



## CA Education & Training

# CA DIARY of Professional Development Elevation Programme

[www.charteredaccountants.ie](http://www.charteredaccountants.ie)

## Student's Presentation

EDUCATING  
SUPPORTING  
REPRESENTING

Caroline Bolster



Chartered  
Accountants  
Ireland

- 
- Setting the CA Diary in context
  - How to use the diary & record their experience.
  - Are you getting relevant work experience or focusing on their exams first.
  - Format of follow up support





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FAE Elective

FAE Core

FINAL ADMITTING EXAMINATION

CAP 1 & CAP 2

FINANCIAL REPORTING

Financial Reporting

Financial Accounting

MANAGEMENT ACCOUNTING & FINANCE

Strategic Finance & Management Accounting

Finance Management Accounting

ADVISORY SERVICES

Auditing & Assurance

Taxation II

Law for Accountants

Taxation I

WORK EXPERIENCE & IT SKILLS

ACE

Online CA Diary

Professional Education Programme

Training Experience



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# Why have a period of Professional Development ?

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Enable you to

**acquire professional values**

demonstrate ethical behaviour

Objectivity/independence

**develop personal/interpersonal skills**

self-management

communication

strategic attitude

**Become technically competent**



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# CA Diary of Professional Development

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## What is Competency?

- Being able to perform a work role to a defined standard (*IFAC*)
- Chartered Accountants Ireland has
  - identified competencies (*FA, CB, PV, AU, TX etc*)
  - identified mandatory competencies (*FA1-FA4, PV and CB*)
  - identified levels of competencies (*understand, apply & integrate*)
- All definitions are in the Guidelines
- Guidelines are on the webpage and stored in the CA Diary on the Control Panel
- As you create entries they are 'unlocked', as you work with your mentor the mentor 'locks' your entries as the sign off. Locked entries are what are counted towards Admission to Membership



# Breakdown of Levels

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## **Level 1: Understands**

- Trainee can grasp a clear understanding of the task assigned.
- Can carry out tasks that are established processes.
- Works under supervision.
- Collects, organises and analyses basic information using established criteria.
- Communicates verbally, and in writing to an in-house audience.

## **Level 2: Applies**

- Becomes pro-active in managing routine tasks.
- Carries out assignment with a lesser degree of supervision.
- Performs as part of a team in planning and executing assignments.
- Assumes appropriate additional responsibility.
- Communicates verbally in-house and prepares, for manager, written communication to clients.

## **Level 3: Integrates**

- Identifies problems and resolves them.
- Demonstrates an in-depth technical knowledge in defined areas.
- Demonstrates clear managerial/leadership skills.
- Demonstrates ability to manage an assignment/project to completion.
- Generates ideas and is proactive in implementing.
- Communicates concisely and effectively, verbally and in writing, both in-house and to clients.



# Recording Competencies

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## CA Diary of Professional Development

- electronic tool [www.icaireland.ie/cadiary](http://www.icaireland.ie/cadiary)
- chart the acquisition of your competencies
- monitored by your mentor through reviews
- forms part of your submission for Application for Admission to Membership



WHEN MAKING A DIARY ENTRY ALWAYS  
RESPECT CLIENT CONFIDENTIALITY



Name: EP Student  
Registration No: epstudent1

Firm: EP Group  
Mentor:



>>Home

Logout

CA Diary Home

Welcome to the CA Diary

**Guidelines**



**Create your entry**

**CA Professional Development**  
Read the guidelines first please (pdf)

**CA Diary Help**  
FAQ  
User Guide (pdf)

**Go To Diary**

**My Reports**  
My CA Diary of Professional Development

**Contact Us**

**Monitor your progress**



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Name: EP Student  
Registration No: epstudent1

Firm: EP Group  
Mentor:



[Home](#)->[My Diary](#)

[Logout](#)

## CA Diary

Your completed list of Diary entries to date

Days evidenced: 0 (0 days locked by mentor)  
Credit for prior experience: 0  
Total days evidenced: 0

- [Add New Diary Entry](#)
- [Goals and Achievements](#)
- [View my Diary](#)
- [Contact us](#)



Date Created	From Date	To Date	Days evidenced	Audit Days (Type)	Work Activity	Learning Level	Completed Competencies	Status
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Your Diary is currently Empty  
Click [Add new entry](#) to begin

## Notes


- Every entry will show you the number of days evidenced
- Entries list in the order that you create them –date created
- You cannot delete an entry- edit it
- Status will be unlocked until your mentor locks them
- Use the Learning Level heading to check your own progress



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# View of a blank template


Name: EP Student      Firm: EP Group  
Registration No: epstudent1      Mentor:



[Home](#) -> [My Diary](#) -> [New Entry](#) [Logout](#)

## Work Experience

Reflect on your experience, making reference to the levels of competence: Understands, Applies and Integrates


Date: 01-Oct-09      From: [ ]      To: [ ]      Work Activity: [ ]       Competencies: [ ]

[Add New Diary Entry](#)  
[Goals and Achievements](#)  
[View my Diary](#)  
[Contact us](#)


### Reflection on Work Activity

**B** *I* U | ☰

[ ]

Determine Your Level       Understand       Apply       Integrate

### Register your Competencies

Select Category	Select Competencies	Selected
Select Competencies 	[ ]	[ ]

# Start by populating your dates and your work activity

The screenshot shows a web application interface for diary entry. At the top, there are two calendar widgets for October 2009. Below them are input fields for 'Date' (01-Oct-09), 'From' (01-10-2009), and 'To' (30-10-2009). A 'Work Activity' field contains 'Place of Work' and has an information icon ('i'). To the right, there are links for 'Integrates', 'Competencies', 'Add New Diary Entry', 'Goals and Achievements', 'View my Diary', and 'Contact us'. A text area for 'Reflection on Work Activity' is below the date fields. A large text box in the center says 'Click on the 'i' buttons for further explanations'. Below this, there are radio buttons for 'Determine Your Level' (selected), 'Understand', and 'Apply'. A 'Register your Competencies' section has a 'Select Category' dropdown menu with 'Financial Reporting' selected, and a 'Select Competencies' list. A 'Selected' list is empty. A 'Save to Diary' button is at the bottom.

**Click on the 'i' buttons for further explanations**

**Work Activity**  
For the field Work Activity populate the name of your place of work that you gained this piece of experience. Work activity is a compulsory field for the Elevation programme.

**Select Category**  
Select Competencies  
Financial Reporting  
Auditing  
Business Environment  
Taxation  
Finance  
Professional Values  
Information Technology/ Systems

**Select Competencies**

**Selected**

**Save to Diary**



## Click on the 'i' buttons for further explanations

Name: EP Student Firm: EP Group  
Registration No: epstudent1 Mentor:

Home->[My Diary](#)->[New Entry](#) [Logou](#)

**Work Experience** *i* Reflect on your experience, making reference to the levels of competence: Understands, Applies and Integrates

Date From To Work Activity Competencies

01-Oct-09 01-10-2009 30-10-2009 Place of Work *i*

Reflection on Work Activity

**B I U** | ☰

Click on the drop down menu Select Category  
All the tasks will list in Select Competencies box  
Click on the Competencies and click the ARROW that points to the Right

[Add New Diary Entry](#)  
[Goals and Achievements](#)  
[View my Diary](#)  
[Contact us](#)

Determine Your Level *i* Understand  Apply  Integrate

Register your Competencies

Select Category	Select Competencies	Selected
Financial Reporting <i>i</i>	FA1 - Records	
Select Competencies	FA2 - Prepares	
Financial Reporting	FA3 - Analyses	
Auditing	FA4 - Regulation	
Business Environment	FA5 - Designs	

Name: EP Student  
Registration No: epstudent1

Firm: EP Group  
Mentor:



[Home](#)->[My Diary](#)->[New Entry](#)

[Logout](#)

## Work Experience ?

Reflect on your experience, making reference to the levels of competence: Understands, Applies and Integrates

Date: 01-Oct-09  
From: 01-10-2009  
To: 30-10-2009  
Work Activity: Place of Work

Competencies

- [Add New Diary Entry](#)
- [Goals and Achievements](#)
- [View my Diary](#)
- [Contact us](#)

### Reflection on Work Activity

**B** *I* U | ☰

When the Competencies are attached correctly they will populate in the Selected Box

If you want to remove it just click and select the arrow that points to the left

Determine Your Level ? Understand  Apply  Integrate

### Register your Competencies

Select Category	Select Competencies	Selected
Financial Reporting	FA1 - Records FA2 - Prepares FA3 - Analyses FA4 - Regulation FA5 - Designs	FA1 - Records



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## Work Experience i

levels of competence: Understands, Applies and Integrates

Date From To Work Activity Competencies  
01-Oct-09 01-10-2009 30-10-2009 Place of Work i

- [Add New Diary Entry](#)
- [Goals and Achievements](#)
- [View my Diary](#)
- [Contact us](#)

### Reflection on Work Activity

**B** *I* U | ☰

**ONLY** IF you are training in Practice some of your work experience maybe relevant to the Auditing Certificate  
You have the ability to evidence your auditing experience  
Check with your Mentor before you record Auditing experience

Determine Your Level i Understand  Apply  Integrate

### Register your Competencies

Select Category	Select Competencies	Selected
Auditing <span>i</span>	AU1 - Legal Framework AU2 - Audit Planning AU3 - Internal Control AU4 - Audit vs Assurance AU5 - Financial Mis-statements AU6 - Audit Report	AU1 - Legal Framework AU2 - Audit Planning AU3 - Internal Control AU4 - Audit vs Assurance

Save to Diary

Save audit days to my calendar:

Select audit type: Company



Name: EP Student

Firm: EP Group

Registration No: epstudent1

Mentor:



[Home->My Diary](#)

[Logout](#)

## CA Diary

Your completed list of Diary entries to date

Days evidenced: 21 (0 days locked by mentor)

