# Guide to Online Training Records System

Introduction

The new 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 new options on the dropdown menu (**My Records** and **My Mentors**).
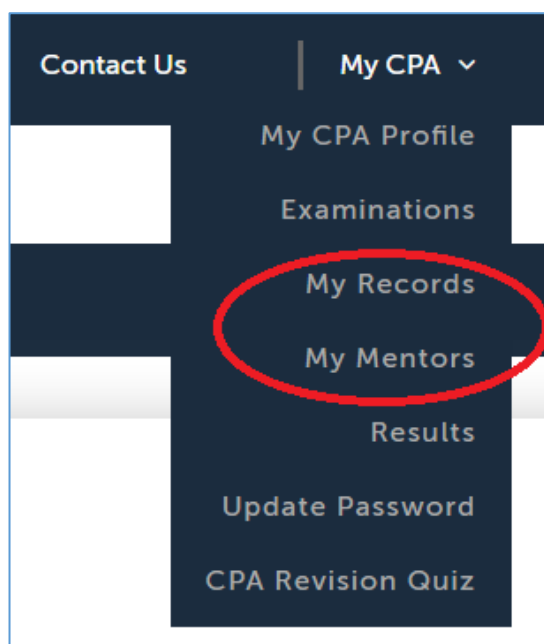

Before you enter any records you must first nominate a mentor. You may nominate a different mentor for each of the three types of records. If you are not yet in your final year of training, you should initially only nominate a mentor for Training Records as the other two records are only used as part 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 contact details to us.

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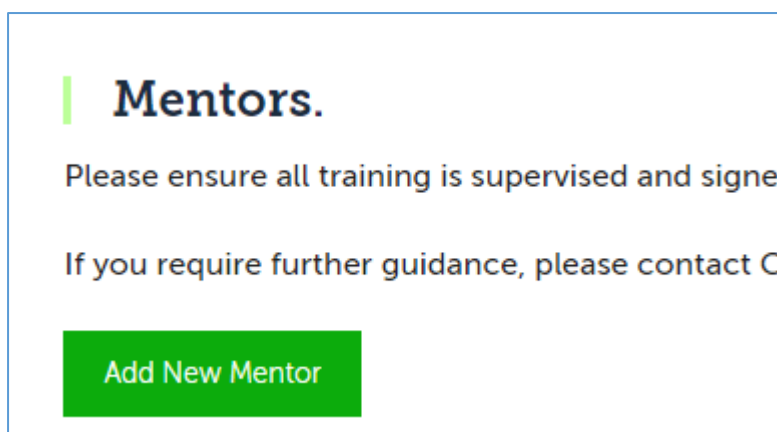
Click on **ADD NEW MENTOR**

The **Mentor Details Screen** will then appear. This will eable 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 (for example if you hope to complete P2 exams in 2020 the longest period you have to complete your training is October 2023). [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.]

Company: *

Company Address 1:

Company Address 2:

Company Address 3:

Company Post code:

Company City:

Company Address Country: *

Ireland

Company Address County: *

--Select--

Which professional accountancy body is your mentor a member of? *

CPA Ireland

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 must reply to that email to confirm that they are willing to act as your mento**r. 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 MyCPA (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 MyCPA login and password.

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**

Click on **Add Training Records,** enter your training record for each day by selecting the appropriate Competence Area, Area, Subarea, Level (see note below re **Training Levels**), Hours and Date. You can save this record and add further records, by following the prompts on the bottom of the screen.

Please note, it is not possible to log more than **12 hours of training in any one day** and it is not possible to log more than the equivalent of **48 training weeks in any one yea**r.

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.

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.

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 <u>Competence area</u> (e.g. Financial Accounting), and then into the <u>Area</u> and <u>Subarea</u>.

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

**Please ensure to 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 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.

Managing Training Records

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

Add Training Record – enables you to add training records for each day.

Not Approved – view records submitted by trainees not yet approved by mentor

Approved Tab – view records approved by the mentor, not yet approved by CPA

CPA Rejected – records rejected by CPA (reason will be provided via email to mentor and trainee)

Training Summary – summary of all training submitted

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 2018 to 31 December 2020. John then decides to leave this employment and starts his new job with Mary as his mentor on 1 July 2019.

Simply add Mary (as above, with the start date of 1 July 2019). When Mary is approved as a mentor, Joe's end date will be automatically changed to 30 June 2019. 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.

Information for Mentors

When a trainee has nominated you as a mentor, 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 chose 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 daily/weekly basis and for mentors to review and approve/reject training each quarter.

You will then see the screen below, click on **Training Records**:
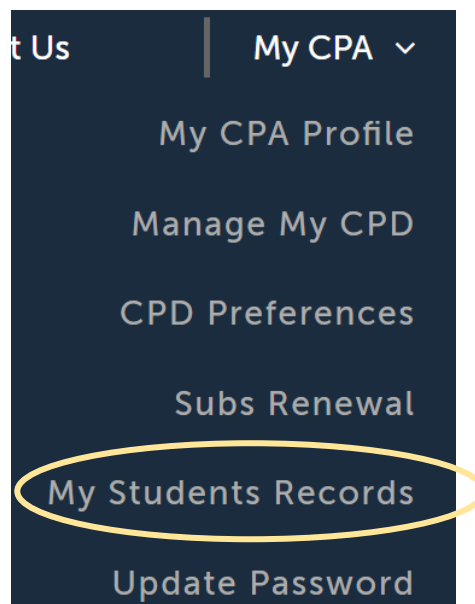
If you have more than one student, click on the student whose records you wish to review and you will see the screen below:

Any records not approved will appear in the **Not Approved** tab. You can then click into each area to see the details of records submitted. 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 unapproved records already approved by CPA.

Please note the following:

- Trainees must not log more than 12 hours each day.
- The maximum number of training weeks accepted each year is 48
- 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).