



Practical
Experience
Requirements

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Introduction

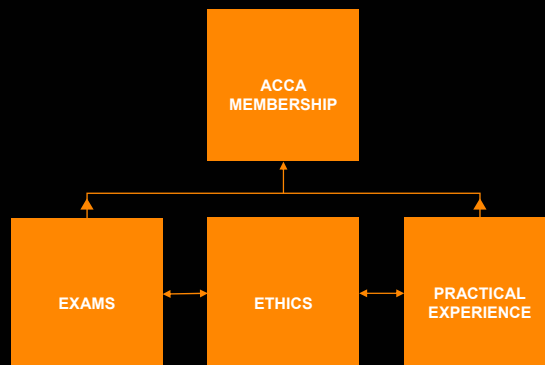
Performance Objectives

Transition process

Trainee's responsibilities

Recording achievement

ACCA membership



Nine Areas



Display performance objectives

TRANSITION

YOUR

your performance objectives

Print CV

YOUR WORKPLACE

YOUR ANNUAL RETURN

GUIDANCE

DISPLAY PERFORMANCE OBJECTIVES

This is your current status. You can filter your view using the drop-down menu.

Filter by status: All Filter

Click on the performance objective you want to view or update.

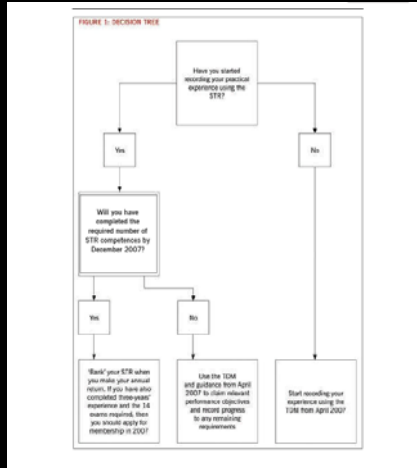
Essentials - you must achieve all nine

PERFORMANCE OBJECTIVE	STATUS	COMPLETED
1. Demonstrate the application of professional ethics, value and judgement	To achieve	
2. Contribute to the effective governance of an organisation	To achieve	
3. Raise awareness of non-financial risk	To achieve	
4. Manage self	To achieve	
5. Communicate effectively	To achieve	
6. Use information and communication technology	To achieve	
7. Manage on-going activities in your area of responsibility	To achieve	
8. Improve departmental performance	To achieve	
9. Manage an assignment	To achieve	

Options - you must achieve at least four

PERFORMANCE OBJECTIVE	STATUS	COMPLETED
10. Prepare financial statement for external purposes	To achieve	
11. Interpret financial transactions and financial statements	To achieve	
12. Prepare financial information for management	To achieve	
13. Contribute to budget planning and production	To achieve	
14. Monitor and control budgets	To achieve	
15. Evaluate potential business/investment opportunities and the required finance options	To achieve	
16. Manage cash using active cash management and treasury systems	To achieve	
17. Prepare for and collect evidence for audit	To achieve	
18. Evaluate and report on audit	To achieve	
19. Evaluate and compute taxes payable	To achieve	
20. Assist with tax planning	To achieve	

Transition from STR to PER



Trainee responsibilities



Workplace mentor's role

Setting targets and supporting trainee's development

Reviewing trainee's progress and achievement

Evaluating whether trainee has achieved performance objectives

Signing off performance objectives

Workplace mentor – who?

Must have knowledge of the trainee's work
eg line manager

Qualified ACCA/FCCA

Member of accountancy/audit body
recognised in that country

View performance objectives detail – related exams



View performance objectives detail – activities



View performance objectives detail – performance indicator

ACCA

TRANSITION
ITEM
YOUR WORKPLACE
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VIEW PERFORMANCE OBJECTIVE DETAILS

Performance Objective 1 Demonstrate the application of professional ethics, values and judgement

You must be fully aware of the ethics, values and standards that apply to you as a professional and make their application a consistent feature in all aspect of your work. This will include taking personal responsibility for your actions and regularly reflecting on your experiences to inform future actions and decision making. You