Credit for prior experience: 0

Total days evidenced: 21

- [▶ Add New Diary Entry](#)
- [▶ Goals and Achievements](#)
- [▶ View my Diary](#)
- [▶ Contact us](#)



Date Created	From Date	To Date	Days evidenced	Audit Days (Type)	Work Activity	Learning Level	Completed Competencies	Status
<a href="#">01-Oct-09</a>	2009-10-01	2009-10-30	21	0	Place of work	Understand	FA1 FA2 FA3 FA4	Open

As you create entries you will see your entry in the Index page



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Name: EP Student  
Registration No: epstudent1

Firm: EP Group  
Mentor:



[>>Home](#)

[Logout](#)

## CA Diary Home

Welcome to the CA Diary

**CA Professional Development**  
Read the guidelines first please (pdf)

**CA Diary Help**  
FAQ  
User Guide (pdf)

**Go To Diary**

**My Reports**  
My CA Diary of Professional Development

**Contact Us**

**Monitor your progress**



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## Summary

View your summaries to date, based on competence

Select Competencies

Detailed View:

Select Competencies

- All
- Financial Reporting
- Auditing - Company
- Auditing - Other
- Business Environment
- Taxation
- Finance
- Professional Values
- Information Technology/ Systems
- Days evidenced

- ▶ [Add New Diary Entry](#)
- ▶ [Goals and Achievements](#)
- ▶ [View my Diary](#)
- ▶ [Contact us](#)

Using the drop down menu you can check

- Days
- All areas
- Individual areas

Name: EP Student  
Registration No: epstudent1

Firm: EP Group  
Mentor:



Home->[My Diary](#)->[Summary](#)

[Logout](#)

## Summary

View your summaries to date, based on competence

Days evidenced  Detailed View:

[View Summary](#)

- [Add New Diary Entry](#)
- [Goals and Achievements](#)
- [View my Diary](#)
- [Contact us](#)

[My Diary of Professional Development](#)



### Days evidenced

Days evidenced: 0 (0 days locked by mentor)  
Credit for prior experience: 0  
Total days evidenced: 0

View of Days Evidenced

All you create your entries the total number of days will increase

You also have the ability to see what has been signed off by your mentor



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## FAQ on entries

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- Minimum of one entry per month
- Create the audit entries separately as you have to be specified in the number of audit days you are recording
- This may mean two entries a month if part of the month was audit experience
- The most importance part of the diary is the entries-this is your evidence for attaining your competencies
- When you create an entry the narrative you create in the text box is your evidence for assigning competencies
- Assign all competencies that you have evidenced e.g. FA1, PV1 and AU1
- Remember the core all PV, all CB and FA1- FA4!



The screenshot shows the website's navigation menu with 'Student Services' selected. The breadcrumb trail reads 'You Are Here - Home / Students / Student Services / CA Diary Information'. The main content area is titled 'Your CA Diary of Professional Development' and contains three paragraphs of text. The first paragraph explains that becoming a CA Trainee Member involves a period of professional development. The second paragraph describes the learning objectives and mentions the 'CA Professional Development Experience: Guidelines for Trainees' document. The third paragraph states that the diary is a web-based tool used for the Admission to Membership application. Below this is a section for 'Some Frequently Asked Questions about your CA Diary' with a list of five questions. On the right side, there is a 'TaxSource EXTRA' banner and a 'How Can I' section with links to 'Access Financial Services', 'Access CHARIOT', 'Helping you through the Credit Crunch', 'Find CPD annual declaration', and 'Find the Benevolent Association'. A search bar is located at the top right, and the Chartered Accountants Ireland logo is in the top left.

Home | Members | Students

Chartered Accountants Ireland

Home Student Services Training Organisations Shop eLibrary

You Are Here - Home / Students / Student Services / CA Diary Information

### Your CA Diary of Professional Development

On becoming a CA Trainee Member you will enter into a period of professional development, under a Training Contract with a member firm or a recognised training organisation or through the Elevation Programme launched in 2009.

During this period you will learn to apply the functional/technical knowledge to real-life situations; your broad-business skills will be developed and you will adopt the values and demeanour that befits a prospective member of the CA profession. The guidelines which govern your period of professional development are set out in the document, [CA Professional Development Experience: Guidelines for Trainees](#)

You will chronicle your development in your CA Diary of Professional Development, which is a web-based tool, and this diary will form part of your Admission to Membership application at the end of your training period.

#### Some Frequently Asked Questions about your CA Diary

1. Why have a period of Professional Development?
2. What is the CA Diary of Professional Development?
3. What is the purpose of maintaining the diary?
4. What is Competency?
5. What are the mandatory requirements?

TaxSource EXTRA

MORE DETAILS >>

How Can I

- [Access Financial Services](#)
- [Access CHARIOT](#)
- [Helping you through the Credit Crunch](#)
- [Find CPD annual declaration](#)
- [Find the Benevolent Association](#)

All information is stored on this page