

CA



THE INSTITUTE OF
CHARTERED ACCOUNTANTS
OF SRI LANKA

Online Training Record

Member's User Guide



**CA TRAINING
RECORDS**

**YOU ARE ADVISED TO READ THE CONTENTS OF THE
USER GUIDE CAREFULLY BEFORE APPROVE THE RECORDS.**

The Institute of Chartered Accountants of Sri Lanka

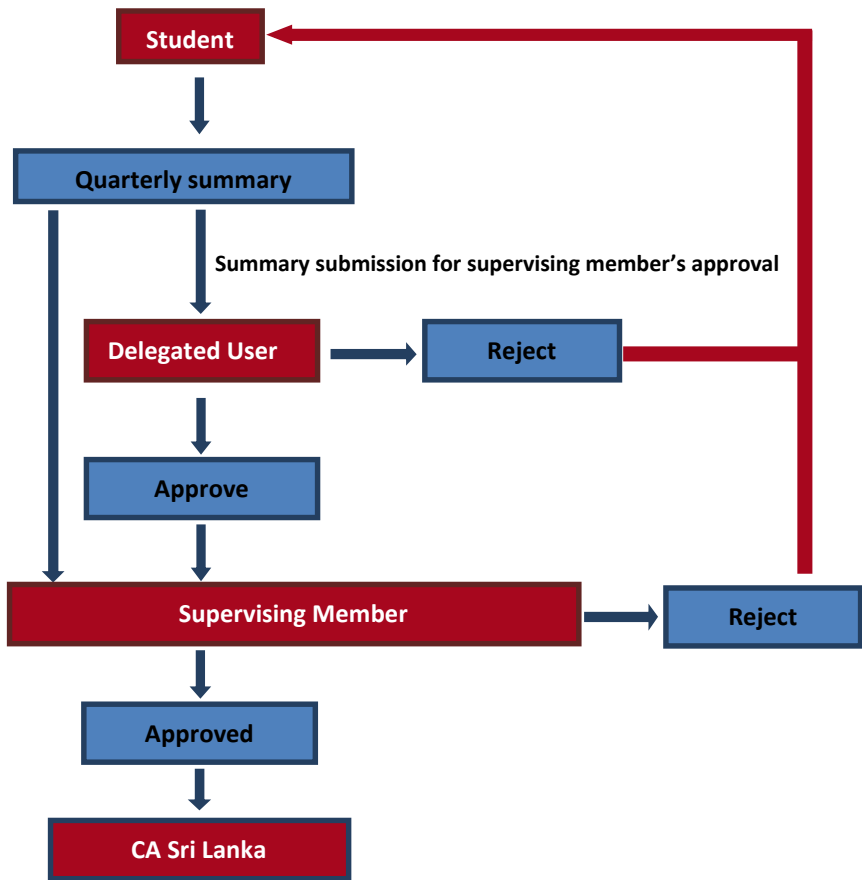
30 A, Malalasekera Mawatha, Colombo 07, Sri Lanka.

<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. Supervising members can also view & approve those records through the web site.

Process of the online record submission system



Browse / 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 Members area of the CA Sri Lanka Website

- Go to the CA Sri Lanka website "<https://casrilanka.com>" & click "[Members|Student login](#)" in the top right hand corner in the web site.
- Then you can login to the members area of the CA Sri Lanka Web site. Your username and password would be as follows :

User Name : Membership Number

Password : First four digits of your National Identity Card Number (NIC) or the Passport Number which you have submitted to the Institute.

***Please ensure to change your password upon your first login.**

How to Access Online Training Record Book.

Steps :

- Login to "Members" 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.

[HOME](#) [ABOUT US](#) [MEMBERS](#) [STUDENTS](#) [TECHNICAL](#) [FACULTIES](#) [BUSINESS SCHOOL](#) [DEGREE PROGRAMME](#) [PRESS ROOM](#) [JOB BANK](#) [VIDEO SHARING](#)

MEMBER MENU

- My Home
- My Information
- Update Information
- Update Password
- Member Forum
- My CPD
- Certificate/Transcript Requests
- Training Recordbook Manager**
- My Invoices
- Renew My Membership
- Advance Payments
- Students Seeking Training Opportunities

All Completed Summaries for Approval

Linked Recordbooks

Search By Agreement Number Or Student Registration Number:

No	Year	Student Name	Agreement Level	Status	Training Period	Training Organization
49601	1	Trainee 01	Strategic	Active	2013-07-09 / 2014-07-08	Training Organization →
46666	1	Trainee 02	Certificate	Active	2012-12-03 / 2013-12-02	Training Organization →

Purpose of Each Tabs

All - To view all students who are working/worked under your supervision

Completed - To view all completed record books (Expired & Approved)

Summaries for Approval - To view all quarterly summaries submitted for the approval

Once a student submits a quarterly summary for approval, Supervising member will get an automatic / system generated email.

