

Portfolio and reflective statement.

PROFORMA FOR APPRENTICES



Apprentice ACCA ID (required):

Please use the [guidance document](#) on the ACCA Technician Apprentice (Level 4) web page on the ACCA Global website as a basis for completing the following forms:

- Submission and declaration form
- Portfolio and reflective statement proforma.

First of all complete the information about you, your employer(s) and the practical experience supervisor(s) during your apprenticeship on the separate submission and declaration form that should be sent to ACCA with the completed Portfolio and Reflective Statement (PRS). You can find this [here](#).

Please ensure you include your apprentice ACCA ID on the PRS proforma. To ensure that your PRS proforma is anonymous for marking purposes, please do not include your name anywhere on the proforma. Complete the proforma with statements addressing both the description of each skill and behaviour in the following tables, referring to the competencies. You are also required to complete the reflective statement component. **REMEMBER THAT THIS WORK MUST BE ORIGINAL AND WRITTEN BY YOU INDEPENDENTLY.** There is a statement to sign on the submission and declaration form to confirm this.

SUPPLEMENTARY DOCUMENTS

Please do not include any document if there are any potential confidentiality issues involved.

- Only include supplementary attachments as evidence where they are specifically referred to in the PRS itself.
- Please also make sure that supplementary documents submitted do not identify yourself or your employer.
- Any attached material not clearly cross-referenced to competencies and challenge questions in the PRS itself will not be opened or considered by the Independent Assessors when reviewing your PRS.
- Supporting evidence should comply with your employer's rules on confidentiality and ACCA's Code of Ethics and Conduct.
- We suggest a maximum of five documents and you should be mindful of the restrictions on size and format of any supporting evidence.
- If you chose to provide further supporting evidence as attachments please ensure these are not password protected and are in a common file format such as MS Word or PDF.
- The supporting documents should not be more than 10MB in total and they must not be ZIP files or other compressed formats.
- Files that cannot be accessed will not be considered as part of your submission.

When completed you must then submit this document and the submission and declaration form by raising a case in the help and support section of your [MyACCA portal](#).

Skills

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
Skills	Analysis	<i>Create and interpret information and show how that information can be used most effectively to add value to the organisation.</i>	A	Process and interpret information in a way that can be understood by management to make effective decisions.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Demonstrate how information can be used to add value to an organisation's activities.					
	Communication	<i>Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats.</i>	A	Explain the various ways in which accountants communicate.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Decide which forms of communication to use in different circumstances.					
			C	Communicate effectively with colleagues, managers and at meetings, whether that be verbally or in writing.					
			D	Prepare and give effective presentations.					

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
	Leadership	<i>Proactively manage their own development and is committed to the job and their profession.</i>	A	Act proactively in work situations by identifying problems and suggesting solutions.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Demonstrate the ability to formulate personal development plans and identify training needs.					
			C	Monitor developments in the accountancy profession which can affect working practice and conduct.					
	Planning and prioritisation	<i>Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time and co-ordinate the input of others in order to meet both deadlines and changing priorities.</i>	A	Plan work effectively to meet objectives set.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Monitor performance against your and others' expectations.					
			C	Effectively prioritise your work using the importance/urgency criteria and adapt flexibly to changing priorities.					

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
	Produces quality and accurate information	<i>Apply accounting/ tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion.</i>	A	Ensure work produced meets minimum standards of quality and complies with law and regulation.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Make sure your work is accurate, errorfree and delivered on time.					
	Team working and collaboration	<i>Work effectively in a team and with others, maintaining effective, professional working relationships both internally and externally across organisations.</i>	A	Work effectively with others to achieve team and personal objectives.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Maintain and create effective and professional working relationships.					
			C	Act credibly and professionally in relations with immediate colleagues, across departments and external stakeholders.					

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
	Uses systems and processes	<i>Understand the systems and processes of the organisation sufficiently, as applicable to the role. Proficient in the IT systems applicable to the role.</i>	A	Use accounting and control systems as applicable to the role and function.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Effectively use IT software relevant to the role to improve communication, analysis and to aid decision-making.					

Behaviours

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
Behaviours	Adaptability	<i>Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment.</i>	A	Listen effectively.		Yes	Yes	Yes	
			B	Use sensitivity in assessing the needs and views of others.		No	No	No	
			C	Demonstrate flexibility and discretion where appropriate.		Deferred	Deferred	Deferred	
			D	Adapt behaviour appropriately to the circumstances and the stakeholder.					
	Adding value	<i>Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strive to improve own working processes and those of the organisation.</i>	A	Engage with stakeholders across the organisation, improving understanding and cooperation.		Yes	Yes	Yes	
			B	Support and contribute to decisions, which improve effectiveness and efficiency and create value.		No	No	No	
			C	Monitor and review procedures and processes, promoting continuous improvement – both in your department and across the wider business.		Deferred	Deferred	Deferred	

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
	Ethics and integrity	<i>Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession.</i>	A	Behave honestly and with integrity.		Yes	Yes	Yes	
			B	Demonstrate fundamental ethical principles in the professional environment.		No	No	No	
			C	Respect others even when you experience conflict or when in disagreement with others.		Deferred	Deferred	Deferred	
	Proactivity	<i>Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure.</i>	A	Take responsibility for your actions and for your areas of responsibility and objectives.		Yes	Yes	Yes	
			B	Demonstrate drive, energy and a positive, cooperative attitude.		No	No	No	
			C	Act resiliently to pressure and changing demands.		Deferred	Deferred	Deferred	

Area (grouping)	Objective (title)	Description		Elements (competence)	Statement (100–300 words)	1st assessor outcome	2nd assessor outcome	Moderator outcome	Feedback if deemed non-competent
	Professional scepticism	<i>Demonstrates an attitude that includes a questioning mind, being alert to conditions which may indicate possible misstatement of financial information due to error or fraud.</i>	A	Be vigilant and exercise due diligence in all aspects of work.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
			B	Challenge and question information and assertions, where justified.					
			C	Recognise signals which may indicate a risk of fraud or error.					

Reflective statement assessment form

Background statement	Your background statement should be a minimum of 300 words with the maximum limit of 400 words	1st assessor outcome	2nd assessor outcome	Moderator	Feedback if deemed non-competent
Describe your organisation and its business model, explaining what your department does to support the aims of the organisation and summarising your own job description and role within the organisation.		Yes No Deferred	Yes No Deferred	Yes No Deferred	

Challenge questions	Answer each of the 3 challenge questions below with a minimum word limit of 500 and a maximum limit of 600	1st assessor outcome	2nd assessor outcome	Moderator	Feedback if deemed non-competent
Question 1 Describe the benefits of acquiring knowledge assessed in the on-programme assessments and how they apply to your role and identify which were most or least relevant, explaining why.		Yes No Deferred	Yes No Deferred	Yes No Deferred	

Challenge questions	Answer each of the 3 challenge questions below with a minimum word limit of 500 and a maximum limit of 600	1st assessor outcome	2nd assessor outcome	Moderator	Feedback if deemed non-competent
Question 2 Discuss the skills from the Portfolio and how these are useful in you becoming more effective at work and identify which will most help you develop your potential in the future explaining why.		Yes No Deferred	Yes No Deferred	Yes No Deferred	
Question 3 Explain which of the behaviours you have demonstrated are most important for you personally and professionally, for the organisation you work for and in the wider interests of stakeholders, including the public interest.		Yes No Deferred	Yes No Deferred	Yes No Deferred	

The maximum word count of the entire reflective statement should be no more than 2,200 words.

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THINK AHEAD