CA | THE INSTITUTE OF CHARTERED ACCOUNTANTS OF SRI LANKA

Online Training Record
Delegated User's Guide

YOU ARE ADVISED TO READ THE CONTENTS OF THE USER GUIDE CAREFULLY BEFORE MAINTAIN THE RECORDS.
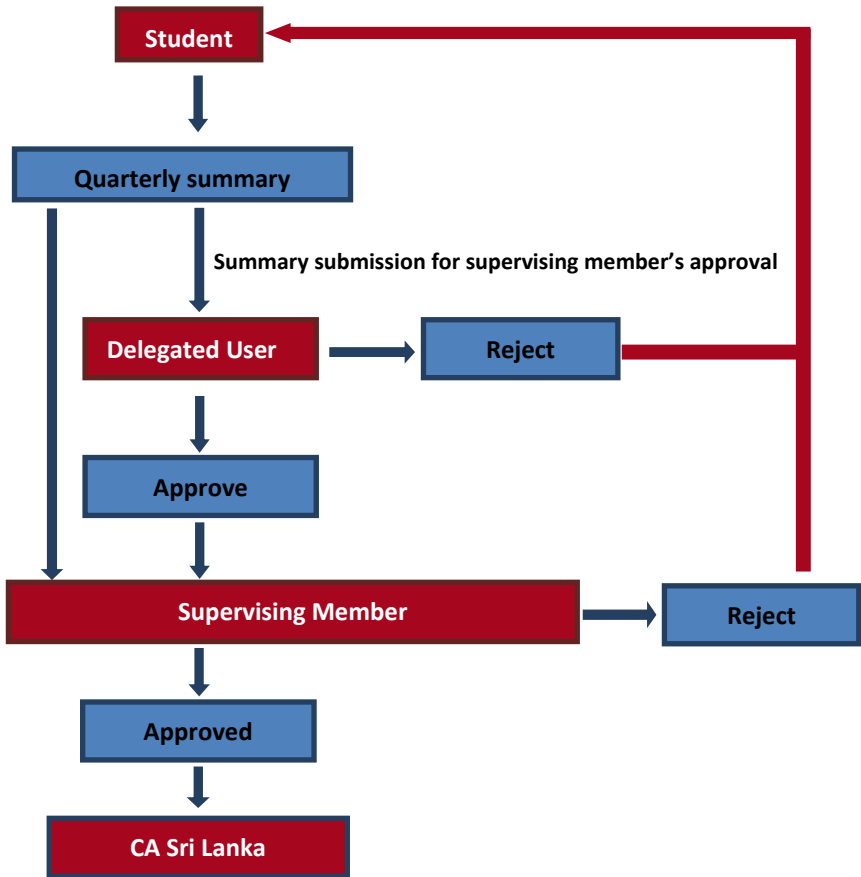
The Institute of Chartered Accountants of Sri Lanka

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https://casrilanka.com

What is Online Training Record system ?

Online record / E- record facility was introduced by CA Sri Lanka for the students to maintain daily training records & submit quarterly summaries through the web site, instead of the existing manual record book. Also the supervising members can view/approve those records through the web site.

Entire process of the online submission system

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                    ┌─────────────┐ ◄─────────────────────┐
                    │   Student   │                       │
                    └──────┬──────┘                       │
                           │                              │
                    ┌──────▼───────────┐                  │
                    │ Quarterly summary│                  │
                    └──────┬───────────┘                  │
                           │                              │
         Summary submission for supervising member's approval
                           │                              │
                    ┌──────▼──────┐      ┌──────────┐      │
                    │Delegated User│────►│  Reject  │──────┤
                    └──────┬──────┘      └──────────┘      │
                           │                               │
                    ┌──────▼──────┐                        │
                    │   Approve   │                        │
                    └──────┬──────┘                        │
         ┌─────────────────▼─────────────────┐   ┌─────────┐
         │       Supervising Member          │──►│ Reject  │
         └─────────────────┬─────────────────┘   └─────────┘
                    ┌──────▼──────┐
                    │   Approved  │
                    └──────┬──────┘
                    ┌──────▼──────┐
                    │ CA Sri Lanka│
                    └─────────────┘
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Browser / Version Requirements

Browser	Version
Firefox	23 or above
Google Chrome	26 or above
Internet Explorer	8.x ,9.x

Note : Java script should be enabled in your browsers.

