

A Mentors Guide to the CA Diary of Professional Development

**THIS DOCUMENT SHOULD BE USED TO SUPPORT THE CA
PROFESSIONAL DEVELOPMENT EXPERIENCE:
*GUIDELINES FOR TRAINEES***



THE INSTITUTE OF
Chartered Accountants
IN IRELAND

Introduction

The CA Diary of Professional Development, which has been online since 2006, is the essential tool which records the of trainees' experience over the period of their training contract and forms part of their application for admission to ICAI membership.

Mentors are required to carry out bi-annual reviews of their trainees' record of experience.

All trainees are required to keep their CA Diary up-to-date throughout the training contract. A trainee must get a mentor to read, review and sign-off on the individual entries so that they can verify the achieved competencies. The review simply consists of locking the individual entries and submitting them online.

Mentors can log-on to the CA Diary of Professional Development at <http://cadiary.learnonline.ie/admin/index.php>

The Review

The basic steps for the mentor for the first and subsequent reviews are:

One- Read the guidelines that outline the areas of experience. Be familiar with the core competencies that all trainees have to attain:

- Financial reporting (FA1 – FA4)
- The business environment (CB1- CB6)
- Professional values / personal & interpersonal skills (PV1 – PV7)

In addition trainees must also demonstrate an in-depth level of experience in any one of the following areas

- Auditing
- Taxation
- Finance
- Organisational and Strategic Business Management
- Information Technology

The guidelines, a set of sample entries and a set of power points for mentors and trainees on how to use the system are also available on the webpage <http://www.icaei.ie/en/Students/Student-Services/CA-Diary-Information/>

Remember the review is a two task review- you have to lock the individual entries and submit a review for each trainee twice year.

Two- Read the trainees' entries (login to <http://cadiary.learnonline.ie/admin/index.php> or ask your trainee to print off their PDF Document).

As you read the entries you are examining them to determine whether;

- there is sufficient information and reflection by the trainee in the text for you to sign off on the competencies selected

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- the trainees has to explain what they did and more importantly what they learned in the time period covered in the entry. Mentors must also ensure that audit experience dates selected are accurate.
 - the trainees has given you sufficient information within the text that will allow you to sign-off on the competencies selected by the trainee.
 - the trainees has selected the correct competencies for the text, and that they have remembered the Business Environment and IT competencies where relevant as these are mandatory competencies for all trainees.
 - the dates they are selecting for audit experience are accurate.
 - the trainee has to respect client confidentiality at all times.

Three To carry out the review and lock the entries, login in to the CA Diary. When you have reviewed your trainees' entries and want to sign off on them just lock the entries.

Use the mentor review tab to document the review process. Any feedback you wish to give to the trainee can be documented in the text box. I would suggest that you only provide comments relating to the learning on the training contract here. This review is not the vehicle to discuss any other issues that would be covered under the firms HR policies.

The first item is on ethics. We expect all trainees to behave ethically –always.

When carrying out the review online a mentor must input their text and the trainees' text in one sitting using the review panel. It is not possible to create a draft review and revisit it. Mentors should also note that the review goes into the trainees PDF document and is not housed in your profile. For security reasons the page times out in one hour, so if possible have your discussions first and enter the comments and **press submit review**.

Lastly

The reason it is important to lock and review the trainees entries is that you as the mentor are the best judge of the accuracy of the content and the competencies attained.

Locking entries will prevent trainees going back over their entries and reediting them. You will be able to bench mark their improvement in the entries style and content over time. Once you have carried out one review the process will become faster for you and the trainee.

Trainees have the option of entering goals and achievements in their login. It is not a compulsory part of the system. It was included as an aid to the trainee.