



Hong Kong Institute of  
**Certified Public Accountants**  
香港會計師公會



# **Qualification Programme (QP)**

## **Practical Experience Online System (Online Training Records for Authorized Supervisor)**

### **User Guide**

# Online Training Records for Authorized Supervisor

## User Guide

This user guide shows how the Authorized Supervisor (AS) complete the following tasks via the online system.

### When to access

- (1) **Review and sign off of Training Records** submitted by the QP students (refer to P.2 for details)
- (2) **Review and approve the Final Sign Off request of Training Records** submitted by the QP students (refer to P.6 for details)


### How to know QP students submit the Training Records

You will receive an email notification once your QP students submitted the Training Records for your review and annual sign off. Please review and sign off on the Training Records at least on an annual basis.

### How to know QP students submit the Final Sign-Off request

At the beginning of each month, you will receive an email notification which indicates the total number of Final Sign-Off request(s) pending for your approval.

*Email sample:*



Hong Kong Institute of  
Certified Public Accountants  
香港會計師公會

Dear Ms [REDACTED],

AS Number: AS0 [REDACTED]  
Name of Employing Organization: [REDACTED]

Our system shows the following items pending for your action. Please click this [link](#) to take any necessary action(s):

I. Documents submitted by QP students	
a. Development Commitment	Pending for your approval: 2
b. Training Records	Pending for your final sign off: 1
II. Annual Monitoring requested by HKICPA	Pending for your completion: 0
III. Outgoing QP student(s)	
Nil	

Should you have any questions regarding the above, please contact the Practical Experience Team by email to [pef@hkicpa.org.hk](mailto:pef@hkicpa.org.hk).

Yours sincerely,

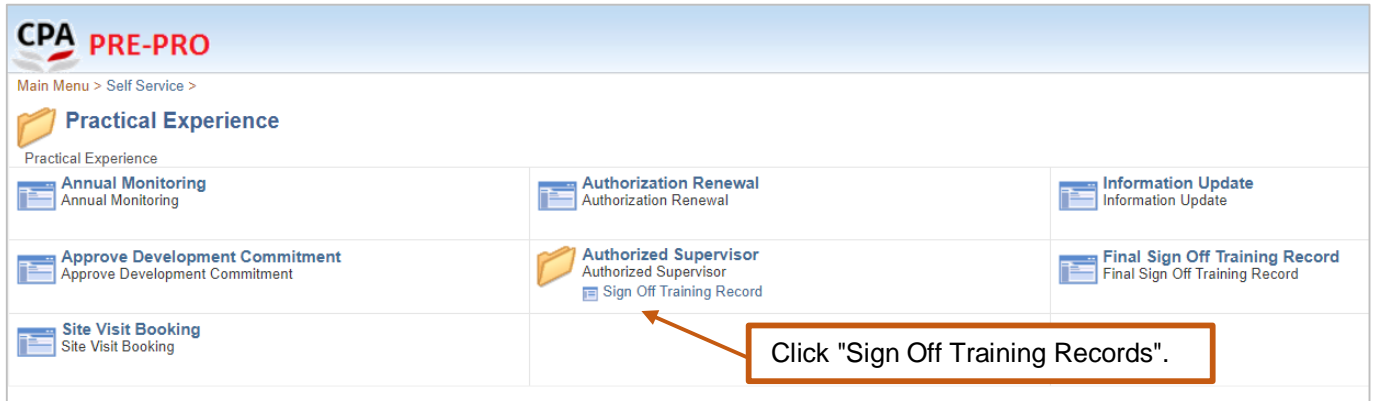
Practical Experience Team  
Education and Training  
Hong Kong Institute of Certified Public Accountants

CPA: *The Success Ingredient*

## Where to access

You can login the [Practical Experience Online System](#) and access to the Landing page.

*Illustrative example:*



After login, please follow the steps below to review and sign off of Training Records.

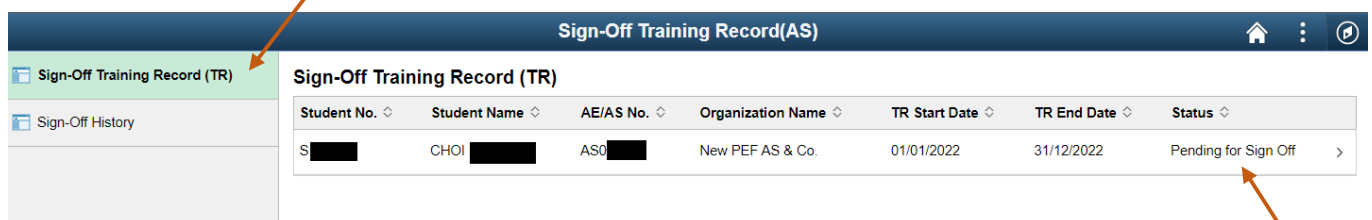
## (1) How to review and sign off of Training Records

**Note:** You can click the information icon to view reminder notes under different sections.

Please follow the steps below to complete the review and sign off of online Training Records.

**Step 1:** Find the Training Records pending for sign off

(1) Click "Sign-Off Training Record (TR)" tab.



(2) Click the record to open the Training Records.  
**Note:** You can view all the submitted Training Records (pending for sign off) under this grid table.

**Step 2: Review the Training Records**

The screenshot shows a web form titled "TRAINING RECORDS DETAILS". On the left is a vertical navigation menu with the following items, each with a radio button:

- TRAINING RECORDS DETAILS** (radio button is selected, labeled "Visited")
- INTERIM REVIEW** (radio button is "Not Started")
- TECHNICAL COMPETENCES** (radio button is "Not Started")
- ENABLING COMPETENCES** (radio button is "Not Started")
- REFLECTIVE STATEMENT** (radio button is "Not Started")
- ANNUAL SIGN-OFF** (radio button is "Not Started")

The main content area on the right is titled "TRAINING RECORDS DETAILS" and contains the following information:

**Note:** Please click the "Save" button before moving to the next section.

Student No. S [REDACTED]  
Student Name CHOI [REDACTED]  
AE/AS No. AS [REDACTED]  
Organization Name New PEF AS & Co.  
Start Date 01/01/2022  
End Date 31/12/2022  
Counselor/ AS Name MAK [REDACTED]  
AE/ AS Remarks  
Status Pending for Sign Off

An orange callout box with a border and an arrow pointing to the navigation menu contains the text: "Review each section of the Training Records."

**Step 3: Approve/ Push Back the Training Records**

**ANNUAL SIGN-OFF** **Save**

**QP Student Comment**

For your review please.

**Counselor/AS Comment (Optional)**

**Sign Off** **Push Back**

Click "Save" button to save your comments (if any).

**Push Back the Training Records**

If push back the Training Records to the QP student for revision:

- (1) Input comments for your QP student's reference (if any), and
- (2) Click "Push Back" button to route the Training Records to the QP student for amendment.

Note: AS is not able to edit the content of the Training Records.

**Approve the Training Records**  
(1) Click "Sign Off " button.

**Confirmation** **Confirm**

I confirm that the selected QP student was under my supervision for the period as stated;

In my opinion, the selected QP student has recorded the type and duration of practical experience competences acquired and has given self-reflective feedback on the "Reflective Statement" section; and

I declare that, to the best of my knowledge and belief, the information provided in the Training Records is true and correct as at this date of confirmation.

**Cancel**

(2) Check the box to make declaration.

(3) Click "Confirm" button to sign off the Training Records.

**Details of Counselor/AS**

Name of Counselor/AS	MAK	██████████
Job Position	Finance Manager	
HKICPA Membership No.	A	██████████
Professional Accountancy Body		
Membership/License No.		
Approval Date	13/12/2022	

Details of the person who sign off the Training Records will show here.

Once you sign off, the related Training Records will automatically update to "Sign-Off History".

