

Approved Employer PER summary form



For trainees employed by an Approved Employer – trainee development stream, Platinum or Gold level

When leaving an ACCA Approved Employer – trainee development stream at Gold or Platinum level, you must ensure this form is completed. Some sections must be completed by your workplace mentor. The form must be retained in case it is requested by ACCA for practical experience requirement (PER) audit purposes or to validate any claims on your membership application.

The workplace mentor:

- should ideally be a qualified accountant recognised by law in your country and/or a member of an IFAC body, and
- must have knowledge of your work.

If your workplace mentor is not qualified this form should be signed by a training supervisor who is qualified.

YOUR DETAILS

Full name

ACCA student/affiliate number

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YOUR EMPLOYER'S DETAILS

To be completed by the trainee

Employer name

Approved registration number (if applicable/known)

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Level of approval (Gold/Platinum)

Your start date

D	D	M	M	Y	Y	Y	Y
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Your end date

D	D	M	M	Y	Y	Y	Y
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Your job title

Employer address

Postcode

Email address

Web address

WORKPLACE MENTOR DETAILS*

To be completed by your workplace mentor

Full name

ACCA membership number (if applicable)

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Job title

Contact address

Postcode

Email address

Telephone number (incl country code)

Are you a qualified accountant recognised by law in your country?

Yes

No

Which professional bodies are you a member of?

Does the trainee report to you?

Yes

No

* Note to the trainee: If you have had more than one workplace mentor, please photocopy this page as necessary.

PERFORMANCE OBJECTIVES SUMMARY

To be completed by the workplace mentor

From your review of the performance objective statements, sign against those performance objectives you consider the trainee has achieved while under your supervision and employed with your organisation. Guidance on this can be found in the ACCA performance objective booklet.

PERFORMANCE OBJECTIVE

WORKPLACE MENTOR'S SIGNATURE

DATE

Enter your signature against each performance objective that has been achieved

(DD/MM/YYYY)

Essentials

1 Demonstrate the application of professional ethics, values and judgement

2 Contribute to the effective governance of an organisation

3 Raise awareness of non-financial risk

4 Manage self

5 Communicate effectively

6 Use information and communications technology

7 Manage ongoing activities in your area of responsibility

8 Improve departmental performance

9 Manage an assignment

Options

10 Prepare financial statements for external purposes

11 Interpret financial transactions and financial statements

12 Prepare financial information for management

13 Contribute to budget planning and production

14 Manage and control budgets

15 Evaluate potential business/investment opportunities and the required finance options

16 Manage cash using active management and treasury systems

17 Prepare for and collect evidence for audit

18 Evaluate and report on audit

19 Evaluate and compute taxes payable

20 Assist with tax planning

Please complete and return to:

Operational Delivery Members Lifecycle

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