Qualification Programme (QP)

Practical Experience Online System
(Online Training Records for Counselor)

User Guide

Online Training Records (Counselor)

User Guide

This user guide shows how the Counselors complete the following tasks via the online system.

When to access

(1) **Review and sign off of Training Records** submitted by the QP students (refer to P.2 for details)

(2) **Update of the appointment end date as a Counselor** (refer to P.5 for details).

How to know QP students submit the Training Records

You will receive an email notification once your QP students submitted the Training Records for your review and annual sign off. Please review and sign off on the Training Records at least on an annual basis.

Where to access

You can login the Practical Experience Online System and access to the Landing page.

Illustrative example:
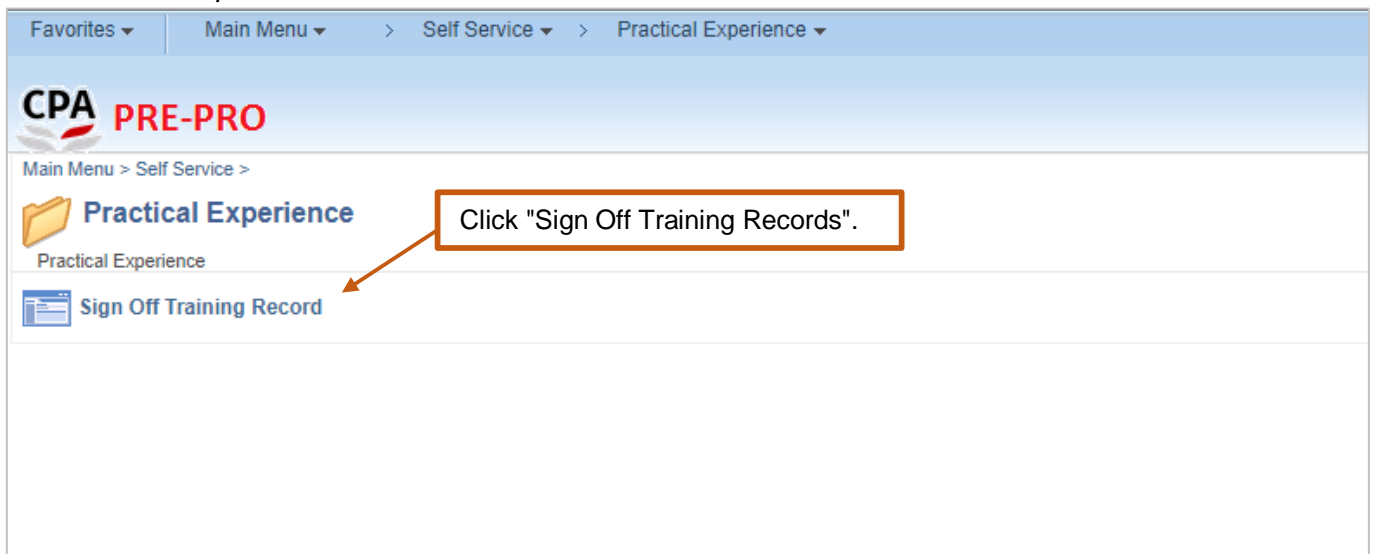
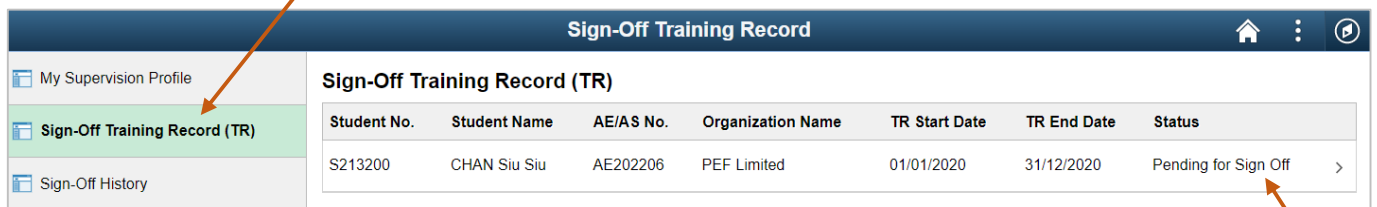After login, please follow the steps below to review and sign off of Training Records.

(1) How to review and sign off of Training Records

Note: You can click the information icon 🛈 to view reminder notes under different sections.

Please follow the steps below to complete the review and sign off of online Training Records.