Login to Organization area of the CA Sri Lanka Website

- Go to the CA Sri Lanka website "https://casrilanka.com" & Click "Member|Student login" in the top right hand corner in the website.
- Tick on "Organization"
- Use your login ID & Password to login in to organization user area of the CA Sri Lanka website.

How to access the Online Training Record Book.

Steps :

- Login to "Organization User" area of the CA Sri Lanka web site.
- Click on the link "Training Record Book Manager" Then you can see all available record books of your trainees under each category.

Purpose of Each Tab

All	- All students who working/worked under your supervision
Completed	- All completed record books
Summaries for Approval	- Record books of the students who have submitted the summaries for the recommendation

Once a student submits a quarterly summary for recommendation/approval, Delegated user will get an automatic / system generated email.

Steps to make corrections & add comments to weekly record (If Required)

- Select the relevant student from the list

- To view weekly records, click "Weekly Summary"

- Click on number of the week you want to view

All | Completed | Quarterly Summaries for Recommendation

Weekly Detailed Summary

Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 | Week 8 |

Quarter Summary

Week Name	Week Date Range	Quarter Name
Week 1	2013-01-22 - 2013-01-27	Quarter 1
Involvement	No of Leave	
N/A	0	

Details

Date	Org. Category	Exp. Category	Details of work Done	No of days spend	Level of involvement	Remarks	SM Remarks
02/09 & 03/09	E	1.2	Check the accuracy of debtors age analysis	2	A	Note 01	
04/09 & 06-09	E	2.3	Verified trade debtors	2	A		
05/09			Leave				

Note 01

Notes related to "Note No 01"

- Go to "Remarks for Student" area

- Add your comment & click " Add Remarks"

Note -

Once you changed or add comments to the weekly records, it will automatically overwrite the records updated by the student. Therefore make sure to add comment or change records as per the sample given above.

- After checking all the weekly summary details, you have a facility to give your final comment.

- If any correction need to be done by the student you may reject the quarterly summary . Otherwise student will not be able to make any correction relevant to the quarterly summary.

Steps to Reject a Quarterly Summary

- Go to the relevant student 's quarterly summary

- Type your final comment in the given box & click "Add Comment"
- Select "**Reject**" & Click " Submit Recommended Status"
- Then selected summary will be rejected & student can make any changes to that summary

Steps to Recommend a Quarterly Summary

- Type your final comment in the given box & click "Add Comment"

- Select "**Recommend**" & Click " Submit Recommended Status"

- Then selected summary will be recommended & it will automatically informed to the supervising member as well as the student

Note

Please make sure to recommend/ approve a summary with correct details. Because final approval that you are given is irreversible

Key Organization Categories

A. Manufacturing / Processing

B. Banking / Finance / Insurance / Leasing

C. Travel

D. Agriculture

E. Services

F. Local Trading

G. Hotels

H. International Trading

I. NPO / NGO

J. State Corporations & Statutory Boards

K. Others

Delay in Submitting quarterly summaries

Quarterly summaries should be submit to the training division within 30 days from the last date of your quarter.

Eg. If training commenced on 04th March 2012

	Starts on	Quarter end on	Hand over before
Quarter 1	4th March 2012	3rd June 2012	3rd July 2012
Quarter 2	4th June 2012	3rd September 2012	3rd October 2012
Quarter 3	4th September 2012	3rd December 2012	3rd January 2013
Quarter 4	4th December 2012	3rd March 2013	3rd April 2013

Failure to submit Quarterly Progress Reports, within thirty days from the last day of each Quarter amongst other things, will render the trainee to his / her training period being extended.

The Training Requirement for Certificate to Practice Eligibility

Completion of two years (440 working days) of training in a Public Practice (Audit) organization approved for Strategic level training with a minimum of 50% experience related to **statutory audits after completing Final I Examination or after being eligible for DAB or SCBA.**

Students are eligible for DAB after completion of both S I examination and one year (220days) of Strategic level training

Students are eligible for SCBA after completion of both Business Level examination and Business Level Training (220days)

Minimum Training Requirement (Curriculum 2015)

Experience Category	Public Practice Organization			Non-public Practice Organization		
	Executive	Business	Corporate	Executive	Business	Corporate
Financial Accounting & Reporting	40	50	50	80	90	90
Compliance & Assurance	80	75	75	20	20	20
Taxation	10	15	15	10	15	15
Management Accounting & Finance	-	-	-	20	20	20
Use of Information Technology	20	25	25	20	25	25
Secretarial Practice	-	5	5	-	-	-
Total	220	220	220	220	220	220