*Special note

*If you are not receiving emails please update your email address to your profile given in the CA Srilanka web site.
(Please refer page number 08)*

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”](#)

[All](#)
[Completed](#)
[Summaries for Approval](#)

Quarter Training Summaries for Approval

Agreement No	Year	Student Name	Quarter	Start Date	End Date	
99777	1	Name of Trainee	Quarter 01	2014-10-18	2015-01-17	Weekly Summary Quarter Summary

- Click on Week Number

[All](#)
[Completed](#)
[Summaries for Approval](#)

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"

Remarks for Student

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"

- Add your comment & click “Add Remark”

Remarks for Student

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	03
04/09 & 06-09	E	2,3	Verified trade debtors	2	A		02
05/09			Leave				01

Note 01

Notes related to "Note No 01"

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Remarks No-

01 - should be a half day

02 - Need to Change Exp Category

03 - Need to Change organization Category

Add Remark

[Back](#)

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 comments or change records as per the sample given above.

- After checking all weekly summary details you have a right to give your final comment.
- If there are any corrections 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
- Select “No” from the drop down list given under “I Agree”

I Agree

No

No

Yes

- Click “[Notify Student](#)”

Notify Student

Back

- Then selected summary will be rejected & student can make any changes to that summary

Steps to Approve Quarterly Summary

- Go to the relevant student’s quarterly summary
- See the delegated users recommendation status & comments (If There is a Delegation)

Recommendation Status of Delegate Users

Delegated User	Recommendation Status	Comment
Name of the Delegated User	Approved	Technical Knowledge - Good Project Management - Good Communication Skills - Excellent IT - Average Attitudes & Conduct - Good

- Fill “Supervising member’s report on progress”

Supervising Member's Report on Progress

Technical Knowledge

-- Select Type --

Project Management

-- Select Type --

Communication Skills

-- Select Type --

Information Technology

-- Select Type --

Commercial Awareness

-- Select Type --

Attitudes & Conduct

-- Select Type --

- Select “Yes” from the drop down list given under “I Agree”

I Agree

No	▼
No	
Yes	

- Click “ [Approve Quarter Details](#)”

Approve Quarter Details Back

- Then selected summary will be approved & it will automatically send to the CA Sri Lanka Training Division

Note

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

Certificate Under Regulation 29 (Online)

When you are approving 4th quarterly summary of each student ,it will automatically appear on a screen to give the approval for regulation under 29.

Regulation 29

[X]

I Certify that Mr. /Ms. << **Name of the Student**>> has successfully completed the Period of Practical Training with <<**No. of days completed**>> days from <<**Start Date**>> to << **End Date**>> as required for the <<**Selection Criteria**>>.

In my opinion the training acquired by him /her is adequate.

Accept Decline

- Select relevant certificate criteria from the list
- If the training is adequate Click “[Accept](#)”
- If the training is inadequate Click “[Decline](#)”

Training Level wise Certificate

Certificate	Training Level
Certificate in Accounting & Business	Certificate Level
Certified Business Accountant	Executive Level
Diploma in Accounting & Business	Strategic Level - Year I
Certified Senior Business Accountant	Business Level
Associate Membership	Strategic Level - Year II or Corporate Level
Practicing Certificate	Strategic Level - Year II or Corporate Level

If the trainee has not completed the minimum training requirement within the given training period, necessary steps should be taken to extend training period

If an extension is required for Executive Level

Select “Decline” tab and make a request as an email or a letter to extend the training agreement until the trainee complete the minimum training requirement. After the extension, trainees should re-submit the 4th quarterly summary including the records of the extended period for approval

If an extension is required for Business Level

Two options

- Select “Decline” tab and make a request as an email or a letter to extend the training agreement until the trainee complete the minimum training requirement. After the extension, trainees should re-submit the 4th quarterly summary along with the extended period for approval.
- The minimum training requirement of 440 days for the Business & Corporate level are allowed to cover within the two years. Therefore you may accept the certification under regulation 29 irrespective of the completion of minimum training requirement in business level adding a comment in the last quarterly summary on non-completion.

If an extension is required for Corporate Level

Select “Decline” tab and make a request as an email or a letter to extend the training agreement until the trainee complete the minimum training requirement. After the extension, trainees should re-submit the 4th quarterly summary along with the extended period for approval.

If trainee has not completed minimum requirement at the Business level, total requirement for both Business & Corporate levels should be considered.