Student No.	Student Name	AE/AS No.	Organization Name	TR Start Date	TR End Date	Status	Annual Sign Off Date
S [redacted]	CHOI [redacted]	AS [redacted]	New PEF AS & Co.	01/01/2022	31/12/2022	Signed Off	13/12/2022

**Note:**

1. After you sign off the Training Records, the QP student will receive a confirmation email and the Training Records status will change to **"Signed Off"**.
2. When you push back the Training Records, the QP student will receive an email notification and the Training Records status will change to **"Push Back"**.
3. You can go to the "Sign-Off History" tab to view the signed Training Records when necessary.

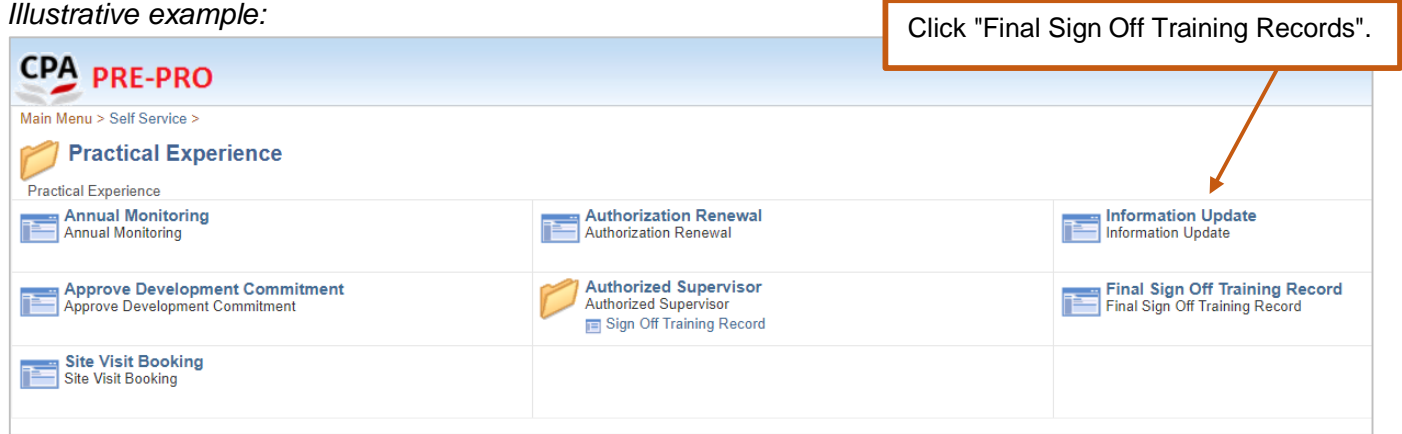
**END**

**(Training Records - Annual sign off)**

**(2) How to approve the Final Sign-Off request**

**Where to access**

Illustrative example:



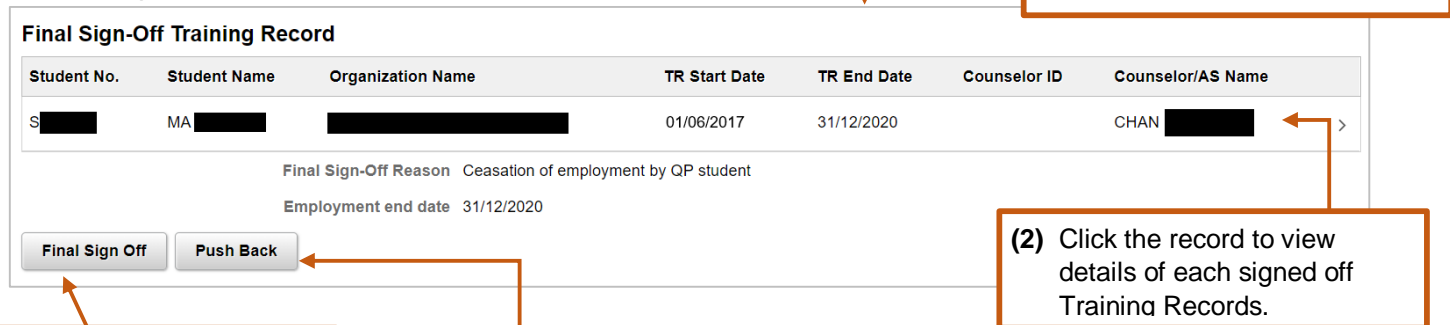
After login, please follow the steps below to approve the Final Sign-Off request.

**Option 1:** To confirm/ push back the Final Sign-Off request one by one.

Illustrative example:



Record expanded view:



**(3a) Approve**  
Click "Final Sign Off" button.

**(3b) Push Back**  
Click "Push Back" button to route the Final Sign Off request to the QP student for revision.

**Option 2: To confirm/ push back the Final Sign-Off request by batch.**

**(1) Check the boxes to select the records.**

Final Sign-Off Training Record

Final Sign-Off Training Records and Development Commitment (DC) Termination

Select all records

Student No.	Student Name	Organization Name	Department	AE/AS Remarks	Commencement Date of Employment	DC Effective Date	DC End Date	End Date of Employment	DC Status	Final Sign-Off Reason	Final Sign-Off Status
<input type="checkbox"/>	S [REDACTED] MA [REDACTED]	[REDACTED]	Finance & Accounting Department	[REDACTED]	01/06/2017	01/06/2017	31/12/2020	31/12/2020	In Effect	Ceasation of employment by QP student	Pending for Final Sign Off

Select particular records

Final Sign Off Push Back Print

**Summary list of pending Final Sign-Off request**  
 Before approval, you can click "Print" button to export the **full list of Final Sign-Off requests** as shown in the above grid table for validation.

**(2a) Approve**  
 Click "Final Sign Off" button to approve by batch.

**(2b) Push Back**  
 Click "Push Back" button to route the Final Sign-Off request to QP students for revision by batch.

Cancel **Confirmation**

I confirm that the selected student(s) has/ have acquired the relevant practical experience competences for the period as stated in which the selected student(s) has/ have been employed by the AE/ AS employing organization (or its subsidiary/ affiliate as approved under group registration).

I declare that, to the best of my knowledge and belief, the information provided in the Training Records is true and correct as at this date of confirmation.

**(3) Check the boxes to make declaration.**

**Confirm** **(4) Click "Confirm" button.**

▼ **Approver's Details**

Name of Approver CHAN [REDACTED]

Job Position Senior Accounting Manager

HKICPA Membership No. A [REDACTED]

Professional Accountancy Body -

Membership/License No. -

Approval Date 13/12/2020

Details of the person who approve the requests will show here.



Once you approve, the final signed off Training Records will automatically move to "Final Sign-Off History".

Click "Final Sign-Off History" tab.

Illustrative example:

Student No. ◇	Student Name ◇	AE/AS No. ◇	Organization Name ◇	Department ◇	AE/AS Remarks ◇	Commencement Date of Employment ◇
S [REDACTED]	MA [REDACTED]	AS [REDACTED]	[REDACTED]	Finance & Accounting Department	[REDACTED]	01/06/2017

DC Effective Date ◇	DC End Date ◇	End Date of Employment ◇	Final Sign Off Reason ◇	Approver ◇	Approval Date ◇
01/06/2017	31/12/2020	31/12/2020	Ceasation of employment by QP student	CHAN [REDACTED]	13/12/2020

Approved details.

**Note:**

1. After you complete the final sign-off request(s), the QP student(s) will receive a confirmation email.
2. When you push back the request(s), the QP student(s) will receive an email notification and the Final Sign-Off status will change to "Push Back".
3. You can go to "Final Sign-Off History" tab to review the final signed off Training Records when necessary.

**Enquiry**

Please send email to [pef-enquiry@hkicpa.org.hk](mailto:pef-enquiry@hkicpa.org.hk).

**END**

**(Training Records – Final Sign-Off)**