This document provides information for trainees on the functionality of the CA Diary.
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Introduction

As a trainee, you are required to acquire and demonstrate the competency, skills and knowledge and professional values of a Chartered Accountant through a period of professional development. This experience must be demonstrated and approved to the required level, as part of the eligibility requirements to become a member of Chartered Accountants Ireland (the Institute). While it is good practice to keep a secure backup document, it is a regulatory requirement that the experience is documented and approved on the online CA Diary.

This guide provides you with information on how to access and use the CA Diary for the purpose of recording relevant work experience (i.e. experience which can be mapped directly to the Institute’s competency framework). The provided information applies to trainees who are gaining experience through a Training Contract and to trainees who are registered on the Flexible Route.

⇒ Please note, a detailed review of trainee CA Diary records will be undertaken, as part of the review of an application to membership. Therefore, care should be taken to ensure that experience is recorded accurately and within the stated requirements. A diligent approach to recording CA Diary experience will help to minimize any delays in admission to membership of the Institute.

IMPORTANT: Recording auditing experience

Trainees who are gaining experience in auditing
If you are a trainee, working in practice, who is gaining experience in the area of regulated, third-party, auditing, you need to know how to record this experience accurately on the CA Diary, as this has a direct impact on the Educational Requirements for the Audit Qualification. All trainees in this category must read, in detail, the document entitled ‘Guide to recording audit days_CA Diary’ before taking any steps to update your CA Diary.

Trainees who are not gaining experience in auditing
Any trainees who are not gaining experience in the area of regulated, third-party, auditing (in practice) are not entitled to record any audit days, when creating a CA Diary record. This includes trainees who are working in internal audit in practice, training in business, industry, public sector etc.

Did you use the old CA Diary?
If you used the old CA Diary platform (i.e. pre-May 2017), please refer to Appendix 1, which provides important information for you.
In addition to this guide, it is important that all trainees read and understand the information provided in the ‘Professional Development Requirements (CA Diary)’ and the ‘Sample CA Diary Entries for Trainees’ documents. Trainees gaining experience in auditing, must also read the Guide to recording audit days_CA Diary’

These documents, along with other resources, are accessible on the charteredaccountants.ie website (see Current Students > CA Diary Resources).

Logging in and navigating to the new CA Diary

CA Diary Tip: Where possible, it is recommended that you use Google Chrome when undertaking CA Diary activities, as this is the web browser which is most compatible with the new website.

To navigate to the new Diary, you must first be logged into Chartered Accountants Ireland website. To log in, you need your user ID (your student number) and password. Should you have any login issues, you can click on the ‘Forgot user ID or Password’ link, which is available on the Login page. This will allow you to generate your user name, or request a new password. Please note – your profile details, including password and e-mail address can be edited in the My Account section of the website. You must first be logged in to take these actions.

Once you are logged into the website you should be presented with a welcome message and some ‘quick links’ to commonly used webpages. Locate the ‘Student Centre’ link and click on it (alternatively, select the Current students tab and click on Student Centre). Once you are on the Student Centre page, you can check that you are logged in by looking for your name at the top right of the webpage. If you are logged in, you will see a link to the CA Diary dashboard (see below). Please note, the CA Diary link will only be displayed once trainees have either enrolled on a course or a formal registration has been approved, whichever occurs first.
CA Diary Dashboard

On accessing your CA Diary, you will see that the dashboard provides access to a menu, where you can engage in activities. There is also view-only information, specific to your training record, grouped under different banners. The information which is captured on the dashboard is also available in the CA Diary Report. To download this (PDF) document, select ‘Generate CA Diary report’ from the menu. This report also shows information on all diary entries (regardless of the status of the entry) and includes information recorded on mentor reviews.

CA Diary Tip:
In order to access/download the CA Diary report, you must disable your browser's popup blocker. You can find out how to do this here

Profile Information

Under this banner, you will see your name, student number and assigned mentor. If you do not have an assigned mentor, you need to take steps to have one appointed as a priority. Your route of entry will be shown, and – if you are in a Training Contract, your firm name. You will also see ‘Date of Registration’. This is generally the date that a training contract or a Flexible Route enrolment application was received. The date shown at ‘Date of Completion’ – which should not be confused with a Training Contract end date - is set (for all trainees) as eight years from the ‘Date of Registration’.