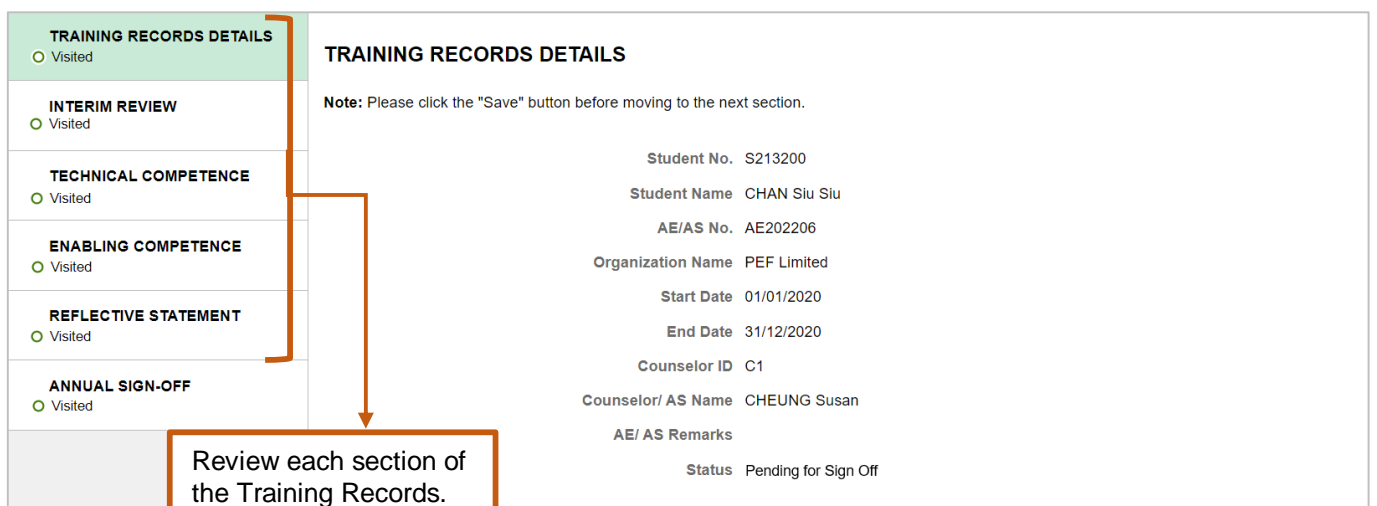**Step 1:** **Find** the Training Records pending for sign off

(1) Click "Sign-Off Training Record (TR)" tab.

	Sign-Off Training Record						
My Supervision Profile	**Sign-Off Training Record (TR)**						
Sign-Off Training Record (TR)	**Student No.**	**Student Name**	**AE/AS No.**	**Organization Name**	**TR Start Date**	**TR End Date**	**Status**
Sign-Off History	S213200	CHAN Siu Siu	AE202206	PEF Limited	01/01/2020	31/12/2020	Pending for Sign Off >

(2) Click the record to open the Training Records.
Note: You can view all the submitted Training Records (pending for sign off) under this grid table.

Step 2: **Review** the Training Records

	TRAINING RECORDS DETAILS
TRAINING RECORDS DETAILS ○ Visited	**TRAINING RECORDS DETAILS**
INTERIM REVIEW ○ Visited	Note: Please click the "Save" button before moving to the next section.
TECHNICAL COMPETENCE ○ Visited	Student No. S213200
	Student Name CHAN Siu Siu
ENABLING COMPETENCE ○ Visited	AE/AS No. AE202206
	Organization Name PEF Limited
REFLECTIVE STATEMENT ○ Visited	Start Date 01/01/2020
	End Date 31/12/2020
ANNUAL SIGN-OFF ○ Visited	Counselor ID C1
	Counselor/ AS Name CHEUNG Susan
	AE/ AS Remarks
	Status Pending for Sign Off

Review each section of the Training Records.

Step 3: **Approve/ Push Back** the Training Records

ANNUAL SIGN-OFF

Save

QP Student Comment

Hi Susan, the Training Records of the Year 2020 is ready for your review and sign off. Thanks.

Click "Save" button to save your comments (if any).

Counselor/AS Comment (Optional)

Sign Off   Push Back

Push Back the Training Records
If push back the Training Records to the QP student for revision:
(1)   Input comments for your QP student's reference (if any), and
(2)   Click "Push Back" button to route the Training Records to the QP student for amendment.

Note: Counselor is not able to edit the content of the Training Records.

Approve the Training Records
(1) Click "Sign Off " button.

Cancel   **Confirmation**

☐ I confirm that the QP student is under my supervision for the period as stated;

In my opinion, the selected person:

has acquired the practical experience by achieving the Technical Competences and the Enabling Competences as recorded; and

has completed the Reflective Statements

I declare that, to the best of my knowledge and belief, the information provided in the Training Records is true and correct as at this date.