How to accept Certificate under Regulation 29 when a student resign from the training organization before completing the record book (without submitting all 4 quarterly Summaries)

- Steps :**
- Click “All” tab & Select the relevant student from the list
 - Click “Accept Regulation Under 29”
 - Change the Record book ending date to the Resignation date
 - Select Relevant Certificate from the list & Click “Accept”

Quarter	Start Date	End Date		Submitted for Approval	Delegated User Allocated	Delegated User Recommended	Supervising Member Approved	Status History
Quarter 01	2015-03-16	2015-06-15	Weekly Summary Quarter Summary	Y	N	N/A	Y	History
Quarter 02	2015-06-16	2015-09-15	Weekly Summary Quarter Summary	Y	N	N/A	Y	History
Quarter 03	2015-09-16	2015-12-15	Weekly Summary Quarter Summary	N	N	N/A	N	History
Quarter 04	2015-12-16	2016-03-15	Weekly Summary Quarter Summary	N	N	N/A	N	History

Certificates under Regulation 27 & 29 (Manual)

It is not mandatory to keep a hard copy of this certificate as the certificate is generated through online record book system . However, if student want to apply for Certified Senior Business Accountant & but could not complete minimum training requirement within business level training period, you have to give the certifications under regulation 27 & 29 as hard copies after completing the requirements

specimen copies of “**Certificates under regulations**” are attached in the guideline as mentioned below .

Annexure I - for certificate/ executive Level

Annexure II - for Strategic Level 1st year/ Business Level

Annexure III - for Strategic Level 2nd year / Corporate Level

Steps to Change Correspondence Email Address

- Go to the CA Sri Lanka website & login to the member’s area in the top right hand corner

- Click on the link “[Update Information](#)”
- Update your email address & click on the link “[Update My Profile](#)”
- Then all emails will be sent to the updated email address

Outline of the 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 of the needs to provide an effective and timely service.
2. Understanding the business environment.
3. Manage the assignment in an appropriate and adaptable way.
4. Communicates the progress of the assignment to colleagues and clients.
5. Ability 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. Identify opportunities to improve efficiency on assignments.
8. Completes 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. Working with others.
7. Contributing to profit efficiency.
8. Impressing clients.
9. Project management.

Secretarial Practices

1. Practical Knowledge on companies Act requirements,
2. Practical Knowledge on different 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 from as may be pre- scribed by the Council. The Training record shall be a 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 who are 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 the Institute in relation to practical training and the registered student shall comply with such requirement.

Key organization categories as follows

- | | |
|---|---|
| A. Manufacturing / Processing | G. Hotels |
| B. Banking / Finance / Insurance / Leasing | H. International Trading |
| C. Travel | I. NPO / NGO |
| D. Agriculture | J. State Corporations & Statutory Boards |
| E. Services | K. Others |
| F. Local Trading | |

Delay in Submitting quarterly summaries

Quarterly summaries should submit to the training division within 30 days from the quarter ending date

Eg. If training commenced on 04th March 2012

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

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)

(Please refer Practical Training Guide for further details)

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 &	-	-	-	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 10 of this Guide.

CERTIFICATE UNDER REGULATION 27*(Applicable for Non Public Practice Organizations)*

The foregoing is a true record of training acquired by the registered student

Mr./Ms.....

.....in this Organization.

.....
Signature of Authorized Officer
of the Training Organization

Date

.....
Designation

CERTIFICATE UNDER REGULATION 29

I certify that Mr. / Ms.

.....has successfully

completed the period of Practical Training ofyear/s with days

from to as required for the Certificate in

Accounting & Business/ Certified Business Accountant.

In my opinion the training acquired by him/her is adequate.

Date

.....
Signature of the
Supervising Member

CERTIFICATE UNDER REGULATION 27*(Applicable for Non Public Practice Organizations)*

The foregoing is a true record of training acquired by the registered student
 Mr./Ms.....
in this Organization.

.....
 Signature of Authorized Officer
 of the Training Organization

Date

.....
 Designation

CERTIFICATE UNDER REGULATION 29

I certify that Mr. / Ms.
has successfully
 completed the period of Practical Training ofyear/s with days
 from to as required for the Diploma in
 Accounting & Business / Certified Senior Business Accountant. .

In my opinion the training acquired by him/her is adequate.

Date

.....
 Signature of the
 Supervising Member

CERTIFICATE UNDER REGULATION 27

Annexure III

(Applicable for Non Public Practice Organizations)

The foregoing is a true record of training acquired by the registered student

Mr./Ms.....

.....in this Organization.

.....
Signature of Authorized Officer
of the Training Organization

Date

.....
Designation

CERTIFICATE UNDER REGULATION 29

I certify that Mr. / Ms.

.....has successfully

completed the period of Practical Training ofyear/s with days

from to as required for the Associate
Membership. In my opinion the training acquired by him/her is adequate.

Date

.....
Signature of the
Supervising Member

CERTIFICATE ON ELIGIBILITY FOR CERTIFICATE TO PRACTICE

I certify that Mr. / Ms.

..... has successfully
completed the eligibility requirements for Certificate to Practice * as specified
in Practical Training Guide.

Date

.....
Signature of the
Supervising Member

* Eligibility Requirements for Certificate to Practice -

Please refer the "Certificate to practice" Section of the Practical Training Guide or user guideline