



# *Six-monthly review checklist*

## *A guide for employers*

This checklist has been designed for everyone involved in ACA training, including the qualified person responsible for training (QPRT), person responsible for training (PRT), authorised training principals (ATP) and counsellors.

During an ACA student training agreement, it is a mandatory requirement that all areas of the ACA qualification and the online training file are completed by your students and reviewed by you every six months. The first review can take place up to eight months following your student's start date to accommodate existing appraisal cycles.

### TOP TIPS

- Practical work experience days must be entered in six-monthly blocks.
- Professional development skills must progress in line with your students' actual development at work.
- Ethics must be covered with your students every six months and include a discussion of an ICAEW Ethics scenario as well as a real-life situation. These discussions should continue even when the student has completed the Ethics Learning Programme and achieved 70% or more in the assessment. All discussions should be confirmed in the Ethics section of the online training file.
- Students registering after 1 July 2020 will access the new Ethics Learning Programme from their training file. These students should study the online modules and complete the final assessment within the first 12 months of their agreement.
- Students who joined before 1 July 2020 will continue with the original Ethics Learning Programme and must complete the modules and assessment by the end of 2021. **Please note that this older version of the Ethics Learning Programme will not be available after 31 December 2021.**

## PROGRESS TRACKER

During the six-monthly review, complete the table below to track your student's progress.

Student name:		Review date:				Next review date:					
Practical work experience days:		Professional development ladders:		Ethics Learning Programme modules:		Ethics in Practice scenarios		Ethics assessment score:		Exam progress:	
	/450		/52		/6		/18		%		/15

## REVIEW CHECKLIST

### Practical work experience

- Has the student entered their practical work experience days for the six-month period?
- Do the days correlate to their timesheet or other records?

### Professional development

- Has the student documented a sufficient number of professional development skills?
- Does their progress in professional development skills adequately reflect their actual development in the workplace?
- Are the professional development skills evidenced using a specific example, using structured sentences? Examples should always describe the situation, the action by the student (what and how), and the positive outcome.
- Have they added your feedback within their training file using sufficient detail?
- If they are due to attempt the Case Study exam within the next six months, have they completed all professional development skills relating to this exam?

**Please note** that if your organisation's internal professional development programme is accredited by ICAEW, your students will not see a professional development tab within their training file. They must still keep an honest and accurate record of their professional development throughout their ACA training, using your organisation's professional development programme, and you should discuss their professional development progress at every six-monthly review.

### Ethics and professional scepticism

- Has the student worked through new modules of the ICAEW Ethics Learning Programme?
- Have they brought notes on some of the ethics in practice scenarios to discuss with you?
- Have they added an ethics review to their training file to document their progress?
- If they are due to attempt the Case Study exam within the next six months, have they completed the ethics assessment?

### **Audit qualification (if applicable)**

- If they have performed audit work during the last six-month period, have they added the days to their training file in a six-month block?
- Is the audit work appropriately categorised between 'statutory' and 'other'?
- Have they adequately described the size and type of entity, and the audit work they performed?
- Have you added feedback directly to their training file? (please note that access is restricted to individuals holding the Audit Qualification).

### **Further guidance**

If you have a question, please contact your [local training and business development manager](#) or contact our student support team, call +44 (0)1908 248 250 or email [studentsupport@icaew.com](mailto:studentsupport@icaew.com).

If you are no longer involved with training ACA or ICAEW apprenticeship students, your role has changed or you would like to update your contact details, please email our training team on [ATEaccess@icaew.com](mailto:ATEaccess@icaew.com).

View your students' progress and access their online training file at [icaew.com/trainingfile](https://icaew.com/trainingfile).

For guidance on how to review your students' online training file, [watch the online training file guidance video](#).