Status: To achieve Submission date: Sign-off date: [Development plan](#) [Challenge exercise](#)

Target to achieve Estimated date of achievement:

ACTIVITIES **PERFORMANCE INDICATOR** **KNOWLEDGE** **RELATED EXAMPLES**

TO PERFORM EFFECTIVELY YOU NEED TO:

- Uphold (and to be seen to uphold) professional ethics, values and standards
- Behave with integrity and objectivity e.g. act independently and avoid any conflict of interest
- Maintain professional competence, confidentiality and due care

[Print](#) [Save](#) [Refresh](#)

View performance objectives detail – knowledge

ACCA

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VIEW PERFORMANCE OBJECTIVE DETAILS

Performance Objective 2 Demonstrate the application of professional ethics, values and judgement

You must be fully aware of the ethics, values and standards that apply to you as a professional and make their application a consistent feature in all aspect of your work. This will include taking personal responsibility for your actions and regularly reflecting on your experiences to inform future actions and decision making. You

Status: To achieve Submission date: Sign-off date: [Development plan](#) [Challenge exercise](#)

Target to achieve Estimated date of achievement:

ACTIVITIES **PERFORMANCE INDICATOR** **KNOWLEDGE** **RELATED EXAMPLES**

KNOWLEDGE AND UNDERSTANDING:

- Demonstrating the application of professional values and judgement through an ethical framework that is in the best interest of society and the profession, in accordance with relevant professional codes, law and regulations
- Understanding the fundamental principles contained within the ACCA's Code of Ethics and Conduct

[Print](#) [Save](#) [Refresh](#)

Development plan

YOUR DEVELOPMENT PLAN

Performance Objective 1-Demonstrate the application of professional ethics, value and judgement

Help plan your development by outlining how and when you will achieve this performance objective. [Click here](#) for further guidance and to view an example.

Target start:

Target end:

How will I obtain this experience?

What skills do I need to develop and how can I do that?

Who will help me achieve that?

Role profile

YOUR ROLE PROFILE

Employer: AICA

Enter or update your role profile(s) while working at this employer.

Start date:

End date:

Role title: What title best describes your role?

Purpose of the role: In one or two short sentences describe what is the key purpose of your role

Key relationships: list the internal and external stakeholders relevant to this role

Example role profiles

The screenshot shows a web browser window titled "Example Role Profiles - Microsoft Internet Explorer provided by ACCA". The page content includes a search bar with "Sector" set to "All" and "Size" set to "All". Below the search bar is a table of role profiles with columns for "SELECT", "JOB", "SECTOR", and "TITLE".

SELECT	JOB	SECTOR	TITLE
<input checked="" type="radio"/>	Non practice 2000+ employees	Public Sector	Internal Auditor
<input type="radio"/>	7-6 directors or partners	Public Practice	Senior Auditor and Accountant
<input type="radio"/>	Non practice 2000+ employees	Public Sector	Chem
<input type="radio"/>	100+ directors or partners	Public Practice	Principal Auditor

Below the table, there is a "Purpose" section: "Reviewing systems and processes within the organisation, provide reports, training, assessing and dealing with audit queries". A "Key Relationships" section: "Higher education funding council for England, Management both in schools and finance, audit committees". A "Key Activities" section: "undertake audits, draft reports, undertake training, guidance on control and procedures". A "Work Setting" section: "It is a stable organisation, subject to government legislation or changes (budgeting especially)".

Challenge questions – submitted for review

The screenshot shows a web browser window titled "YOUR CHALLENGE QUESTIONS". The page includes a navigation menu on the left with options: "PERFORMANCE OBJECTIVE", "YOUR WORKPLACE", "YOUR ANSWER", "RETURN", and "GUIDANCE". The main content area is titled "YOUR CHALLENGE QUESTIONS" and contains the following text: "Respond to each of your challenge questions in no more than 100 words. [Click here for further assistance.](#)"

Below this text is a table for "Performance Objective 1: Demonstrate the application of professional ethics, value and judgement". The table has columns for "QUESTION" and "YOUR ANSWER".