(2) Check the box to make declaration.

(3) Click "Confirm" button to sign off the Training Records.

Confirm

▼ **Details of Counselor/AS**

Name of Counselor/AS   CHEUNG Susan

Job Position   Finance Director

HKICPA Membership No.   F07520

Professional Accountancy Body

Membership/License No.

Approval Date   08/07/2022

Details of the person who sign off the Training Records will show here.

Once you sign off, the related Training Records will automatically update to "Sign-Off History".

	Sign-Off History							
My Supervision Profile								
Sign-Off Training Record (TR)	Student No.	Student Name	AE/AS No.	Organization Name	TR Start Date	TR End Date	Status	Annual Sign Off Date
Sign-Off History	S213200	CHAN Siu Siu	AE202206	PEF Limited	01/01/2020	31/12/2020	Signed Off	08/07/2022 >

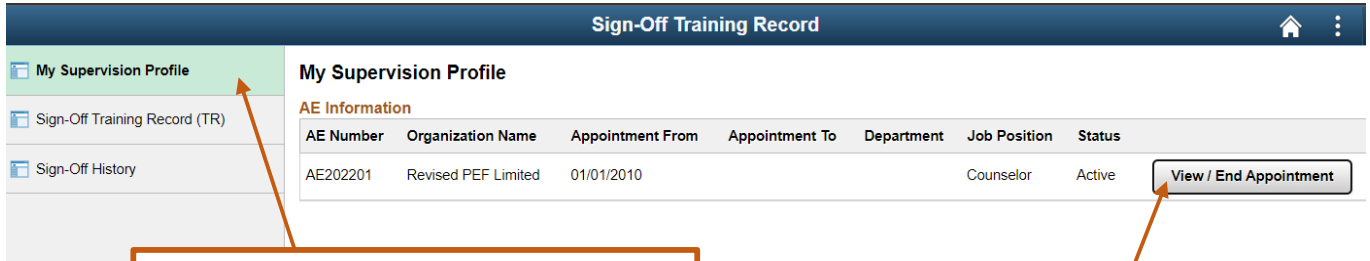Click "Sign-Off History" tab.

Approved details.

Note:

1. *After you sign off the Training Records,* *the QP student will receive a confirmation email and the Training Records status will change to **"Signed Off"**.*

2. *When you push back the Training Records, the QP student will receive an email notification and the Training Records status will change to **"Push Back"**.*

3. *You can go to the "Sign-Off History" tab to view the signed Training Records when necessary.*

END

(Training Records - Annual sign off)

(2) How to update the "Appointment End Date" as a Counselor

Procedures:

Sign-Off Training Record								
My Supervision Profile	**My Supervision Profile**							
Sign-Off Training Record (TR)	**AE Information**							
Sign-Off History	AE Number	Organization Name	Appointment From	Appointment To	Department	Job Position	Status	
	AE202201	Revised PEF Limited	01/01/2010			Counselor	Active	View / End Appointment

(1) Click "My Supervision Profile" to view your appointment details.

(2) Click "View/ End Appointment" button to proceed.

- You can refer to the grid table under "Active Student" to check the **QP students who are under your supervision** anytime.

- If you would like to **cease to act as an AE-Counselor** of your organization, please follow the below instructions.

Illustrative sample:

(1) Input "Appointment End Date".
Note: "Appointment End Date" means the last date to act as an AE-Counselor.

(2) Input "Supervision End Date" of your QP students (if any).
Note: "Supervision End Date" means the last date of the supervision period with your QP student (which should not be later than Counselor's "Appointment End Date").

Cancel		**View/ End Appointment**				
Appointment End Date						

Active Student

Student No.	Student Name	AE Number	Organization Name	TR Type	Supervision Start Date	Supervision End Date
S124528	WONG Ka Man	AE202201	Revised PEF Limited	Online	01/01/2018	
S053185	LEE Ka Ling	AE202201	Revised PEF Limited	Paper	01/01/2018	

0 Training Records pending for your sign-off!

This reminder shows the number of Training Records currently pending for your review and sign off.

Note:

1. If you wish to cease to act as a Counselor or terminate your supervision with the QP students, please input the dates in the relevant fields and click "Submit" button.

2. Please complete review and sign off all outstanding Training Records of the QP students within 90 days from the "Appointment End Date"

3. Please communicate with the MIC/ MIC Deputy/ SC for the assignment of new Counselors to each QP student if necessary.

Submit

(3) Click "Submit" button.

Note: After submission, you will receive a confirmation email.

Enquiry
Please send email to pef-enquiry@hkicpa.org.hk.

END

(Update Counselor's status)