only used as part of an application to membership. Your nominated mentor will then be reviewed and approved or rejected by CPA. You will receive an email confirming this.

# Adding a Mentor (Training Record)

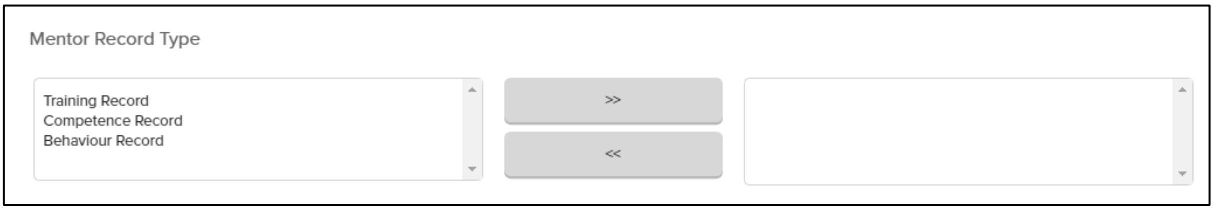
*Before you enter your mentor's details onto the system, please ask for their permission as you will be providing their personal information & contact details to us [GDPR].*

Click on **MY MENTORS** from the drop-down menu**.** You will see this screen.

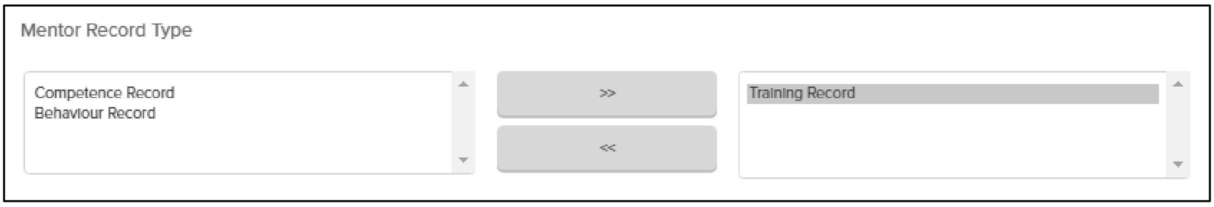



Click on **ADD NEW MENTOR**

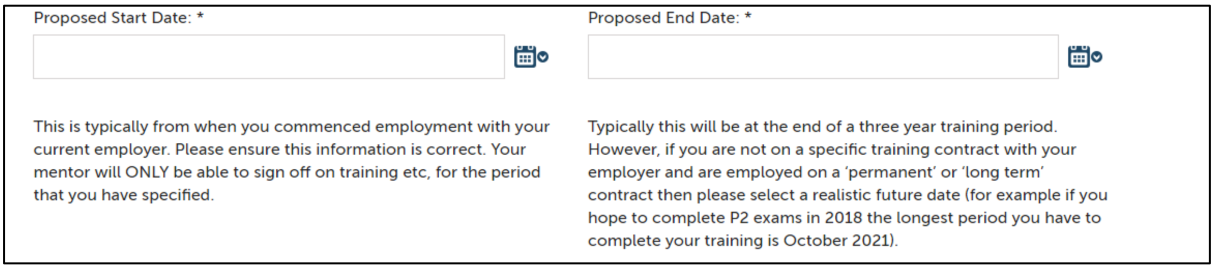
The **Mentor Details Screen** will then appear. This will enable you to enter details of your mentor for approval.




To select a mentor for **Training Records**, click on **Training Record** and then on **>>** [Repeat for Competence Record and Behaviour Record, as required]




You will then input the **Start** and **End** date:




**Start Date:**

This is typically from when you commenced employment with your current employer. Please ensure this information is correct. Your mentor will ONLY be able to sign off records for the period that you have specified.

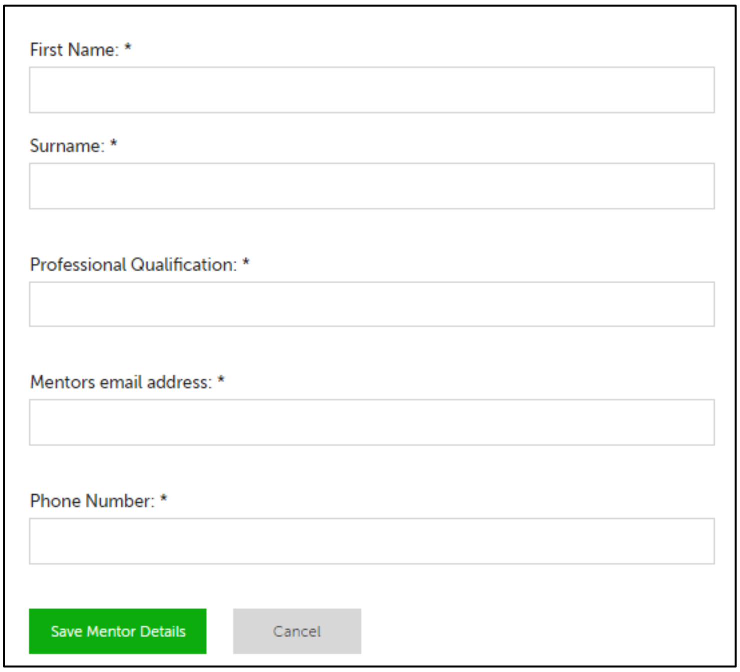
**End Date:**

Typically, this will be at the end of a three-year training period. However, if you are not on a specific training contract with your employer and are employed on a 'permanent' or 'long term' contract then please select a realistic future date. This end date can be changed if necessary. [Please note, if you change employment during your training you will need to create a new mentor with a new start date. When you add a new mentor with a new start date the end date of your previous mentor is automatically changed. See **Changing Mentor Details** section below]

You can then input contact details and professional qualification for your Mentor. Your training must be supervised and signed off by a mentor who is a fully qualified accountant and is a current member of a professional accountancy body which is a member of IFAC (International Federation of Accountants).

**[Please note you must enter at a minimum <u>Company Name</u>, <u>Country</u>, <u>County</u> and <u>Professional Body</u> for your Mentor.]**

Then add your Mentor's <u>Name</u>, <u>Professional Qualification</u>, <u>Email</u> and <u>Phone number</u>.



First Name: *

Surname: *

Professional Qualification: *

Mentors email address: *

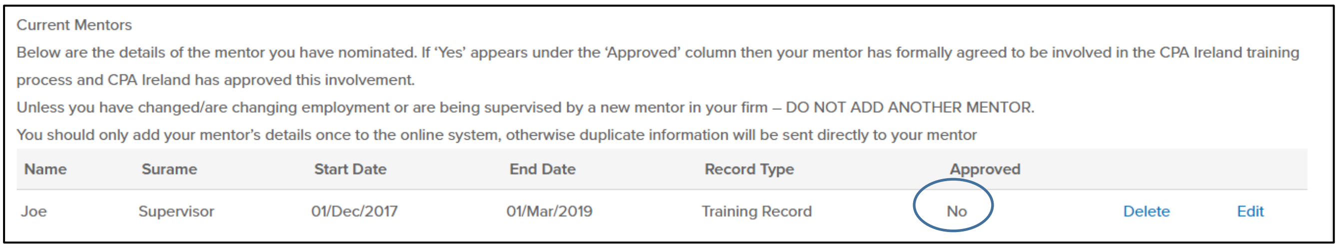
Phone Number: *

Save Mentor Details

Cancel

Please ensure all required fields (marked with *) are completed – you will not be able to save your mentor if this information is not completed.

Click on **SAVE MENTOR DETAILS,** you will now see the mentor you have added on your screen:



Current Mentors

Below are the details of the mentor you have nominated. If 'Yes' appears under the 'Approved' column then your mentor has formally agreed to be involved in the CPA Ireland training process and CPA Ireland has approved this involvement.

Unless you have changed/are changing employment or are being supervised by a new mentor in your firm – DO NOT ADD ANOTHER MENTOR.

You should only add your mentor's details once to the online system, otherwise duplicate information will be sent directly to your mentor

| Name | Surame | Start Date | End Date | Record Type | Approved | | |
|---|---|---|---|---|---|---|---|
| Joe | Supervisor | 01/Dec/2017 | 01/Mar/2019 | Training Record | No | Delete | Edit |

This has not yet been approved by CPA.

CPA will be automatically notified that you have requested to add a mentor. **Your mentor will also receive an email notifying them that you have added them as a mentor and they <u>must reply to that email to confirm that they are willing to act as your mentor,</u> otherwise they will remain unapproved on the system.** The qualification of the mentor will be confirmed by CPA and the mentor will be accepted if they are suitably qualified. You will receive an email to confirm this and you will also see this confirmed on your <u>MyCPA</u> (Mentor Approved will change to **Yes**).

If your mentor is CPA Ireland member, they will already have a MyCPA login. If they are not a CPA Ireland member, they will receive an email confirming their new MyCPA login and password.

## Changing Mentor Details

When you are leaving an employer or changing mentors within the same organisation you will need to update the online system. You will need to add a new mentor and specify the date from which this mentor relationship is valid.

For example, John has nominated Joe as his mentor from 1 January 2020 to 31 December 2021. John then decides to leave this employment and starts his new job with Mary as his mentor on 1 July 2021.

Simply add Mary (as above, with the start date of 1 July 2021). When Mary is approved as a mentor, Joe's end date will be automatically changed to 30 June 2021. Joe will still be able to sign off on records dated up to and including 30 June 2019, and Mary will now be able to sign records dated from 1 July 2019.

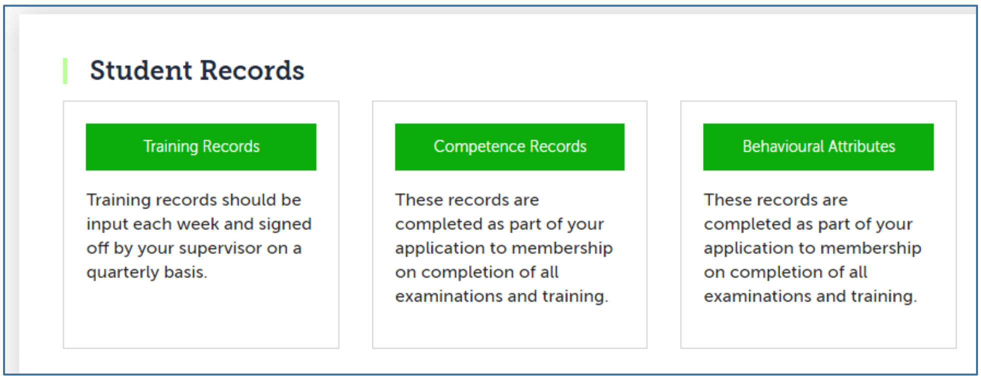
Do not delete your mentor at any stage. Please contact the Institute if you wish to remove a mentor.

## Adding Training Records

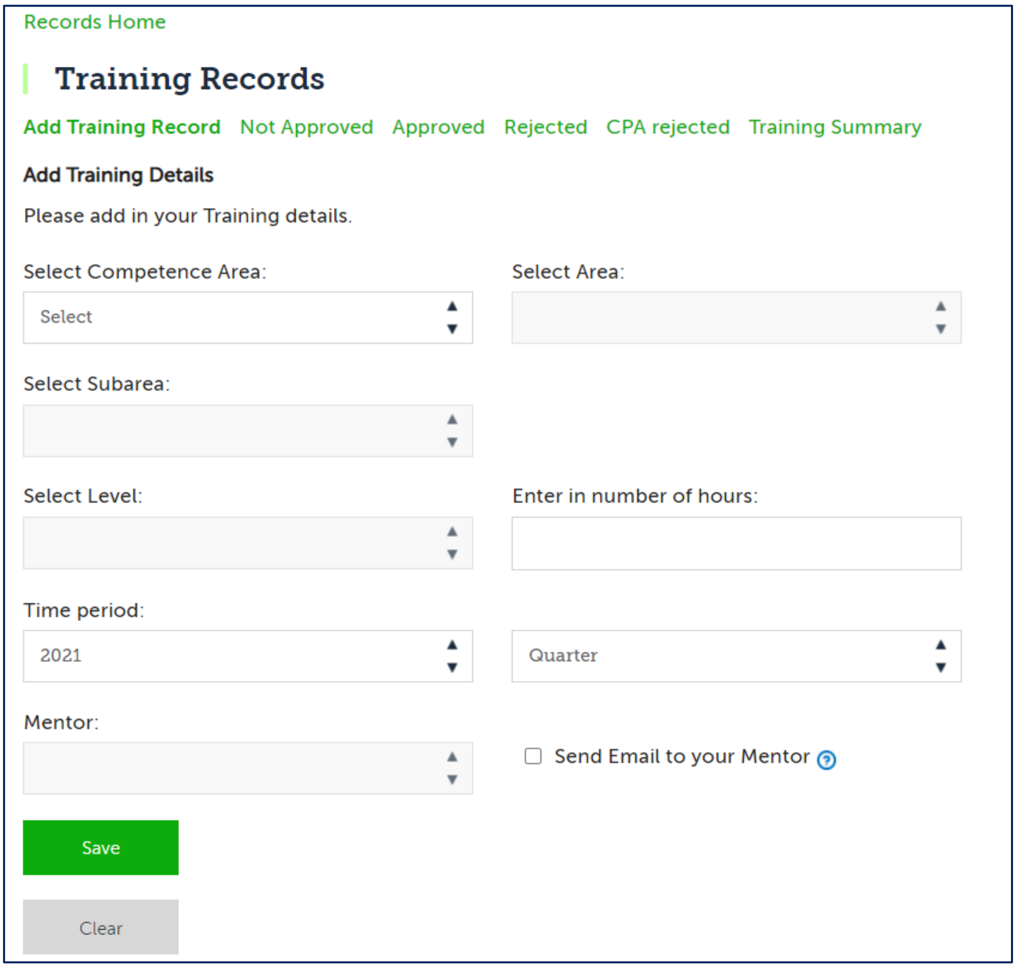
To add training records, return to the drop-down menu and select **MY RECORDS**:

You will see the screen below, and from here you can log Training Records, Competence Records or Behavioural Attributes. Please note, Competence Records and Behavioural Attributes should only be complete as part of your application to membership on completion of examinations and training.

Click on **Training Records**



This will bring you to the Add Training Record page

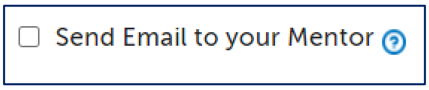



Enter your hours of training for the relevant quarter and year by selecting the appropriate Competence Area, Area, Subarea, Level, Hours and Date.

Please note, it is not possible to log more than the equivalent of **48 training weeks (1,800 hours) in any one year**.

Once students have **all** training input for a specific quarter(s), it should then be reviewed by your mentor.

The below tick box will send an automatic email to your mentor, once you click save. This will notify your mentor that all training for a specific quarter is logged, and ready for review. Please tick it after each quarter is logged in full.




This tick box is optional, and students are permitted to inform their mentor of records being ready for review by contacting them directly.

Once your mentor approves and closes the quarter, you will not be able to add any further records for that quarter. This process is explained in slightly more detail for mentors on pg. 16.

**Training Levels**

Trainees may record training at two different levels Collect, Categorise and Analyse (CCA) and Evaluate, Report and Recommend (EvRR). This is to record the expected escalation in complexity and responsibility as the training progresses.

**CCA** is more common at the earlier stages of a trainee's structured training programme, where there is less scope for working independently and the work is less complex or technical than when nearing qualification. This is appropriate where a trainee is involved in collecting and organising basic business facts into meaningful data in an environment in which the standards have been previously determined and there are established reporting structures. The trainee may be involved in the preparation, verification and analysis and extrapolation of information while under the close supervision of senior staff.

**EvRR** – is a progression from the training classified as CCA. The trainee will have a greater degree of autonomy and a more in depth understanding of relevant principles and procedures. The trainee will: be capable of exercising autonomy and judgement in applying knowledge and skills in the context of the Professional Standards and Ethics that apply to professional practice; manage and transform work contexts that are complex, unpredictable and require new strategic approaches; and, take responsibility for decisions and recommendations.

Students are required to have **at least** 26 weeks (975 hours) of EvRR level training recorded to qualify. This must be represented in two training areas, with at least 488 hours in each area. This EvRR training must be completed in conjunction with the final Strategic Level studies.

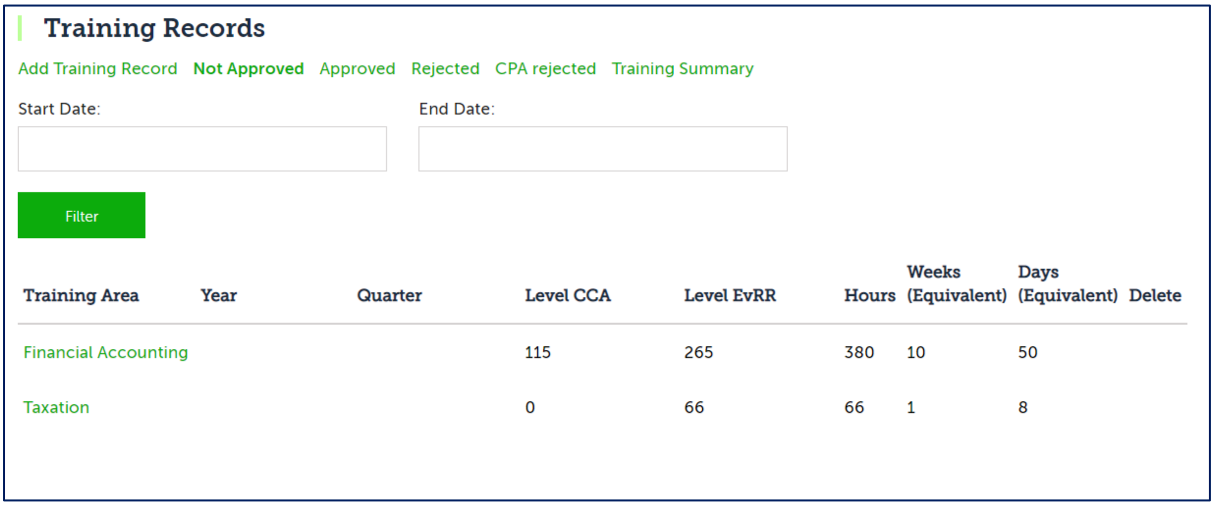
## Managing Training Records

To manage your training records simply click through the tabs on the **TRAINING RECORD** screen:

- **Add Training Record:** All training is logged on this page. Once saved it will be stored in the *Not Approved* tab
- **Not Approved:** Records awaiting approval from your mentor.
- **Approved:** Records approved by your mentor, but not yet by CPA.
- **Rejected:** Records rejected by your mentor.
- **CPA Rejected**: Records approved by your mentor, but subsequently rejected by CPA. (reason will be provided via email to mentor and trainee)
- **Training Summary:** This is the **only** tab on which records approved by CPA will appear, these records will be broken down by CCA and EvRR level. In this tab you will also see a summary of records approved by your mentor, not approved records and CPA rejected records.

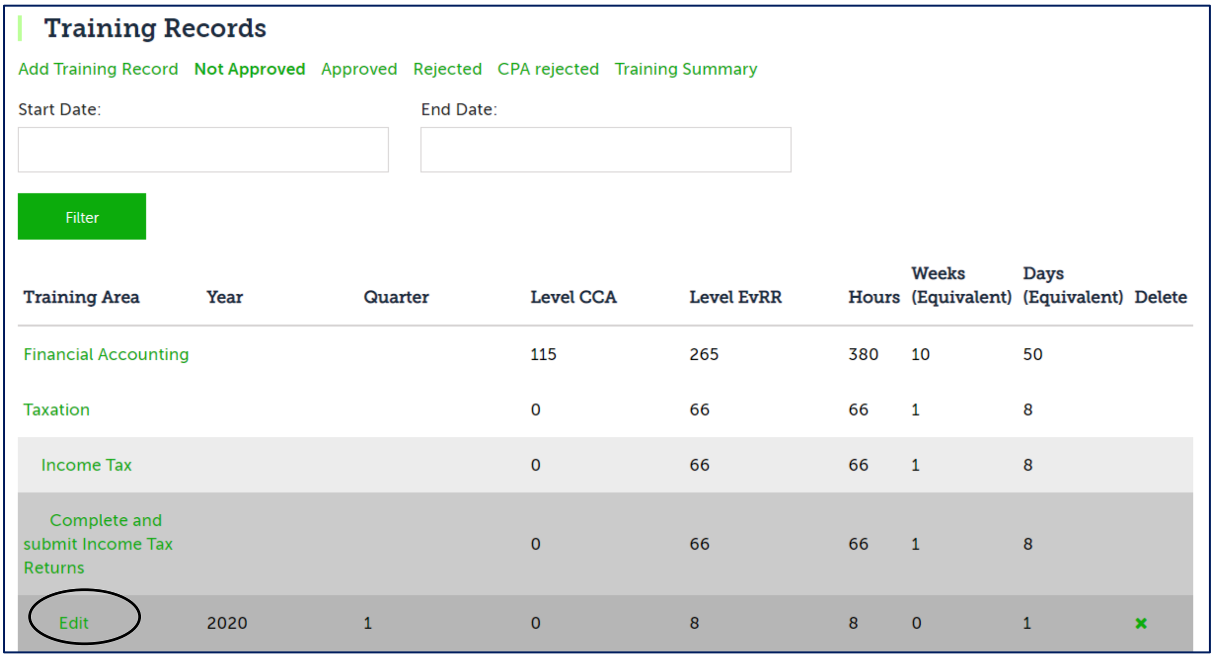
# Viewing and Amending Training Records

To view the training you have logged, click on the **Not Approved** tab. This screen will show all training logged which has not yet been approved by your mentor.




| Training Area | Year | Quarter | Level CCA | Level EvRR | Hours | Weeks (Equivalent) | Days (Equivalent) | Delete |
|---|---|---|---|---|---|---|---|---|
| Financial Accounting | | | 115 | 265 | 380 | 10 | 50 | |
| Taxation | | | 0 | 66 | 66 | 1 | 8 | |

If required, you can amend or delete the record before your mentor approves it. To do this click into the "Not Approved Tab" and then on to the Competence area, and then into the Area and then the final Subarea.




| Training Area | Year | Quarter | Level CCA | Level EvRR | Hours | Weeks (Equivalent) | Days (Equivalent) | Delete |
|---|---|---|---|---|---|---|---|---|
| Financial Accounting | | | 115 | 265 | 380 | 10 | 50 | |
| Taxation | | | 0 | 66 | 66 | 1 | 8 | |
| Income Tax | | | 0 | 66 | 66 | 1 | 8 | |
| Complete and submit Income Tax Returns | | | 0 | 66 | 66 | 1 | 8 | |
| Edit | 2020 | 1 | 0 | 8 | 8 | 0 | 1 | × |

You will then see the option to Edit or Delete the record on screen:

*Please ensure you change all required fields (Competence Area, Area, Subarea, Level, Hours and Date) or the original record will remain on the system.*

Please note, after your mentor has approved the records **no further amendments** will be possible.

When your mentor has approved the records, they will be automatically routed to CPA for approval. You will receive an email confirmation when your record has been approved/rejected by CPA.

If the training record is rejected for any reason this will be explained in the email. You will then be able to submit another record for that date.

If you record is rejected **by your mentor** you will be notified by email also. Rejected records will appear in the “Rejected tab”. Here you can view your mentor’s rejection comment also.

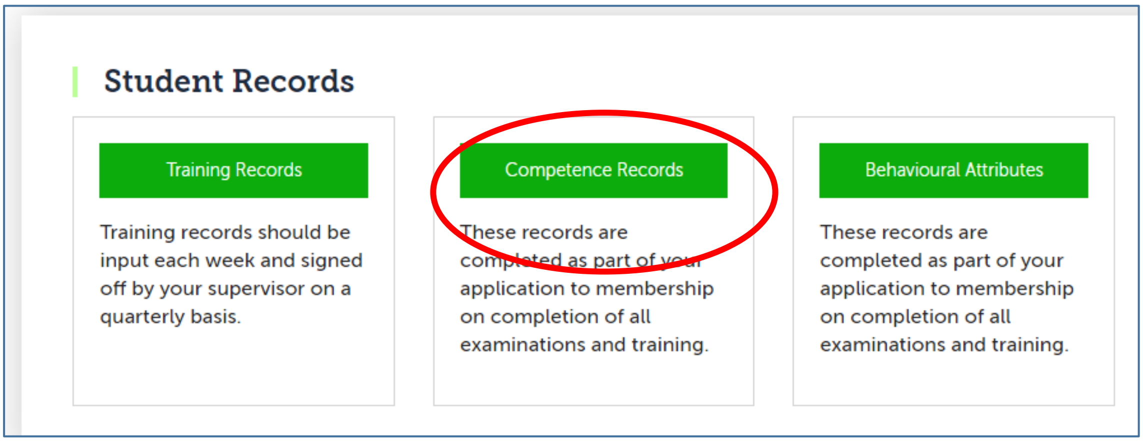
# Competence and Behavioural Records

Before entering your Competence Record and Behavioural Record you must ensure you have a mentor nominated to approve those records. You can check this under the **Mentors** option. Your nominated mentor will then be reviewed and approved or rejected by CPA. You will receive an email confirming this. Once your mentor is approved, they will be able to see your Competence and Behavioural Record

**Please note: You cannot enter a Competence Record in an area you do not have sufficient training in. When you have all three years training complete and submitted to CPA, you will receive a confirmation email upon review which will advise you of your two competence areas.**

# Adding Competence Records

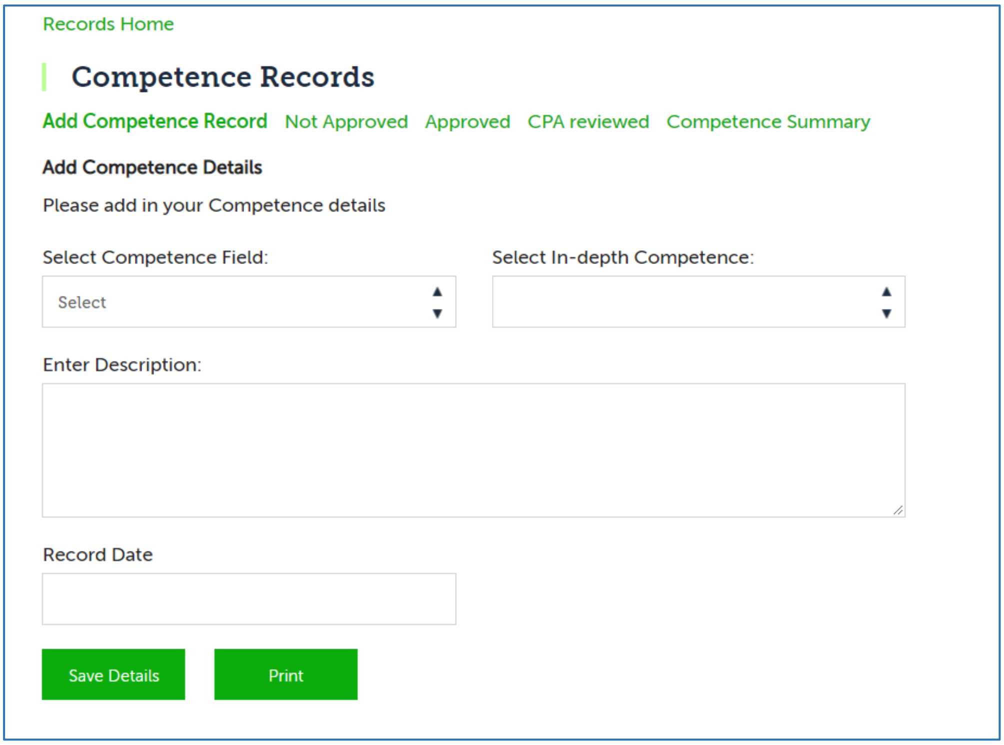
To add a Competence Record, access the below screen under **My Records** on the dropdown menu.




Enter your Competence Record selecting the appropriate Competence Field, and In-depth Competence Area. **We strongly advise you to type out your record in a separate Word Document and copy and paste it into the Enter Description box once you have the final version ready.**

You are required to submit 4 Competence Records – 2 for each area of in-depth competence.

Please note: Each Competency Record must contain at least 500 words – you will not be able to save the record if it does not reach this limit. Please provide as much **detail** as possible to demonstrate your in-depth competence.



Records Home

Competence Records

Add Competence Record   Not Approved   Approved   CPA reviewed   Competence Summary

**Add Competence Details**

Please add in your Competence details

Select Competence Field:

Select

Select In-depth Competence:

Enter Description:

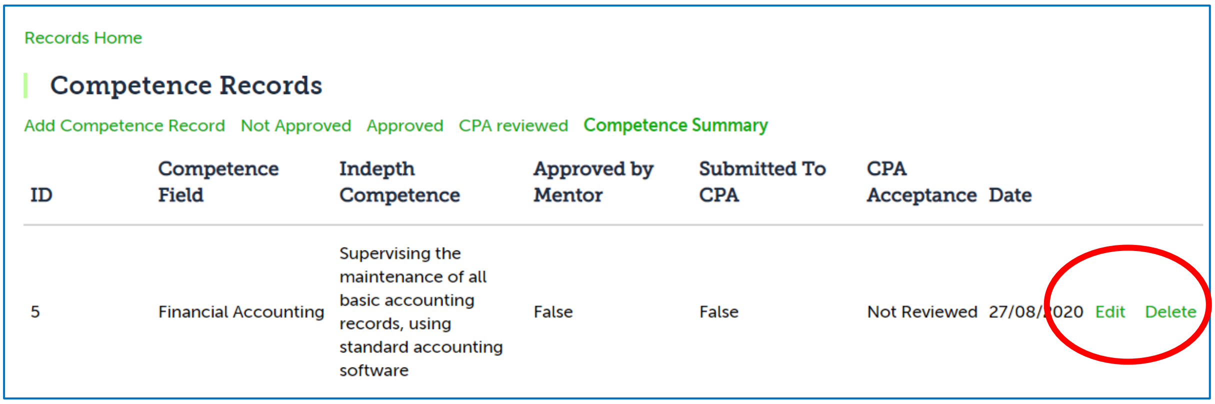
Record Date

Save Details   Print

Each tab will allow you to see your records at different stages. “**Not Approved**” are records not yet approved by your mentor, or CPA. “**Approved**” are records approved by your mentor. “**CPA reviewed**” are records accepted or rejected by CPA. “**Competence Summary**” allows you to see the status of all your records on one page.

## Viewing and Amending Competence Records

If required, you can amend or delete any record before your mentor approves it. To do this click into the “**Not Approved Tab**”. Please note, after your mentor has approved the records no further amendments will be possible.



Records Home

Competence Records

Add Competence Record   Not Approved   Approved   CPA reviewed   Competence Summary

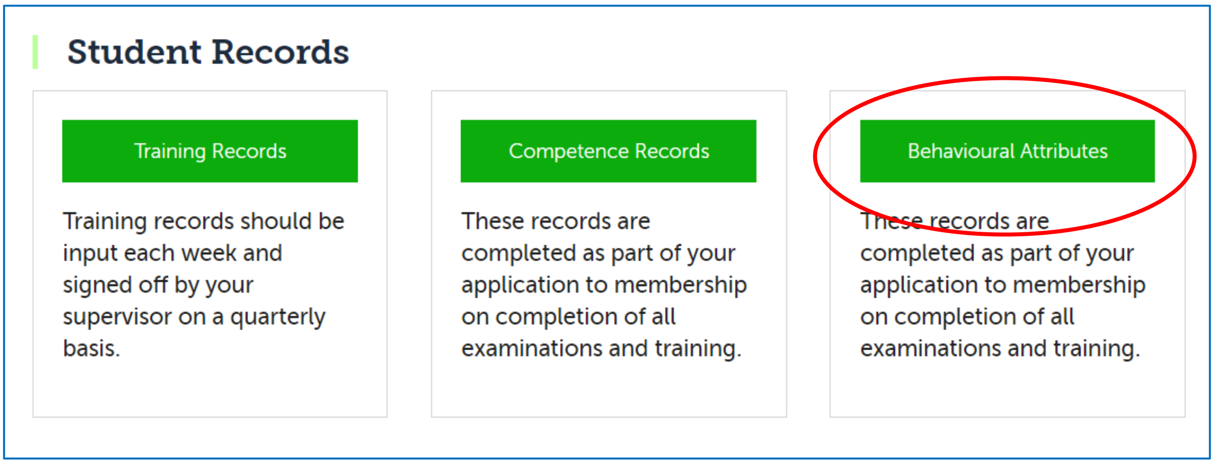
| ID | Competence Field | Indepth Competence | Approved by Mentor | Submitted To CPA | CPA Acceptance | Date | | |
|---|---|---|---|---|---|---|---|---|
| 5 | Financial Accounting | Supervising the maintenance of all basic accounting records, using standard accounting software | False | False | Not Reviewed | 27/08/2020 | Edit | Delete |

<u>Once you edit</u> a record, and then wish to input a new record, you must click on **Records Home** on the top left-hand corner of the above screenshot. From here, you can click back into the **Competence Record** section to refresh the section to allow you an input a new record and take you out of the edit mode. If this is not done, the system will keep you in edit mode and only allow you to further edit the record you previously amended.

- For details of the Competence Fields and In-Depth Competence Areas please refer to the [Guide to In-Depth Competence Fields]

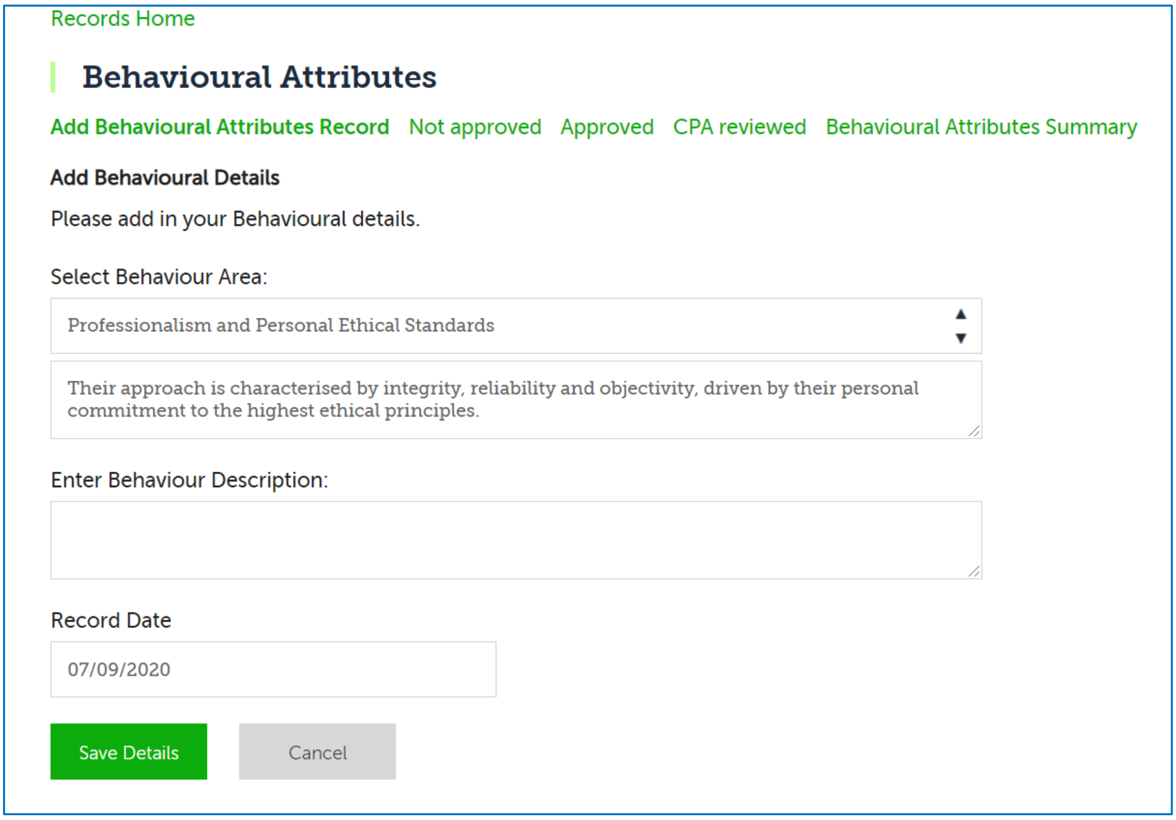
# <u>Adding Behavioural Attributes</u>

To access your Behavioural Attributes, you will need to go back to the **Records** page. This section works the same as the above explained Competence Records section.




Within this section, you will see the three main areas in a drop-down menu which we require applicants to demonstrate how, and where, you have displayed these attributes. When a Behaviour Area is selected, the box below will fill in with an example of what we expect to see in that area. Further explanation of each area can be found in this document.

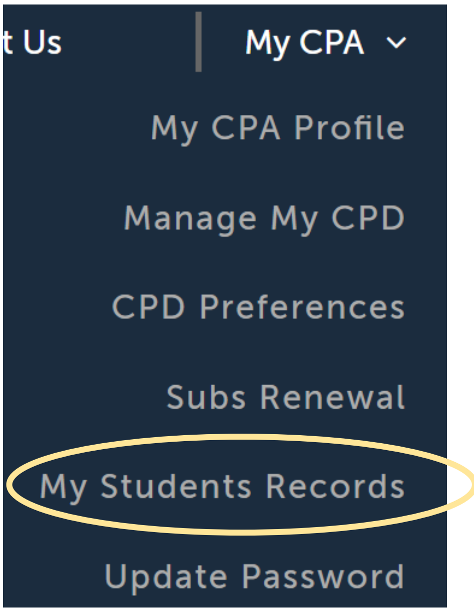
Please note: Each Behavioural Attribute Record must contain at least 200 words – you will not be able to save the record if it is less than 200 words. Please provide as much **<u>detail</u>** as possible to when describing your behavioural attributes.




Similarly to the Competence Record, we advise applicants to type out the Behavioural Attribute Record in a word document, and copy and paste the final draft into your MyCPA profile.

## 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).



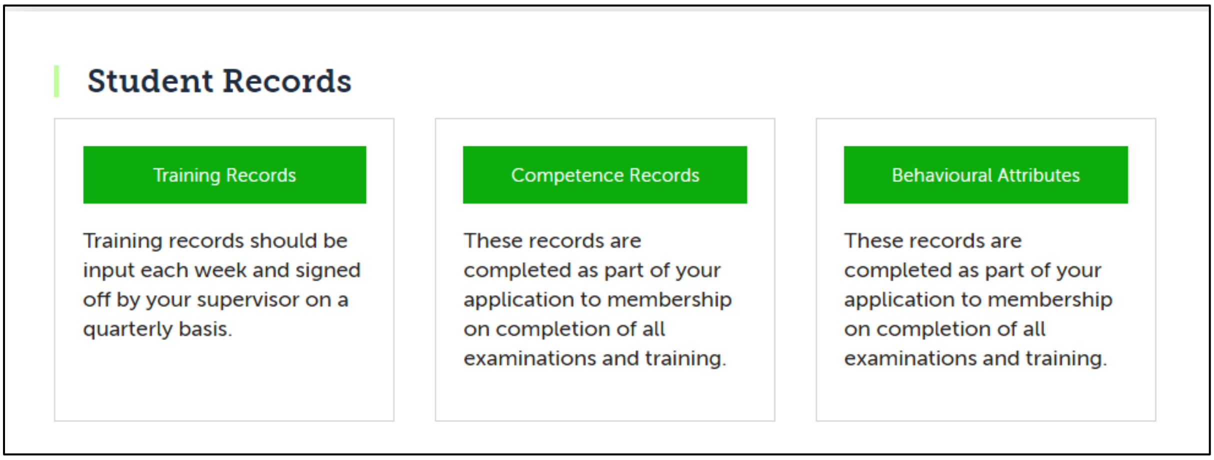

You will receive an email confirming approval by CPA along with information explaining how to access the system.

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**.

