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 discussed with your students every six months, even when they have completed the ICAEW Ethics Learning Programme, viewed all Practising Ethics webinars (five webinars containing 18 scenarios) and achieved more than 70% at the devolved assessment. Each discussion must be evidenced within the online training file.
- The ethics devolved assessment should not be attempted until the full Ethics Learning Programme has been completed and several ethical discussions have taken place during six monthly reviews and recorded within your students online training file.

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:	Practicing Ethics webinar 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 one or two new modules of the ICAEW Ethics Learning Programme?
- [ ] Have they brought notes on some of the ethics scenarios from the ICAEW Practising Ethics webinars 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 devolved assessment?

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

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.

View your students' progress and access their online training file at icaew.com/trainingfile.

For guidance on how to review your students' online training file, watch the online training file guidance video.