CA Diary Tip:
Trainees in a training contract can view the specific dates and details of their contract by clicking on the ‘History of profile information’ link.

Mandatory core competencies and Area of Experience

The grid which is shown under the ‘Mandatory core competencies’ banner, displays all core competency categories, names, codes and levels. In addition, selecting the drop down menu under the ‘Area of Experience’ banner, allows you to view all activity under the technical experience areas. All of this information is updated dynamically and should show the current status of your work experience entries. Please note: these areas will only reflect any diary entries which have a status of locked or unlocked. If you have any entries which have a status of ‘With Student’ or ‘Submitted to Mentor’, the competencies will not be reflected in the grid

Regulated experience in a practice environment (for trainees in practice gaining audit experience)

This section displays, in weeks, the amount of audit experience that has been recorded and approved on the CA Diary. This is a cumulative figure, based on all inputs in the ‘Regulated experience in a practice environment’ section of the ‘Create a new diary entry’ page. This experience, gained in
practice, through the period of approved training, forms part of the Educational requirements for an Audit Qualification. Experience in this area does not form part of the professional development requirements for admission to membership and is not to be confused with the ‘Required experience’ section (see below). The ‘Regulated experience in a practice environment’ section shows the number of audit weeks that have been demonstrated (Achieved to Date) through CA Diary activity. Note: this section only applies to trainees who have obtained experience in the area of regulated, third-party, auditing (in practice). As above, this area will not reflect any diary entries which have a status of ‘With Student’ or ‘Submitted to Mentor’

**Required experience**

This section displays, in days, the targeted number of required days, which form part of the eligibility requirements for admission to membership* (see ‘Required days’) column. The cumulative number of relevant days experience is shown under the ‘Days recorded to date’ column. This figure is derived from locked diary entries only. There is also a section which will display any awarded days, recorded under the approved ‘Prior work experience’ category. Any days recorded under this category, following approval by the Institute, are added to the required experience category to give the Total Experience figure. As above, this area will not reflect any diary entries which have a status of ‘With Student’ or ‘Submitted to Mentor’

* trainees are required to complete a specified period of Recognised Experience for Qualification (REQ), as part of the eligibility requirements for admission to membership of the Institute. For example, trainees who have an REQ period of 3.5 years will have a targeted number of days = 682.

**Other**

This section shows the cumulative number of Overtime Worked days, which were recorded (and locked) through CA Diary entries. At the end of your training period, the system will include the total number of overtime worked days as counting towards total number of required days, as part of the requirements for admission to membership. Please note, the total of overtime worked days is always separate to the total of days experience recorded to date. Therefore, in the example below, the system will treat this trainee as having 714 days experience (627 work experience days + 87 overtime days) and therefore the trainee has exceeded the targeted number of required days (682).
Out of office
This section shows all days recorded under the various leave categories. Please note, any days recorded under the TOIL category will automatically be added (in the system back-end) to your number of required days, in the same way as overtime worked days are calculated. As above, this area will not reflect any diary entries which have a status of ‘With Student’ or ‘Submitted to Mentor’.

Progress summary
This section provides a view of all diary entry and mentor review activity on the trainee record. Please note, the figure recorded next to the ‘Number of mentor reviews’ (Mentor Reviews section) captures the number of six month mentor reviews with a status of completed and request submitted. This figure does not include the final mentor review, if recorded.

Creating a Diary Entry

CA Diary Tip:
All fields on this page which have an asterix adjacent to them are mandatory fields. A diary entry cannot be saved or submitted unless all mandatory fields, including competencies, have been populated. For this reason, CA Diary entries cannot be saved or submitted which are solely for leave periods.

Before recording any information in this screen, ensure that you have read the Sample CA Diary Entries guide

Select the ‘Create a new diary entry’ option from your dashboard menu to do this. This will open up a page with a CA Diary entry template. Within this page, there are a number of collapsible sections, as noted below.
1. Timeframe
2. Diary Entry
3. Competencies Achieved

Start and End dates

Training Contract Students
When creating the very first diary entry in the system, the start date field will be blank; this is only the case if there are no other CA Diary entries on your record. When inputting your very first CA Diary entry, always ensure that the start date is the commencement date of your contract (this date can be obtained by clicking on the ‘History of Profile’ link on your main dashboard). Once you have successfully saved (or submitted) your first diary entry, the start date field will be auto-populated for
any subsequent diary entries (i.e. you cannot edit the start date). The date automatically input by the system will be the end date of previous diary entry + 1 day. For all entries, you will have to input the appropriate end date manually, as this is a mandatory field. The end date is typically around one month from the start date. Please note; work experience entries can cover up to a (maximum) period of three months.

Flexible Route Students

When creating all CA diary entries, the start and end dates will be blank. This allows flexibility as you may be gaining relevant experience at different stages and possibly at different organisations. For all recorded entries, you will have to input the appropriate start and end dates manually, as these are mandatory fields. The end date is typically around one month from the start date, however the diary entry could cover up to a (maximum) period of three months.

Accounting for leave periods

When you have input a start and end date in your diary entry, the system automatically calculates the maximum number of work experience days available - excluding weekends. It is a requirement that you also account for the number of days, within the diary entry period, for which you were unavailable to gain experience. The available leave categories are: study leave; annual leave; public/bank holiday; other leave; time off in-lieu and sick leave.

All leave days, relevant to the period of the diary entry, are captured in the section titled ‘Out of office’ (do not confuse this with being out of the office on business, e.g. on an audit; this is purely for leave periods). ➔ Remember: diary entries which are solely recorded for leave periods and contain competencies and/or days experience are not acceptable. ⇐ To add ‘out of office’ days, select the appropriate category from the ‘Leave Type’ dropdown menu and input the number of days for this category. Then click on the ‘Add’ button to include the leave. You can revisit this multiple times within a diary entry to record different types of leave. You can also remove any leave periods that have been added, if you are initially drafting an entry or it has a status of ‘With Student’.

CA Diary Tip:

As you cannot input a diary entry to solely cover periods of leave (at least one competency element must be included), include the total number of leave days, accrued within the date range of your diary entry as described above. For example, if you had a study leave period of the 1st of July until the 5th of September, you can either:

a. Extend your diary entry for the experience gained in June, to show an end date of the 5th of September and document the work experience gained and account for the number of days that you were unavailable for, or;
b. Conclude your work experience entry for June, and then start a new entry from the 1st of July. The end date of this entry could be, for example, the 30th of September. Again, you would document the work experience gained in this period (i.e. 6th to the 30th of September) and account for the number of days that you were unavailable for
Days of relevant experience within timeframe

Based on the start and end dates of your diary entry (and excluding weekends and any leave that has been added), the system will calculate the maximum number of days experience that is available within your entry. This is shown in a greyed out field, under ‘Max. number of experience days’. Above this, there is a mandatory field which you are required to populate. In this field, you must specify the number of days work experience that you are registering within the entry.

Overtime Worked

It is recognised that not all trainees will be working overtime, however the system allows trainees who do the facility to capture this experience on the diary. If you have worked overtime within the period of the diary entry being recorded, you can input the number of days in the Overtime Worked field. When recording overtime, please note that one day is equivalent to 8 hours work.

Should an instance occur when you have accrued, for example, 12 hours in the period being recorded, you would be entitled to record one day (8 hours) in the Overtime Worked field. In this scenario, you can consider including the additional 4 hours towards any overtime being recorded in future diary entries. If your employer/firm permits you to take additional time off, based on accrued overtime, this would be captured in the relevant diary entry at the time the leave is taken (see Accounting for leave periods section).

Diary entry

The diary entry section is within a collapsible banner. Click on the coloured banner to view/hide these fields. In this section the ‘Title’ and ‘Description’ fields are mandatory. If you wish, you can paste text, e.g. from a Word document, into the ‘Description’ field. If you are a trainee on the Flexible Route, you should ensure that you indicate the name of the organisation, for which you were working when you obtained the experience, in either the Title or Description field (or both). Next, select the learning level that is appropriate to your entry, by clicking on the drop down menu at ‘Learning level’.

CA Diary Tip:

Refer to the ‘Sample CA Diary Entries for Trainees’ document for information on how to record the description of your experience and considerations around selecting the appropriate learning level.

Competencies/area of experience achieved

This section is also contained within a collapsible banner. Under the ‘Competency/area of experience category’ section, click on the drop down menu and locate/select the appropriate group of competencies (e.g. Finance). Once you select the relevant group, this populates the ‘Competency/area of experience’ drop down menu. From here, select the relevant element (e.g. CF1 – Research and Interpretation). Then click on ‘Add’ to include the competency in your entry. You can visit these fields as many times as is appropriate for your entry. The minimum requirement is that you have at least one competency element added. ➔ Remember – you cannot claim competencies for periods of study
leave but you can record competencies for training periods. You can also remove any competency elements, for example, if you added one in error, provided the entry has a status of ‘With Student’ or ‘Unlocked’.

**Regulated experience in a practice environment**

This section is non-mandatory and should only be completed by trainees who are gaining experience in the area of regulated, third-party, auditing (in practice), All trainees in this category must read, in detail, the document entitled ‘Guide to recording audit days_CA Diary’ before taking any steps to update your CA Diary. Any trainees who are not gaining experience in the area of regulated, third-party, auditing (in practice) are not entitled to record any audit days, when creating a CA Diary record. This includes trainees who are working in internal audit in practice, training in business, industry, public sector etc.

**Save or Submit**

Once you have drafted your entry, you can either submit it directly to your mentor (status will then be ‘Submitted to Mentor’) or you can save it for future update/edit/submission (status will be ‘With Student’). If you have completed your diary entry successfully, you will see a blue on-screen message which will confirm that the entry has been successful. Your mentor can find information on how to review/lock diary entries in the Mentor User Guide.

**CA Diary Tip:**

If you have not completed your entry accurately, you will see a red error message ‘Please Enter valid data for Required Field and Enter Valid Dates (Start or End Date)’. If you see this message, review all elements of your entry. There is a strong possibility that you have omitted a mandatory field.

**Modifying diary entries**

The steps below describe the process for editing existing diary entries. ‘With Student’.

1. You can edit/modify any diary entries which have a status of ‘with student’ or ‘unlocked’. Whilst you can view diary entries that are locked, if you have an entry with a status of ‘Locked’ and you wish to edit it, you will have to ask your mentor to unlock the entry. If you have a diary entry with a status of ‘Submitted to Mentor’ and you wish to edit it, ask your mentor to lock, and then unlock, the entry. Alternatively, contact the Training Support Unit and we can assist.

2. To edit any entry with a status of ‘With student’ or ‘Unlocked’, go to your dashboard and click on the menu item ‘Modify an existing diary entry’ (see below).
3. Once you are on the screen which lists your diary entries, select ‘Edit’ on the entry that requires updating (see below). Please note; if the status on a previously saved diary entry is “Locked” you will only be able to view the information in a read only format.

CA Diary Tip:
If you wish to order your diary entries by start/end date etc. click on the relevant column header in the maroon coloured banner.

4. Once the relevant entry is displayed, you can edit the duration of the entry (if required), by changing information that was populated by you in the original entry. Please note, as the diary
entry start date is pre-populated (as described above) you cannot edit this date. This applies to students on a training contract only. To edit the period of a diary entry click on the calendar icon at the available field(s) (see below). If you cannot see any information under ‘Time Frame’, click on the banner and the saved information will be available to view/edit. ➔ Please note, the system will not allow you to alter diary entries which would result in entries being recorded for overlapping periods 

5. Within the relevant diary entry, you can either add or remove any leave periods. To add a leave period, select the appropriate category of leave from the drop down menu (‘Leave Type’). Then insert the appropriate number of days – specific to the category of leave - within the recorded diary entry. You may make multiple selections in one diary entry. For example – one day for a public holiday plus one day for annual leave. To remove a leave entry, look under the ‘Leave Added’ heading, where you will see recorded leave periods pertaining to the entry. To remove a leave entry, simply click the ‘Remove’ button.

6. You can also edit any of the information contained within the ‘Diary entry’, ‘Competencies/area of experience achieved’ and ‘Regulated experience in a practice environment’ sections. You may need to click on the collapsible banners to view/edit the information.

**Requesting a six-monthly mentor review**

You should select the option to request a six monthly review (as shown below) when:

- You have completed six months of your training contract, or;
- You have recorded six months experience on the diary (Flexible Route trainees), or;
- Six months has elapsed since the last review was recorded for you
When you take the action to request a six month review, this request will appear on your mentor’s dashboard. You will not be able to request a further review until the initial request has been actioned. Please ensure that your mentor is aware that this activity is outstanding and that you have work experience entries which require review. Your mentor can find information on how to action review requests in the Mentor User Guide.

Requesting a final mentor review and applying for membership

You will also have the ability, through the CA Diary dashboard, to request a Final Mentor Review. This link will only become available to you once all of the following conditions have been met:

- You have met the requirements below and your training contract has expired (contract trainees only)
- You have met the requirements below and completed, at a minimum, your required period of experience (flexible route trainees)
- All diary entries have a status of “Locked” and there are no outstanding requests for a six-month review
- All competency requirements are met
- The minimum number of required days, based on your own requirements, have been attained and evidenced through the diary (see the ‘Required experience’ section of your dashboard)
- A minimum of FIVE Mentor Reviews (six-month reviews) have been recorded \(\Rightarrow\) please remember – the count of mentor reviews shown on your dashboard relates only to six month reviews (completed and requested) and does not include the final mentor review in the tally \(\leftarrow\)

The system runs an **overnight search** to determine any trainees who have met all eligibility requirements noted above. Therefore, if the last activity by your mentor, e.g. to lock the last diary entry, was taken on a Tuesday, you should see the link to request a final review on your dashboard on
the Wednesday (provided that you have met all of the above stated criteria). You also have a menu option on your dashboard to view completed mentor reviews.

**CA Diary Tip:**

If you still have elements of the FAE outstanding but have completed your training period, you should proceed and complete your CA Diary up to and including the Final Mentor Review (assuming that you have met the above requirements). There is **no** need to wait until you have completed the academic programme.

**Application to membership**

In addition to having successfully completed the Institute’s examinations and having completed your training requirements, you are required to have a completed CA Diary record. This means that your Diary record must:

- Provide evidence that you have served the requisite number of days, through documented work experience as part of a Training Contract or through the Flexible Route
- Detail all periods of ‘out of office’ leave (e.g. study leave) throughout the duration of your Training Contract. Please note – trainees who completed their training through the Flexible Route and have diary entries which were created in the old CA Diary do not need to retrospectively input out of office leave periods. If you have any questions around documenting leave periods, please contact the [Training Support Unit](#)
- Provide evidence that the competency requirements have been met (see below).
- Detail a minimum of six mentor reviews (including the Final Review)

**Completing the application to membership**

The diagram below shows the process which will be followed, culminating in the availability of an option to apply for associate membership of the Institute, for eligible trainees. Once the eligibility criteria - as described above - have been met and a final review is completed, you should, following a further overnight process, have the option of applying for membership. Following this process, the online application link should be available to you, when logged into the system, in the ‘My Account’ section of the website. Information on the application process, along with other relevant details, can be located by accessing the webpage on Admissions to associate membership

Tip: If you experience difficulties with the online application, please contact the [Admission to Membership team](#)
CA Diary completed

Following overnight process, Final Review option becomes available

Following completion of Final Review, further overnight process and then application to membership becomes available

Support

If you have any queries on the content of this document, or are experiencing any difficulties with the CA Diary please e-mail the Training Support Unit