QUESTION	YOUR ANSWER
1. Describe an occasion on which you had to demonstrate ethical behaviour.	
2. What did you learn from this experience and how will it influence your future behaviour in the workplace?	
3. What would have been the impact had you not behaved ethically in this situation?	

Below the table is a "Performance Objective Submissions" table with columns: "WORKPLACE NUMBER", "SUBMITTED", "STATUS", and "DATE".

WORKPLACE NUMBER	SUBMITTED	STATUS	DATE
A/N Other	28-Mar-2007	Awaiting response	Custom completion of paper seen off

Below the table is a "Notes" section: "You and your workplace mentor may add notes here". It includes a table with columns: "NOTES", "ENTERED BY", and "ENTERED DATE".

NOTES	ENTERED BY	ENTERED DATE

Workplace and Mentor Details

YOUR WORKPLACE DETAILS

Performance Objective 1 - Demonstrate The Application of Professional Ethics, Value and Judgment
Select the employer you were working for when you gained the experience to meet the performance objective or add new employer details.

EMPLOYER	START DATE	END DATE	USE AS PENDING APPROVAL
BCGA	28-Mar-2007	26-Oct-2012	<input type="checkbox"/>

Add Employer

Mentor **Edit Profile**

Select the workplace mentor who will review and sign off this performance objective by clicking the "link" against the mentor or enter new workplace mentor details.

MENTOR NAME	JOB TITLE	ACTIVE
A. N. Other	Finance Director	Active

Add Workplace Mentor

Annual Return Requirement

YOUR PER ANNUAL RETURN

Have you completed any relevant work experience?

Select Year: 2007

Yes

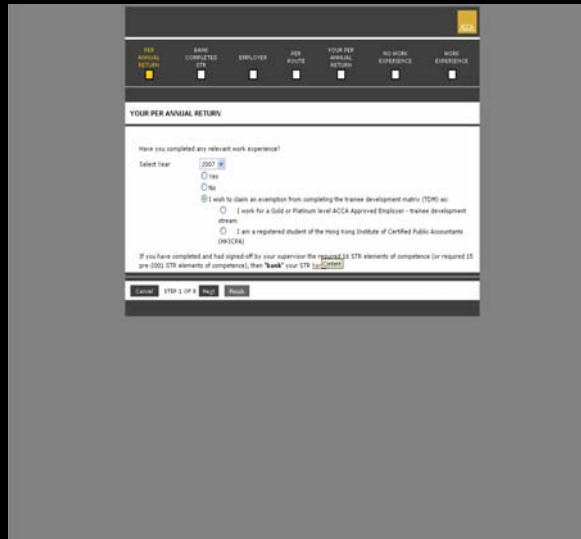
No

I wish to claim an exemption from completing the trainee development matrix (TDM) as:

If you have completed and had signed off by your supervisor the required 10 STR elements of competence (or required 13 pre-2012 STR elements of competence), then 'bank' your STR (12/12).

Next

TDM exemption



The screenshot shows a web form for the TDM exemption process. At the top, there is a progress bar with six steps: STEP 1: RETURN, STEP 2: COMPLETE, STEP 3: EMPLOYER, STEP 4: PER, STEP 5: YOUR PER, and STEP 6: NO WORK. STEP 2 is currently active. Below the progress bar, the section is titled 'YOUR PER ANNUAL RETURN'. The main question is 'Have you completed any relevant work experience?'. There is a dropdown menu for 'Select year' set to '2007'. Below this are three radio button options: 'Yes', 'No', and 'I wish to claim an exemption from completing the trainee development matrix (TDM) as:'. Under the 'I wish to claim...' option, there are two sub-options: 'I work for a Gold or Platinum level ACCA Approved Employer - trainee development matrix' and 'I am a registered student of the newly trialing Institute of Certified Public Accountants (INICCPA)'. At the bottom, there is a note: 'If you have completed and had signed-off by your supervisor the required 24 STR elements of competence (or required 25 or 2002 STR elements of competence), then "bank" your STR to (2007)'. Navigation buttons for 'Previous', 'Next', and 'Finish' are at the bottom.

Summary

Planning

Annual return

TDM online – the benefits



Thank you