Minimum Training Requirement (Curriculum 2010)

Experience Category	Public Practice Organization		Non-public Practice Organization	
	Certificate Level	Strategic Level	Certificate Level	Strategic Level
Financial Accounting & Management Accounting	40	100	100	180
Audit & Assurance	80	150 (note vi)	-	40 (note i)
Taxation	10	30 (note ii)	10	30 (note ii)
Financial Management	-	-	20	40
Use of Information Technology	20	50	20	50
Secretarial Practice		10	-	-
Total	220	440	220	440

Notes

i. In the absence of an Internal Audit Division, the experience on Financial Management category should be increased to 40 days per year

ii. At the Strategic Level training, minimum of 25% of total requirement in Taxation should be in Income Tax as indicated under **3.1** & **3.2** categories.

iii. The days attending for training programmes or any workshops conducted by the CA Sri Lanka or any other recognized training organization will be considered as working days.

iv. Any difference between the minimum training requirement per annum (220 days) and the total minimum training requirement in accordance with each experience categories per year can be completed using any experience category listed in the above table.

v. Any trainee who fails to obtain the specified minimum number of days in Information Technology or Taxation will be required to undergo training in courses that are conducted by the IT Faculty and the Taxation Faculty of the CA Sri Lanka.

vi. The training requirement for Certificate to Practice eligibility is specified in page number 06 of this Guide.

Outline Competencies Notes to the Supervising Members

Technical Knowledge

1. Applying theoretical knowledge to practical work.
2. Performing technical tasks as assigned, applying common sense.
3. Drawing logical conclusions from available information and work performed.
4. Identifying problems and taking prompt and appropriate action.
5. Producing organized, well documented work papers for tasks assigned.
6. Applying appropriate IT skills.
7. Analytical Skills.
8. Awareness of specific industry practices such as financial institutions, insurance etc.

Project Management

1. Aware about the needs to provide an effective and timely service.
2. Understands the business environment.
3. Manages the assignment in an appropriate and adaptable way.
4. Communicates the progress of the assignment to colleagues and clients.
5. Is able to accept responsibility for more than one assignment at a time and priorities effectively.
6. Works effectively within a team, taking a leadership role appropriately.
7. Identifies opportunities to improve efficiency on assignments.
8. Complete job within exact time and meet deadlines.
9. Ability to manage conflicts.
10. Ability to take decisions under pressure.

Communication Skills

1. Presenting information in written form.
2. Presenting information in numerical form.
3. Presenting information using images.
4. Dealing with individuals in person (includes clients and subordinators).
5. Taking part in meetings.
6. Making Presentations.
7. Soft skills.
8. Client relationship, negotiation skills etc

Information Technology

1. Using information sources.
2. Using databases, spreadsheets and word processing systems
3. Using Accounting packages & presentation packages.
4. Understanding on General controls and Applications.
5. Knowledge on security reviews and application of such knowledge to the work environment.

Commercial Awareness

1. Developing existing clients.
2. Enhancing the organization's business profile.
3. Identifying clients' aims.
4. Analyzing clients' business environments.
5. Preparing recommendations for clients.
6. Team works.
7. Contributing to profit efficiency.
8. Impressing clients.
9. Project management.

Secretarial Practices

1. Practical Knowledge on companies Act requirements,
2. Practical Knowledge on difference forms and the purpose of using them
3. Understanding on the statutory documents need to be maintained by a company and practical experience on checking.

Institute's Main Regulations Regarding the Training

26 Training Record and Progress Report

Every registered students shall keep a training record in such manner and form as may be pre- scribed by the Council. The Training record shall be property of the Institute.

27 Certificate by Head of Training Institution or His Authorized Representative

The training record and the progress reports shall be certified by the head of the institution in which the registered student is undergoing training or his authorized representative to the effect that the particulars given a true record of the training acquired by the registered students.

28 Supervision of Practical Training

No training will be recognized unless it is supervised by a member of the Institute authorized or engaged by the Council to supervise such training.

29 Certificate by Supervising Members

Members of the Institute authorized or engaged by the Council to supervise the practical training of registered students shall give a certificate on the nature and adequacy of such training in such form and manner as may be prescribed by the Council.

33 Training Agreement

A registered student will be required to enter in to an agreement with Institute in relation to practical training and the registered student shall comply with such requirements.