Document ends, appendix to follow.
Appendix 1: Information for trainees who used the old CA Diary system

Firstly, it is important to note that, whilst the way that experience (and mentor reviews) are recorded and approved in the new CA Diary differs to that of the old system, the requirements for admission to membership have not changed. This means that you will still have to regularly (approximately once a month) record CA Diary entries and your mentor will have to review/approve your experience and record mentor reviews for you at least twice a year. By the end of the training period, you need to have demonstrated that you have met the professional development requirements and have passed the FAE in order to become eligible to apply for admission to associate membership of the Institute.

Some of the key functionality differences of the new system and some relevant points for consideration are noted below. Please note, any information which was recorded in the old CA Diary, including diary entries, leave totals, audit days and mentor reviews, will have been transferred over to the new diary.

- Access to the new diary is through a different website link to that of the old CA Diary. If you have saved the link to the old CA Diary in your favourites on your browser, it is recommended that this is removed or updated.

- On first-time access to the new website, use your student number and existing password to log in. On a one time basis, following initial access, you may be required to reset your password. This is to maintain security and is a very easy-to-follow process.

- Instead of having a CA Diary ‘Control Panel’, or homepage, trainees and mentors have an individualised CA Diary dashboard.

- If you have diary entries which were recorded in the old CA Diary and were unlocked, these will have transferred over with a status of ‘With Student’. Following your review of these entries, you will need to submit for approval.

- If you recorded entries in the old system, but had no mentor assigned at the time, you will not be able to view or edit these entries. Please contact the Training Support Unit and we can assist you with this issue and allow you to progress with these entries.

- If you have mentor reviews which were recorded in the old CA Diary, and they did not have a title, you won’t have a hyperlink to view the content. However, you can view this content in your CA Diary report.

- Trainees can now submit a request to their mentor to carry out reviews from the CA Diary dashboard. Please note: there is no functionality enabled where the system will produce
automatic e-mail reminders to mentors or trainees for outstanding review activity. You will have to contact your mentor when you require mentor approval and/or reviews to be completed.

- The old CA Diary allowed trainees to have diary entries with overlapping time periods and to have time gaps in the recorded experience record. The functionality of the new CA Diary does not permit this for any new diary entries in the case of Training Contract students. If you are recording experience as a Training Contract student, please note that any new entries that are recorded in the new system must be documented consecutively in chronological date order. If you are recording experience as a Flexible Route student, it is possible to have time gaps between your diary entries however the system will not permit diary entries with overlapping periods.

- On reviewing your CA Diary entries which transferred over from the old system, it is possible that you have time gaps between entries. Should you need to amend your record to capture experience that you gained in these periods, you will not be able to create new entries, as the start date is pre-populated. Should this occur, you can ask your mentor to unlock the entry (or entries) which precede the period you wish to capture. You can then extend the end date of the preceding diary entry and include all relevant information for the entire period that you wish to document. Should you require advice on how best to approach this, please e-mail the training support unit.

- Flexible Route trainees and trainees gaining experience through a Training Contract will use the new CA Diary in the same way for all new activities. The only exception to this is on the ‘create a diary’ entry start date field (see the ‘Creating a Diary Entry’ section of this guide for details).

- There is no longer a separate CA Diary calendar, as would have been used previously by trainees on Training Contracts. Instead, any ‘out of office’ leave periods (e.g. study leave), are captured within the body of a diary entry. The same applies to the way in which audit days are captured, for trainees who are gaining experience in this area. Please note: any leave totals and audit days that were captured in the old CA Diary calendar have been converted to the new system by showing the cumulative totals in the first diary entry.

- You now have the option of recording any overtime days worked within the body of a new CA Diary entry. The system will include the total number of overtime days as counting towards your required experience total. Please note, any days recorded in the old system under the TOIL category will automatically be added (in the system back-end) to your number of required days.

- There is now an online application for admission to membership. This link becomes visible as an option (in the My Account section) after a final mentor review has been submitted (overnight process – see above).