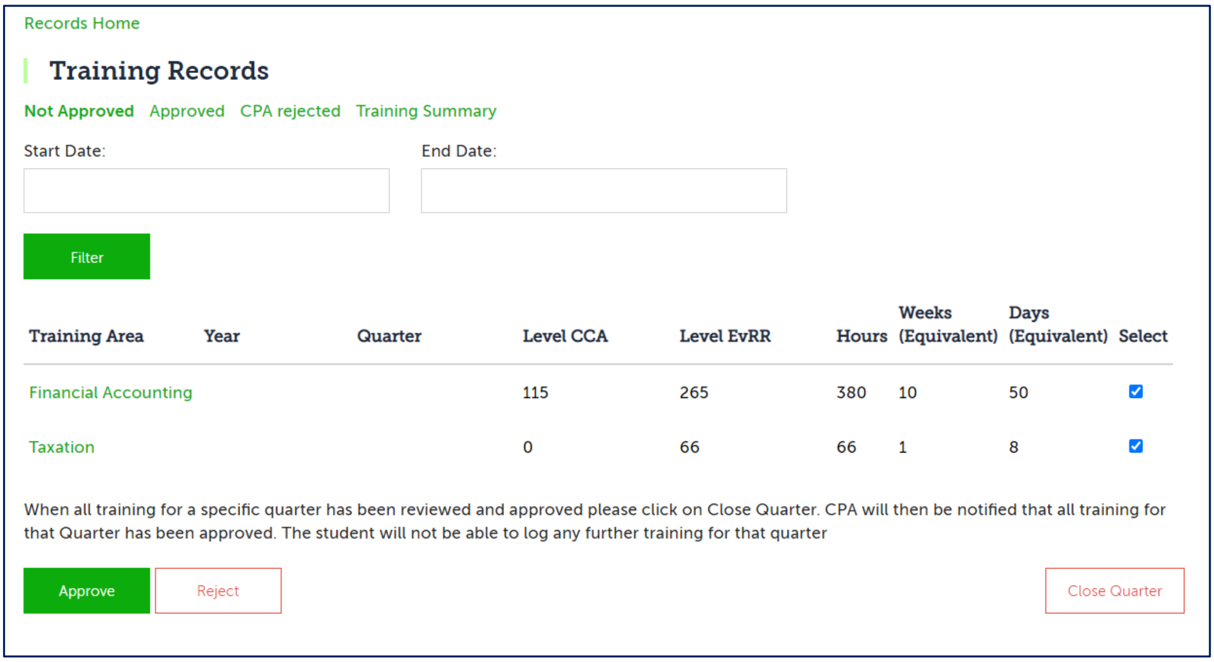
If you are not a CPA member you will have a new MyCPA account set up and you will select the **My Student Records** option from the drop-down menu. You will receive an email confirming your login details.

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**:



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:

Filter

| Training Area | Year | Quarter | Level CCA | Level EvRR | Hours | Weeks (Equivalent) | Days (Equivalent) | Select |
|---|---|---|---|---|---|---|---|---|
| Financial Accounting | | | 115 | 265 | 380 | 10 | 50 | ☑ |
| Taxation | | | 0 | 66 | 66 | 1 | 8 | ☑ |

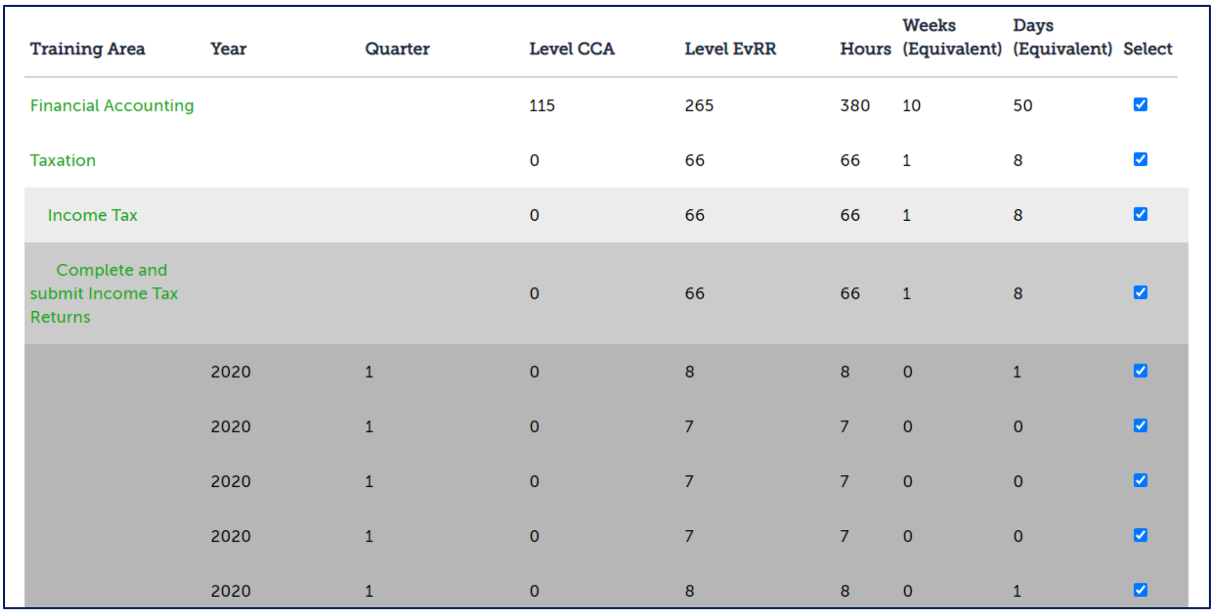
When all training for a specific quarter has been reviewed and approved please click on Close Quarter. CPA will then be notified that all training for that Quarter has been approved. The student will not be able to log any further training for that quarter

Approve Reject Close Quarter

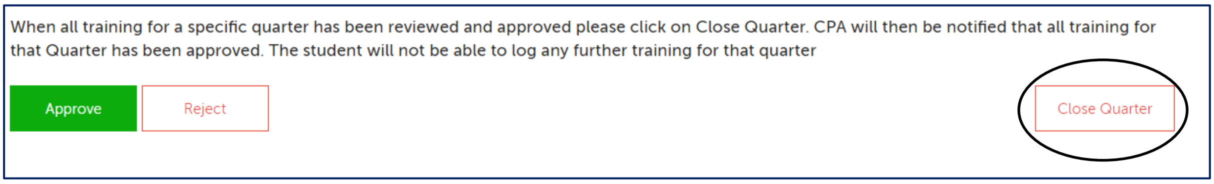
## Approving Records

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 | ☑ |
| Taxation | | | 0 | 66 | 66 | 1 | 8 | ☑ |
| Income Tax | | | 0 | 66 | 66 | 1 | 8 | ☑ |
| Complete and submit Income Tax Returns | | | 0 | 66 | 66 | 1 | 8 | ☑ |
| | 2020 | 1 | 0 | 8 | 8 | 0 | 1 | ☑ |
| | 2020 | 1 | 0 | 7 | 7 | 0 | 0 | ☑ |
| | 2020 | 1 | 0 | 7 | 7 | 0 | 0 | ☑ |
| | 2020 | 1 | 0 | 7 | 7 | 0 | 0 | ☑ |
| | 2020 | 1 | 0 | 8 | 8 | 0 | 1 | ☑ |

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




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).