

ACCA Level 4 Professional Accounting Technician apprenticeship (Version 2.0)

Portfolio submission form

Apprentice ACCA ID

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Background information

What type of organisation do you work for?

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What department do you work in and what does it do?

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What is your job description and role within the organisation?

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Evidence

This portfolio consist of three sections. Each section relates to the three assessment outcomes listed below.

- Section 1 – Assessment outcome AO3: Business insight and communication
- Section 2 – Assessment outcome AO4: Digital and data competence
- Section 3 – Assessment outcome AO5: Quality improvement, work management, and sustainability.

A full description of each assessment outcome is below:

AO3: Business insight and communication

Uses accounting information to develop business insights and communicates them clearly through appropriate media, while building and maintaining effective, collaborative relationships and demonstrating awareness of how equality, diversity, and inclusion influence professional interactions and the delivery of accountancy services.

AO4: Digital and data competence

Uses accounting software and data analysis techniques in accordance with data and cyber security requirements, handling financial data securely and responsibly while demonstrating awareness of data protection obligations, cyber risks, and safe digital working practices.

AO5: Quality improvement, work management, and sustainability

Supports quality improvement initiatives and applies workload management principles to deliver accounting services effectively and efficiently, while considering climate, environmental, and sustainability challenges in accounting practice.

You should refer to the *ACCA Guide to Completing the Portfolio* before you complete your portfolio. This contains important information relating to portfolio evidence, submission and marking.

SECTION 1 – Assessment outcome AO3: Business insight and communication

This section requires you to submit three pieces of evidence.

These cover the following knowledge and skills:

- 1 Evidence piece 1: K3
- 2 Evidence piece 2: K11 **OR** S10 **OR** S11
- 3 Evidence piece 3: S9

1 Evidence for K3

K3: The wider financial and accounting professional landscape including the role of accountancy, the requirement to stay abreast of changes in accounting technology and practice and awareness of the role of regulators and professional bodies.

(Performance category: Regulatory and procedural awareness)

Evidence piece 1: This file evidences my competence against K3:

In the box below, describe how your evidence demonstrates your competence:

2 Evidence for K11 or S10 or S11

K11: The impact of equality, diversity and inclusion on service delivery within accountancy, for example enhancing organisational reputation with customers, investors, and staff, improving business performance, and growth.

S10: Communicate accounting information through a variety of media to enable key stakeholders to understand what is required, considering the risks and benefits to the organisation of social media and other digital applications.

S11: Build and maintain collaborative, professional relationships with internal and external stakeholders to deliver accounting tasks, recognising the importance of equality, diversity and inclusion.

(Performance category: Communication and collaboration)

Evidence piece 2: This file evidences my competence against ☐ K11, or ☐ S10, or ☐ S11:

In the box below, describe how your evidence demonstrates your competence:

3 Evidence for S9

S9: Use accounting information to add value to the organisation through use of data visualisations, analysis and interpretation, and communicate financial information in a way that facilitates understanding for non-finance stakeholders.

(Performance category: Information use and decision making)

Evidence piece 3: This file evidences my competence against S9:

In the box below, describe how your evidence demonstrates your competence:

SECTION 2 – Assessment outcome AO4: Digital and data competence

This section requires you to submit one piece of evidence.

This covers the following knowledge and skills:

1 Evidence piece 1: K9 and S6

1 Evidence for K9 and S6

K9: Principles of data analysis, data security and cyber security to support collation, analysis and compliant handling of data and working safely online in an accounting context.

S6: Use software packages to assist with accounting tasks in line with cyber and data security requirements, using data securely and safely, including backing up data.

(Performance category: Regulatory and procedural awareness)

Evidence piece 1: This file evidences my competence against K9 and S6:

In the box below, describe how your evidence demonstrates your competence:

SECTION 3 – Assessment outcome AO5: Quality improvement, work management, and sustainability

This section requires you to submit two pieces of evidence.

These cover the following knowledge and skills:

- 1 Evidence piece 1: K10 **OR** S5
- 2 Evidence piece 2: S8

1 Evidence for K10 or S5:

K10: The nature and importance of key climate, environmental and emerging sustainability challenges and their impact on service delivery in accountancy, such as sustainable business practices, risk, government regulation, and the benefits of economic sustainability for stakeholders.

S5: Participate in or support others with quality improvement activities, for example the improvement of personal working practices.

(Performance category: Applied skills)

Evidence piece 1: This file evidences my competence against ☐ K10, or ☐ S5:

In the box below, describe how your evidence demonstrates your competence:

2 Evidence for S8:

S8: Use workload management principles to plan, organise and prioritise own tasks, and manage time effectively.

(Performance category: Responsibility and autonomy)

Evidence piece 2: This file evidences my competence against S8:

In the box below, describe how your evidence demonstrates your competence: