



Hong Kong Institute of
Certified Public Accountants
香港會計師公會



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) [View the QP student list](#) who is under your supervision under the AE scheme.
- (2) [Review and sign off of online Training Records](#) submitted by the QP students

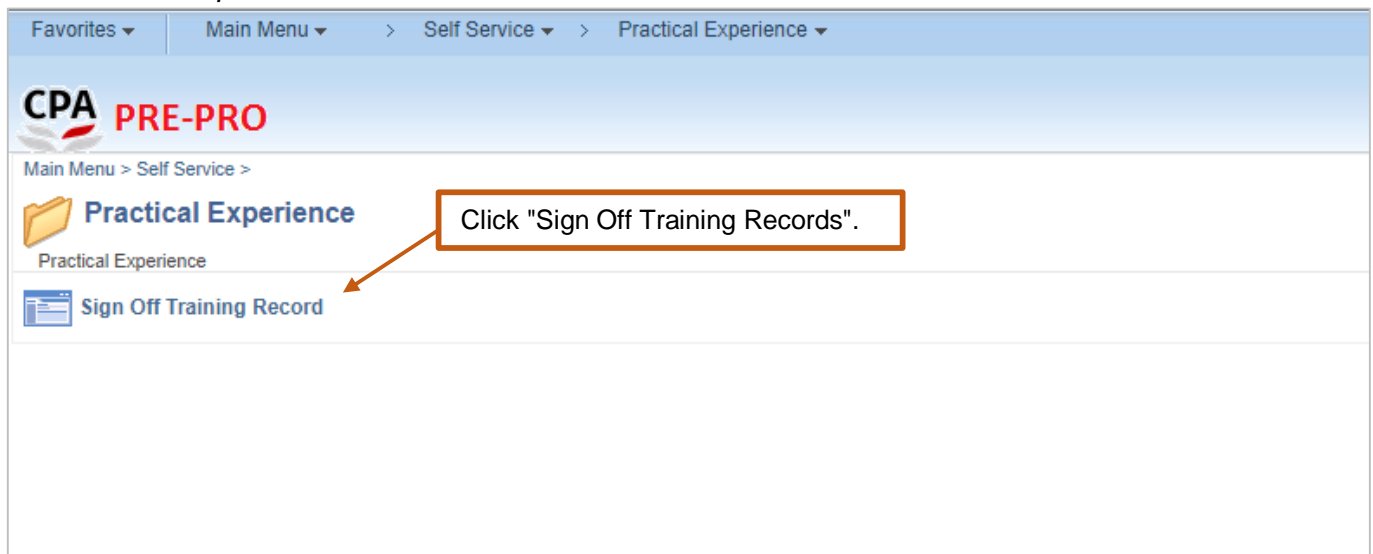
How to know QP students submit the Training Records

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:



(1) How to view the list of QP student who is under your supervision under the AE record

Sign-Off Training Record

My Supervision Profile

AE Information

| AE Number | Organization Name | Appointment From | Appointment To | Department | Job Position | Status |
|-----------|---------------------|------------------|----------------|------------|--------------|--------|
| AE202201 | Revised PEF Limited | 01/01/2010 | | | Counselor | Active |

QP student list

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

(2) Click "QP student list" button.

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

Illustrative sample:

Cancel **QP student list**

Active Student

| Student No. | Student Name | AE Number | Organization Name | TR Type | Supervision Start Date |
|--------------|-----------------|-----------|---------------------|---------|------------------------|
| S [REDACTED] | WONG [REDACTED] | AE202201 | Revised PEF Limited | Paper | 01/01/2018 |
| S [REDACTED] | LEE [REDACTED] | AE202201 | Revised PEF Limited | Paper | 01/01/2018 |
| S [REDACTED] | NG [REDACTED] | AE202201 | Revised PEF Limited | Online | 01/01/2023 |

0 Training Records pending for your sign-off!

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

If you would like to review the submitted Training Records of your QP students, please follow the steps on **(2) How to review and sign off of Training Records**.

(2) 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.

| Student No. | Student Name | AE/AS No. | Organization Name | TR Start Date | TR End Date | Status |
|--------------|--------------|-----------|-------------------|---------------|-------------|----------------------|
| S [REDACTED] | 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

Note: Please click the "Save" button before moving to the next section.

Student No. S [REDACTED]
Student Name CHAN Siu Siu
AE/AS No. AE202206
Organization Name PEF Limited
Start Date 01/01/2020
End Date 31/12/2020
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.

Counselor/AS Comment (Optional)

Sign Off **Push Back**

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

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.

Confirmation **Cancel**

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.

Confirm

Details of Counselor/AS

| | |
|-------------------------------|------------------|
| Name of Counselor/AS | CHEUNG Susan |
| Job Position | Finance Director |
| HKICPA Membership No. | F [REDACTED] |
| Professional Accountancy Body | |
| Membership/License No. | |
| Approval Date | 08/07/2022 |

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

(2) Check the box to make declaration.

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

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

| Student No. | Student Name | AE/AS No. | Organization Name | TR Start Date | TR End Date | Status | Annual Sign Off Date |
|-------------|--------------|-----------|-------------------|---------------|-------------|------------|----------------------|
| S | 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.

Enquiry

Please send email to pef-enquiry@hkipa.org.hk.