**UNITED REPUBLIC OF TANZANIA**

# NATIONAL BOARD OF ACCOUNTANTS AND AUDITORS TANZANIA (NBAA)

# MEMBERS AND EXAMINATIONS MANAGEMENT SYSTEM (MEMS)

User Manual (Version 1.0.0)

# Table of Contents


1 INTRODUCTION ..... 4
2 GETTING STARTED ..... 4
2.1 Accessing the Platform ..... 4
2.2 Dashboard Overview ..... 4
2.2.1 Navigation Menu “A” ..... 6
3 Bills - Payments ..... 7
3.1 My Proformas ..... 8
3.2 Generating a New Invoice ..... 9
3.3 Managing Subscription Fee Bills ..... 11
3.4 "My Receipt" Section ..... 12
4 REGISTRATION ..... 14
4.1 "Personal Details" Section ..... 14
4.1.1 Editing Personal Details ..... 16
4.1.2 "My Referees" Section ..... 18
4.1.3 Adding a Referee ..... 19
4.2 Academic Qualification Section ..... 21
4.2.1 Adding Academic Qualifications ..... 23
4.3 Accounting Professional Qualification Section ..... 25
4.3.1 Adding an Accounting Professional Qualification ..... 27
4.4 Managing "My Work History" ..... 29
4.4.1 Adding Work Experience ..... 31
5 PRACTICAL EXPERIENCE ..... 33
5.1 "Placement" Under Practical Experience ..... 33
5.1.1 Adding an Employer ..... 35
5.1.2 Adding a Mentor ..... 37
5.2 Managing "Logbook List" ..... 38
5.2.1 Logbook Activities ..... 40
5.3 Mentorship List ..... 43
5.3.1 New Mentorship Requests List ..... 44
5.3.2 User Manual Script for Logbooks Needing Review ..... 46
6 CPD ..... 47
6.1 Accessing CPD Requests ..... 47

6.1.1 Requesting CPD Hours ..... 49
6.1.2 CPD Hours Assignments ..... 51
6.1.3 Candidacy Registration List ..... 52
7 CPA Candidacy Registration ..... 54
7.1 Candidacy Upgrade Application ..... 56
7.1.1 IPSAS Application ..... 58
7.2 My Examination Applications List ..... 60
7.3 Exam Application ..... 61
7.4 Postponed Exam List ..... 62
7.5 Examination Appeal Applications List ..... 64
7.6 Membership Application List ..... 65
7.7 Membership Application ..... 67
7.7.1 Membership Retirement Application ..... 68
7.8 Transcript Application ..... 70
8 Change Request Application ..... 71
9 Viewing Member Certificates ..... 73
9.1 Certificate Application Submission ..... 74
10 Tuition Providers List ..... 76
11 Examination Timetable ..... 78
12 Navigating and Using the 'Events' Section ..... 80
12.1 Accessing and Reviewing 'Events Attended' Section ..... 81
12.2 Managing and Reviewing 'Applied Events' ..... 83
12.3 Event Details Review and Application Process ..... 84
13 Question Bank List ..... 85
14 Examination Session History Feature ..... 86

# 1 INTRODUCTION

Welcome to Members and Examinations Management System (MEMS) user manual. This document provides instructions and guidelines to help you navigate and utilize our platform effectively for your educational and professional development needs.

# 2 GETTING STARTED

## 2.1 Accessing the Platform

- Describe how users can log in to the platform.
- Dashboard

## 2.2 Dashboard Overview

The dashboard is your home base and provides a quick snapshot of outstanding items and upcoming events.

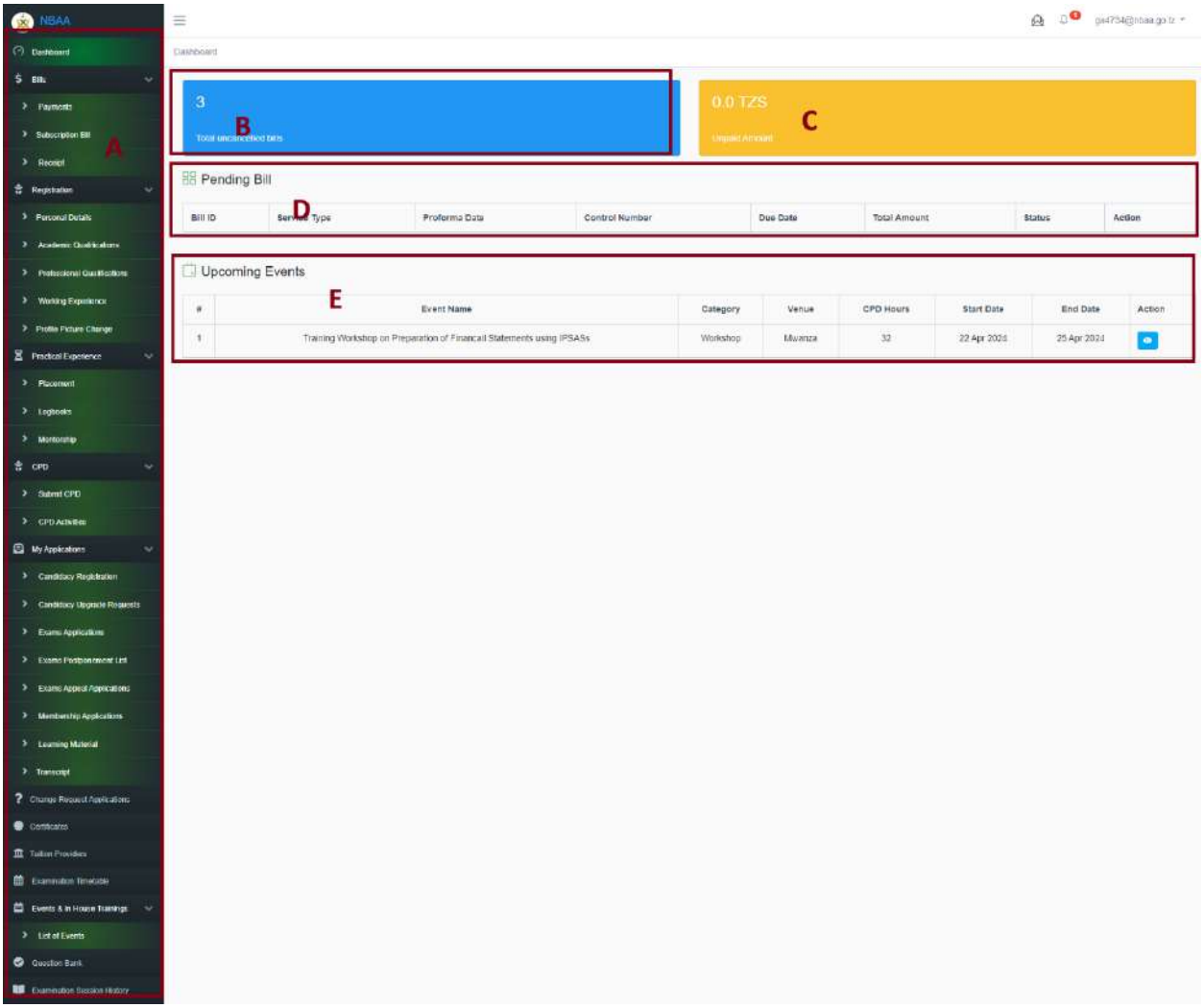



*Figure 1 User Dashboard*

Bills Section

- **Total Uncancelled Bills**: Indicates the number of bills you have yet to settle, as indicated under section **"B".**
- **Pending Bill**: Here you can view details of your pending bills as indicated under section **"D",** including:
    - **Bill ID**: Unique identifier for each bill.
    - **Service Type**: The type of service the bill corresponds to.
    - **Proforma Date**: The date the bill was issued.
    - **Control Number**: A number used for payment processing.
    - **Due Date**: The deadline by which the bill should be paid.
    - **Total Amount**: The full amount to be paid.

- **Status**: Current status of the bill (e.g., unpaid, pending).
- **Action**: Actions that can be taken on the bill (e.g., view, pay).

Upcoming Events **"E"**

- **Event Name**: Name of the event you might be interested in.
- **Category**: The category to which the event belongs (e.g., Workshop).
- **Venue**: Location where the event will be held.
- **CPD Hours**: Continuing Professional Development hours available from the event.
- **Start Date**: The date when the event begins.
- **End Date**: The date when the event concludes.
- **Action**: Any actions you can take, such as registering for the event.

### 2.2.1 Navigation Menu "A"

On the left side of the screen is the main navigation menu, which allows you to access different sections of the system.

- **Dashboard**: Returns you to the main landing page.
- **Bills**: Manage and view your bills and payments.
    - **Payments:** Details about payment you have made
    - **Subscription Bill**: View your subscription bills.
    - **Receipt**: Access receipts for payments made.
- **Registration**: Register for events and courses.
    - **Personal Details**: Update or edit your personal information.
    - **Academic Qualifications**: Add or edit your academic qualifications.
    - **Professional Qualifications**: Manage your professional qualifications.
    - **Work Experience**: Document your work history.
    - **Profile Picture Change**: Access your Profile picture change requests.
- **Practical Experience**: Record and submit your practical experience.
    - **Placement:** Manage your Employment and Mentorship History.
    - **Logbooks**: Manage your logbooks.
    - **Membership**: Access membership options and information.

- **CPD**: Continuing Professional Development activities.
- **Submit CPD:** Manage activity requests for CPD Hours.
- **CPD Activities:** Manage CPD Hours activities granted and required.
- **My Applications**: Manage your applications.
- **Learning Material**: Access educational resources.
- **Transcript**: Request and view your transcripts.
- **Certificates**: View and manage your certificates.
- **Tuition Providers**: Find approved tuition providers.
- **Examination Timetable**: View upcoming examination schedules.
- **Events & In-house Training**: Access the calendar of events and training.

**General Tips**

- Use the navigation menu to easily switch between different sections.
- Keep an eye on the dashboard for any pending bills or upcoming events.
- Regularly update your personal and professional details to ensure your records are current.
- Utilize the Learning Material and CPD sections to aid in your professional development.
- For assistance, use the help feature or contact customer support.

# 3 Bills - Payments

**Accessing My Bills**

To view and manage your bills within the NBAA system, select the "Bills" tab then “Payments” from the main dashboard. This will take you to the "My Bills" page, which provides a detailed list of your financial interactions with NBAA.

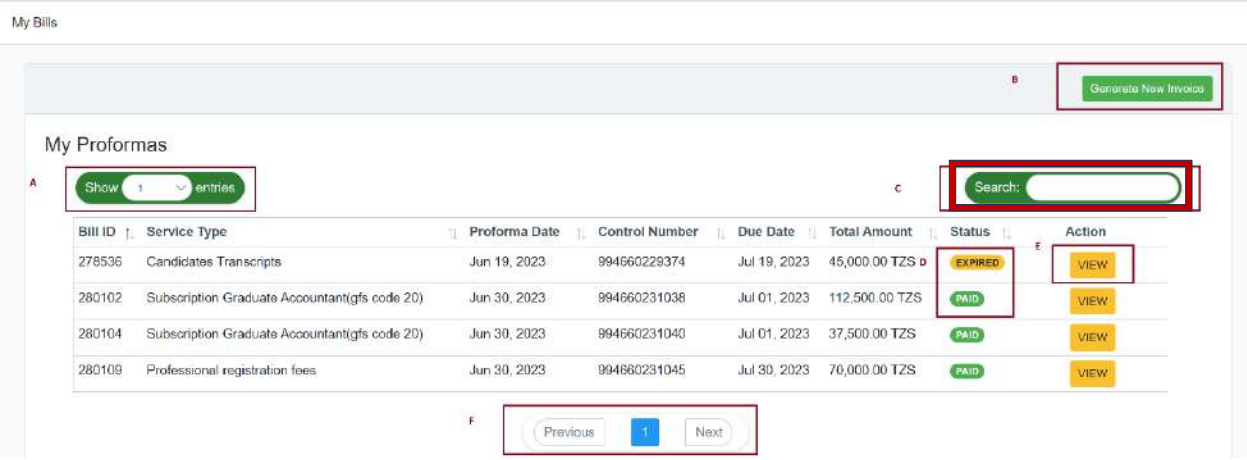



*Figure 2 My Proformas*

## 3.1 My Proformas

At the top of the "My Bills" page, you will find the "My Proformas" section.

**Viewing Proforma Invoices**

- **Show Entries**: Use the drop-down menu to select the number of entries you wish to view at one time on the page.
- **Search**: Use the search bar **"C"** to quickly find specific bills by any keyword such as Bill ID, Service Type, etc.

**Proforma Invoice List**

The main table displays your proforma invoices with the following columns:

- **Bill ID**: The unique identifier for each bill.
- **Service Type**: Describes the service for which the bill has been issued.
- **Proforma Date**: The date when the proforma invoice was created.
- **Control Number**: A unique number used to track the payment process.
- **Due Date**: The final date by which payment should be made.
- **Total Amount**: The amount due for payment in Tanzanian Shillings (TZS).
- **Status**: Indicates whether the bill is expired, paid, or pending **"D".**
- **Action**: A clickable button to view more details about the bill.

**Actions "E"**

- **View**: Clicking on the "VIEW" button will open the invoice details where you can see more information and proceed with payment.

**Navigation “F”**

- **Previous/Next**: Use these buttons to navigate through the list of invoices if you have more than one page of entries.

**Generate New Invoice “B”**

- **Generate New Invoice**: Click this button if you need to create a new invoice for any NBAA services you wish to avail yourself of.

**General Tips**

- Keep an eye on the due dates to ensure you make payments on time to avoid any service interruption.
- Regularly check the status of your bills.
- For expired invoices, contact NBAA support for guidance on how to proceed.
- Use the search function to filter your bills when looking for a specific invoice.

## 3.2 Generating a New Invoice

**Accessing Invoice Generation**

To create a new invoice in the NBAA Membership and Examination Management System, navigate to the ‘’Bills” to “Payments” then to "Generate New Invoice" section. This can usually be done by selecting the 'Generate New Invoice' button in your "My Bills" area or from a similar location within the system.

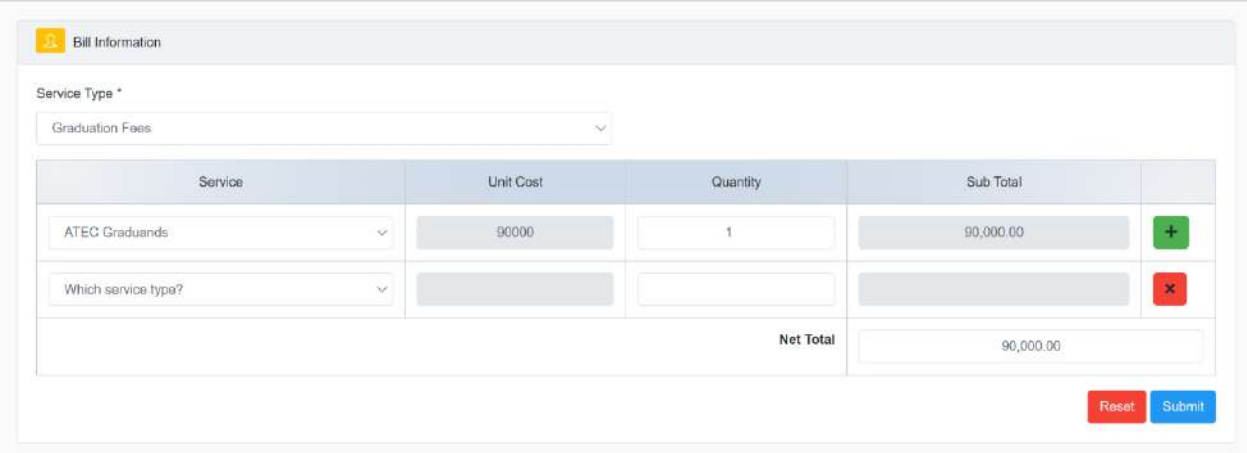



*Figure 3 Generate Invoice*

**Filling in the Invoice Details**

**Service Type Selection**

- **Service Type**: This dropdown menu is used to select the type of service for which you are generating the invoice. It is a required field, marked by an asterisk (*). For instance, select "Graduation Fees" from the list for invoicing graduation-related charges.

**Adding Service Items**

- **Service**: Choose the specific service for which you are being charged. In the example provided, "ATEC Graduands" is selected.
- **Unit Cost**: This field will typically auto-fill based on the service selected, but ensure the amount is correct. In this case, it shows "90,000".
- **Quantity**: Input the quantity for the service. The default value is usually "1".
- **Sub Total**: The subtotal for each service line item will calculate automatically based on the unit cost and quantity. Verify that the "Sub Total" field populates with the correct amount.
- **Add or Remove Service**: Use the green "+" button to add another service line item if needed. If you've added an item by mistake, use the red "x" button to remove it.

**Completing the Invoice**

- **Net Total**: This field calculates the total amount of the invoice automatically, summing up all the subtotals from the service items listed. Confirm that the "Net Total" reflects the correct total charge for the services selected.

**Submitting the Invoice**

Once all the necessary details have been filled out:

- **Reset**: Click this if you need to clear all fields and start over.
- **Submit**: Click this button to submit the invoice for processing. Make sure all information is correct before submitting, as changes might not be possible once the invoice has been issued.

**Additional Information**

- **Required Fields**: All fields marked with an asterisk (*) must be filled out to generate the invoice successfully.
- **Accuracy**: Ensure the accuracy of the quantity and service types, as this will affect the total billing amount.
- **Confirmation**: Upon successful submission, a confirmation message or new screen should appear, providing details on the next steps, such as payment instructions.

## 3.3 Managing Subscription Fee Bills

### Accessing Subscription Fee Bills

When you wish to review and manage your subscription fee bills, select the "Subscription Fee" option within the bills section of the NBAA Membership and Examination Management System.

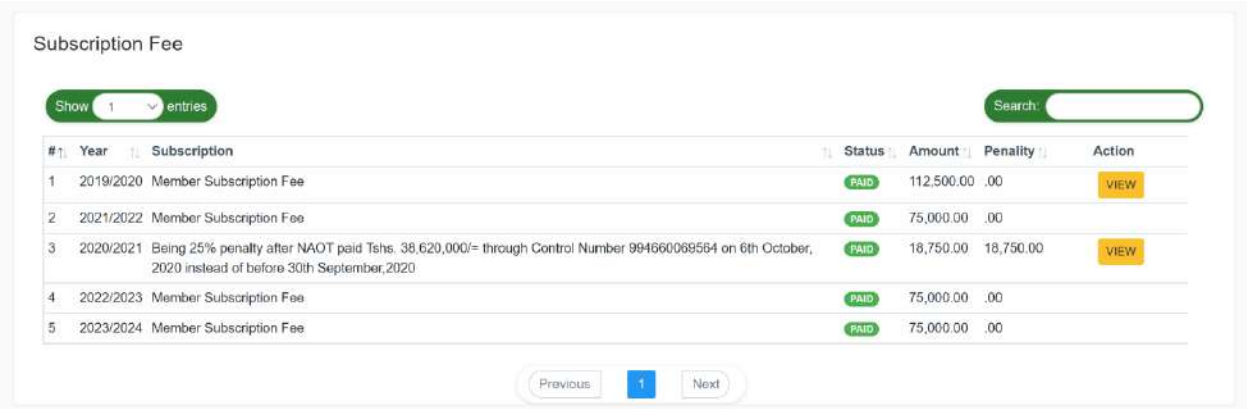



*Figure 4 Manage Subscription*

### Overview of Subscription Fee Bills

The "Subscription Fee" page displays a table with a detailed list of your subscription fee bills over various fiscal years.

### Interacting with the Bills List

- **Show Entries**: Use the dropdown to adjust how many bill entries you want to display on the screen at once.
- **Search**: The search bar allows you to filter the list by any term, like year, subscription type, or status.

### Understanding Your Bills

Each row in the subscription fee bills table includes the following columns:

- **#:** The sequential number of the bill entry.
- **Year:** The fiscal year for which the subscription fee is applicable.
- **Subscription:** Describes the type of subscription, such as "Member Subscription Fee."
- **Status:** Indicates whether the fee has been paid or if there is a penalty for late payment.
- **Amount:** The total amount due for the subscription fee in Tanzanian Shillings (TZS).
- **Penalty:** If applicable, shows any additional charges incurred due to late payment.
- **Action:** A clickable "VIEW" button to see more detailed information or perform actions related to that specific bill.

**Viewing and Managing Bills**

- **Viewing Bill Details**: Click on the "VIEW" button to open a detailed view of the bill, where you can find more comprehensive information, instructions for payment, and the history of transactions.
- **Penalty Notices**: If there's an entry that includes a penalty, it will provide details of the reason for the penalty, the original amount due, and the control number for reference.

**Navigation Through Bill Entries**

- Use the **Previous** and **Next** buttons to navigate between pages if your entries span multiple pages.

**Important Tips**

- Regularly check your subscription fees to stay informed about any new bills or updates to existing ones.
- Pay attention to the "Status" and "Penalty" columns to ensure timely payments and avoid additional charges.
- Utilize the "VIEW" button to understand the full breakdown of charges and payment instructions.

## 3.4 "My Receipt" Section

**Accessing Your Receipts**

To view your payment receipts, click on the "My Receipt" tab or button within the bills section of your user dashboard.

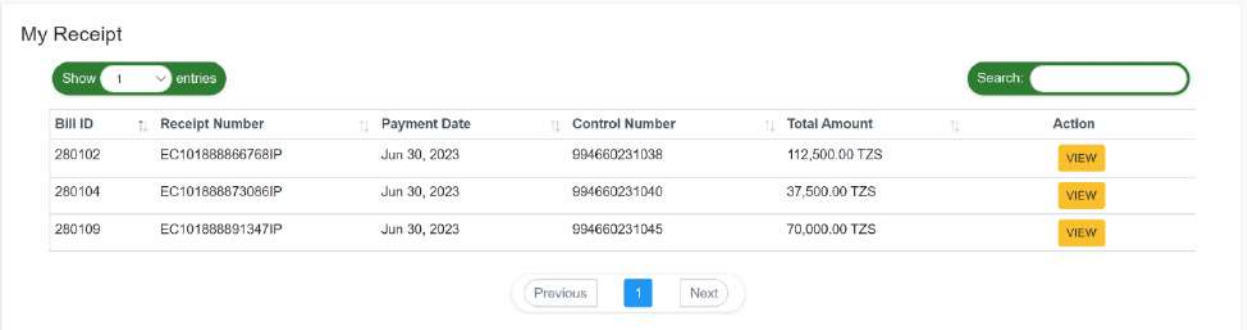



*Figure 5 My Receipts*

**Understanding the "My Receipt" Interface**

The "My Receipt" page provides an organized display of all your payment receipts.

**Navigating Your Receipts**

- **Show Entries**: Select how many receipt entries you want to display at once from the dropdown menu.
- **Search**: Utilize the search bar to filter your receipts by any detail such as Bill ID, Receipt Number, or Control Number.

**Receipt Details Table**

The table on this page lists all the receipts associated with your account, along with several key details:

- **Bill ID**: A unique identifier that links the receipt to a specific bill.
- **Receipt Number**: The identification number of the payment receipt.
- **Payment Date**: The date on which the payment was recorded.
- **Control Number**: A unique code used to track or reference the payment.
- **Total Amount**: The sum paid, listed in Tanzanian Shillings (TZS).
- **Action**: This column contains a "VIEW" button that allows you to open and review a detailed copy of the receipt.

**Reviewing Receipts**

- **View Receipt**: By clicking the "VIEW" button, you can access a detailed version of the receipt, which may include additional information such as payment method, payer details, and the purpose of the payment.

**Pagination Controls**

- **Previous/Next**: Use these buttons to scroll through multiple pages of receipts if your entries exceed the number shown on one page.

**Tips for Managing Receipts**

- It's good practice to regularly review your receipts to ensure all payments have been processed correctly.
- Use the search function to quickly find specific receipts when reviewing your financial records.
- If you need to provide proof of payment, the detailed receipt can typically be printed or saved as a PDF from the view screen.

# 4 REGISTRATION

## 4.1 "Personal Details" Section

### Accessing Personal Details

To update your personal information, navigate to the "Personal Details" section of your account. This section can be accessed from the main menu or dashboard where your profile is managed.

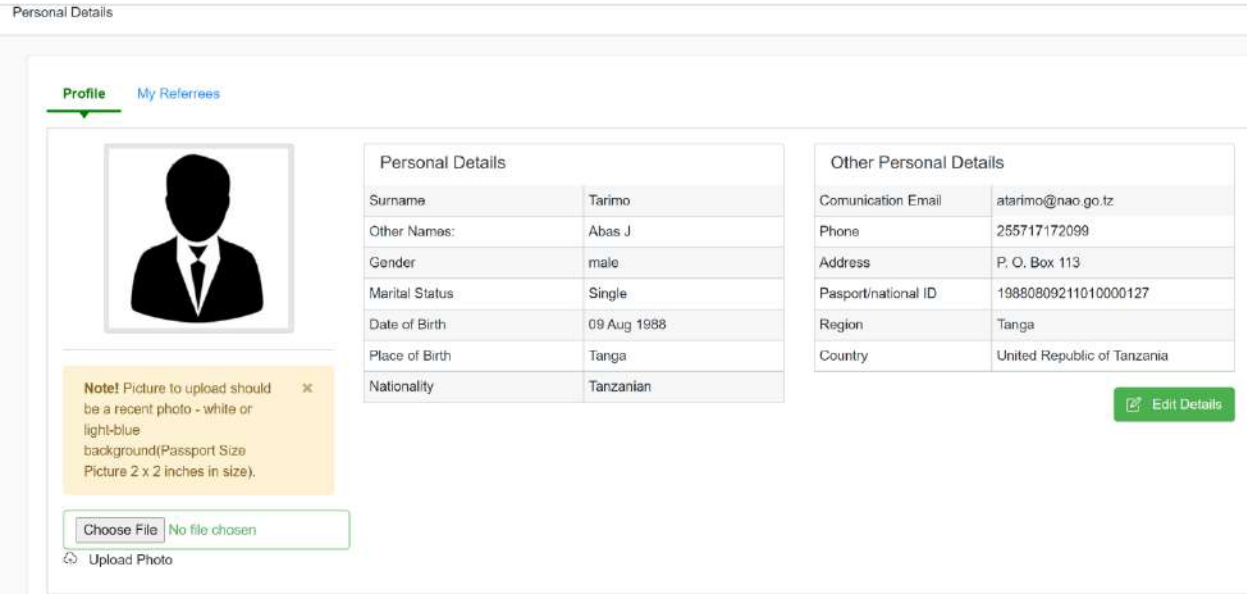



*Figure 6 Profile*

### Profile Overview

### Profile Picture

- **Note on Picture Upload**: Make sure your photo is recent and adheres to the specifications mentioned (white or light-blue background, passport size which is 2 x 2 inches in dimension).
- **Choose File**: Click this button to select the appropriate image file from your computer.
- **Upload Photo**: After choosing the file, click here to upload your profile picture.

### Personal Information

The main area of the "Personal Details" page is divided into two sections:

### Left Section: Basic Details

- **Surname**: Displays your family name.
- **Other Names**: Lists your given name(s).
- **Gender**: Indicates your gender.

- **Marital Status**: Shows your marital status.
- **Date of Birth**: Reflects the date you were born.
- **Place of Birth**: Shows the location where you were born.
- **Nationality**: Indicates your citizenship.

**Right Section: Additional Personal Details**

- **Communication Email**: The email address used for communications.
- **Phone**: Your contact telephone number.
- **Address**: Your postal address.
- **Passport/National ID**: The number of your identification document.
- **Region**: The region of your residence.
- **Country**: The country where you are located.

**Editing Your Details**

- **Edit Details**: To modify any of your personal information, click the 'Edit Details' button. This will allow you to enter a mode where you can update any of the fields present on the page.

**Tips for Updating Your Information**

- Keep your personal details current to ensure that you receive important communications and that your profile remains accurate.
- After any update, review the information to confirm that all details are correct before saving.
- Ensure that your uploaded photo is clear and meets the mentioned requirements, as it will be used to process the certificates. You are required to do the following:
    - Go to the professional photo point centre
    - Take passport photo on a white background, light grey or light blue, size 2x2cm
    - Make sure that the whole face and eyes are fully visible
    - Use a coloured shirt (male) or blouse (female) when taking the photo
    - Collect the passport photo in a soft copy (digital)
    - Upload the passport photo in your MEMS profile
    - **NOTE:**
        - Do not re-photo your passport for uploading
        - Do not take a passport photo by a mobile phone for uploading

- Make sure that the passport photo to upload is recently taken (at least within six months)
- Make sure that no distortion due to reflection from sunglasses (do not put tinted sun glasses when taking the passport photo)

### 4.1.1 Editing Personal Details

**Accessing the Edit Form**

To modify your personal details, click on the "Edit Details" button in the "Personal Details" section. This will open the "Edit Personal Details" pop-up form.

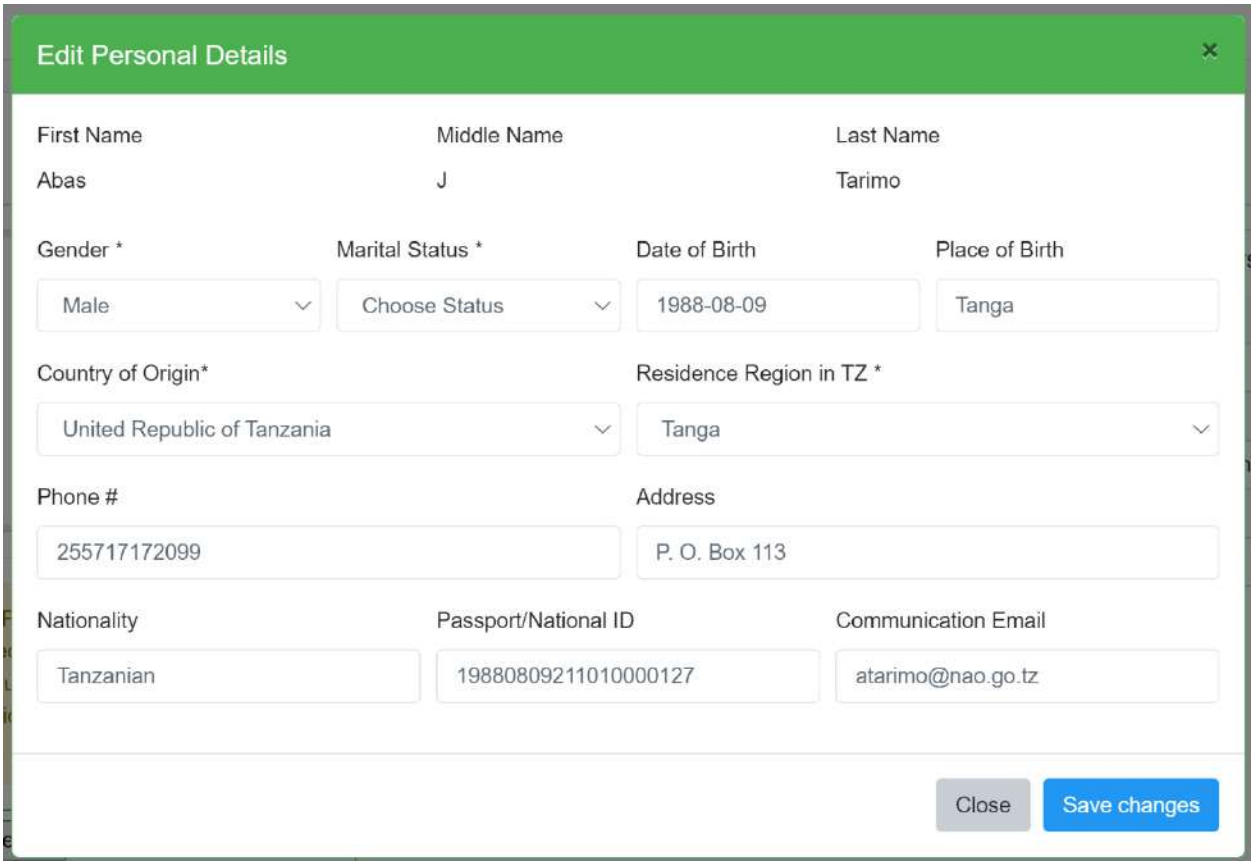



*Figure 7 Edit Personal Details*

**Editing Your Information**

**Personal Information Fields**

- **First Name**: Your given name.
- **Middle Name**: Your additional given name, if applicable.

- **Last Name**: Your family name.
- **Gender**: Select your gender from the dropdown menu.
- **Marital Status**: Choose your marital status from the dropdown options.
- **Date of Birth**: Enter your birthdate in the format (YYYY-MM-DD).
- **Place of Birth**: Type in your birth city or locality.

**Contact and Identification Fields**

- **Country of Origin**: Select your country of origin from the dropdown menu.
- **Residence Region in TZ**: If you are a resident of Tanzania, select your region from the dropdown.
- **Phone #**: Enter your contact phone number.
- **Address**: Type in your postal address.
- **Nationality**: Enter your nationality.
- **Passport/National ID**: Provide your passport number or national identification number.
- **Communication Email**: Enter your email address used for communication.

**Saving Changes**

- Review all entered details to ensure accuracy.
- Once you've made the necessary changes, click the **Save changes** button to update your personal details in the system.

**Cancelling the Process**

- If you decide not to make any changes, you can click the **Close** button to exit the edit form without saving any new data.

**Tips for Editing Details**

- Fields marked with an asterisk (*) are mandatory and must be completed.
- Ensure the information entered matches your legal documents to avoid discrepancies.
- Always double-check your details before saving to prevent errors in your official records.

### 4.1.2 "My Referees" Section

**Accessing "My Referees"**

To manage your list of referees, select the "My Referees" tab within the profile or personal details section of your account.

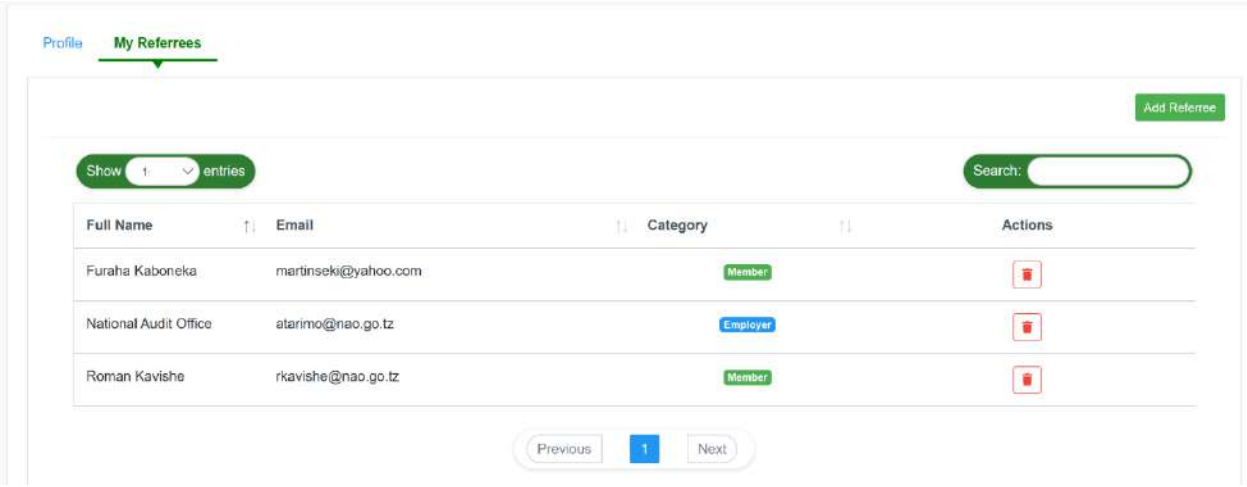



*Figure 8 My Referee List*

**Navigating the "My Referees" Interface**

**Referee List Overview**

- **Show Entries**: Use the dropdown to select the number of referee entries you wish to view on the page.
- **Search**: Use the search bar to quickly find specific referees by their name or email.

**Referee Table**

- **Full Name**: Displays the name of the referee.
- **Email**: Lists the referee's email address.
- **Category**: Indicates the relationship or category of the referee (e.g., Member, Employer).
- **Actions**: Actions you can take related to each referee, such as deleting their information from your list.

**Adding a Referee**

- **Add Referee**: Click this button to begin the process of adding a new referee to your list.

**Managing Referee Entries**

- **Deleting a Referee**: To remove a referee from your list, click the red trash bin icon in the Actions column corresponding to the referee you wish to delete.

**Pagination**

- If your list of referees spans multiple pages, use the **Previous** and **Next** buttons to navigate between the pages.

**Adding or Deleting Referees**

**To Add a Referee**

- Click the "Add Referee" button.
- Fill in the referee's details in the form provided, including their full name, email, and the category of their relationship to you.
- Submit the form to add the referee to your list.

**To Delete a Referee**

- Locate the referee you want to remove.
- Click the red trash bin icon in their row under Actions.
- Confirm the deletion if prompted, to remove the referee from your list.

**Tips for Managing Referees**

- Keep your referees updated to reflect current professional and personal relationships.
- Verify the accuracy of the email addresses for your referees, as they may be contacted for verification purposes.
- Use the search function to filter your list and manage multiple referees more efficiently.

### 4.1.3 Adding a Referee

**Opening the "Add Referee" Dialog**

To nominate a new referee to your profile, you would initiate the process by clicking on an "Add Referee" button typically located in the "My Referees" section.

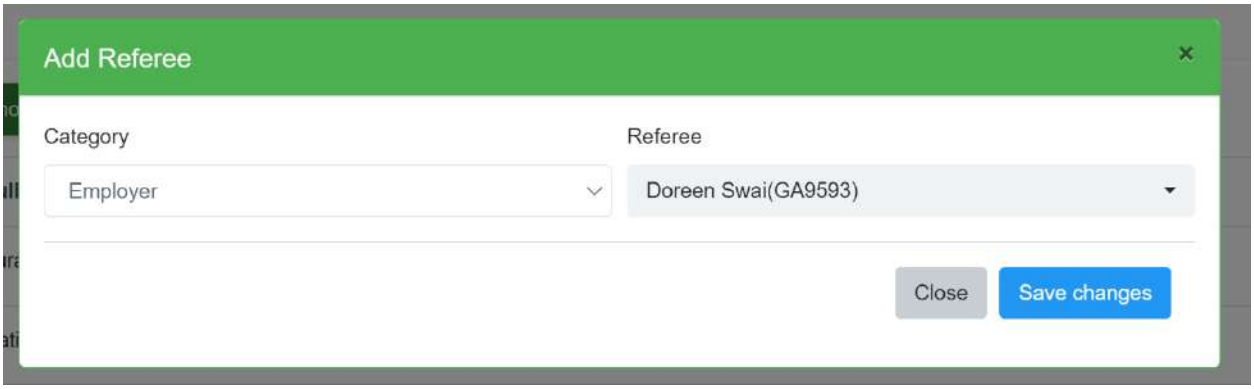



*Figure 9 Adding Referee*

**How to Add a New Referee**

**Step 1: Select Referee Category**

- **Category**: Click on the dropdown menu to select the appropriate category for your referee, such as "Employer," "Member," or other relevant categories provided by the dropdown list.

**Step 2: Select Referee**

- **Referee**: Click into the textbox or dropdown menu to select from a list of potential referees. You may need to type the name or ID to search for the specific person, such as "Doreen Swai(GA9593)."

**Step 3: Save the Changes**

- Once the referee's category and name are correctly entered, click the **Save changes** button to add the referee to your list.

**Finalizing or Canceling**

- If you have entered all the necessary information and are ready to update your referee list, ensure that you click the **Save changes** button to commit the changes.
- If you change your mind or need to correct something later, you can cancel the action by clicking the **Close** button. This will close the dialog without saving any changes.

**Additional Tips**

- Make sure the information about your referee is accurate and up-to-date.
- Confirm with your referees before adding them to ensure they are willing to vouch for you.
- Be aware that the referees you add may be contacted for verification, so it’s important to choose individuals who can positively attest to your professional or personal qualifications.

## 4.2 Academic Qualification Section

### Accessing Academic Qualifications

To view and manage your academic qualifications, navigate to the "Qualifications List" section, which is divided into two parts: "University/College Qualification" and "Ordinary & Advanced Level Education".

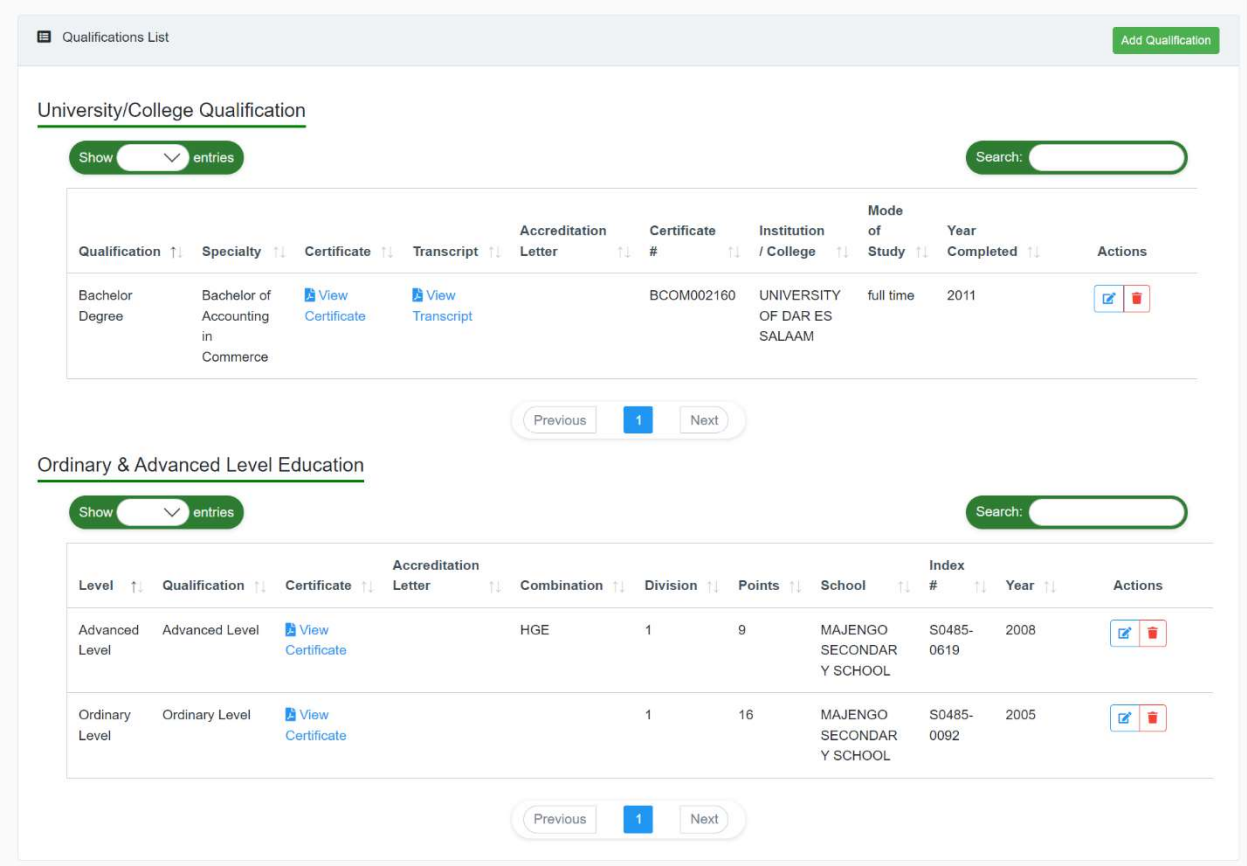



*Figure 10 Qualification List*

### University/College Qualification

### Viewing and Managing University/College Qualifications

- **Show Entries**: Select the number of qualifications to display at once from the dropdown menu.
- **Search**: Use the search bar to quickly locate specific qualifications by any column such as qualification, institution, or year completed.

### Qualification Details

Each entry includes several columns:

- **Qualification**: The degree or qualification obtained.

- **Specialty**: The specific field of study.
- **Certificate**: A link to view the certificate.
- **Transcript**: A link to view the academic transcript.
- **Accreditation Letter**: The accreditation reference number.
- **Institution/College**: The name of the institution where the qualification was obtained.
- **Mode of Study**: Indicates whether the study was full-time, part-time, etc.
- **Year Completed**: The year of completion.

**Actions**

- **View/Edit**: Use the icons in the "Actions" column to view or edit qualification details.
- **Add Qualification**: Click this button to add a new university or college qualification to your list.

**Ordinary & Advanced Level Education**

**Viewing and Managing Secondary Education Qualifications**

- **Show Entries**: Adjust the number of entries shown at once.
- **Search**: Find specific qualifications by details like level, school, or year.

**Qualification Details**

- **Level**: The education level, such as "Advanced Level" or "Ordinary Level".
- **Qualification**: The name of the qualification.
- **Certificate**: A link to view the educational certificate.
- **Accreditation Letter**: Reference for the accreditation.
- **Combination**: Subject combination studied.
- **Division**: The division or grade achieved.
- **Points**: The points scored.
- **School**: The name of the secondary school.
- **Index #**: The examination index number.
- **Year**: The year when the level was completed.

**Actions**

- **View/Edit**: Click the pencil icon to edit or update secondary education details.
- **Delete**: Press the trash bin icon to remove a qualification from your list.
- **Add Qualification**: Click to add new secondary education qualifications.

**Pagination for Both Sections**

- Use the **Previous** and **Next** buttons to navigate through multiple pages if more entries exist beyond the displayed limit.

### 4.2.1 Adding Academic Qualifications

**Accessing the Add Qualification Form**

Click on the "Add Qualification" button, usually located in the "Qualifications List" section, to open a form where you can input details about your academic history.

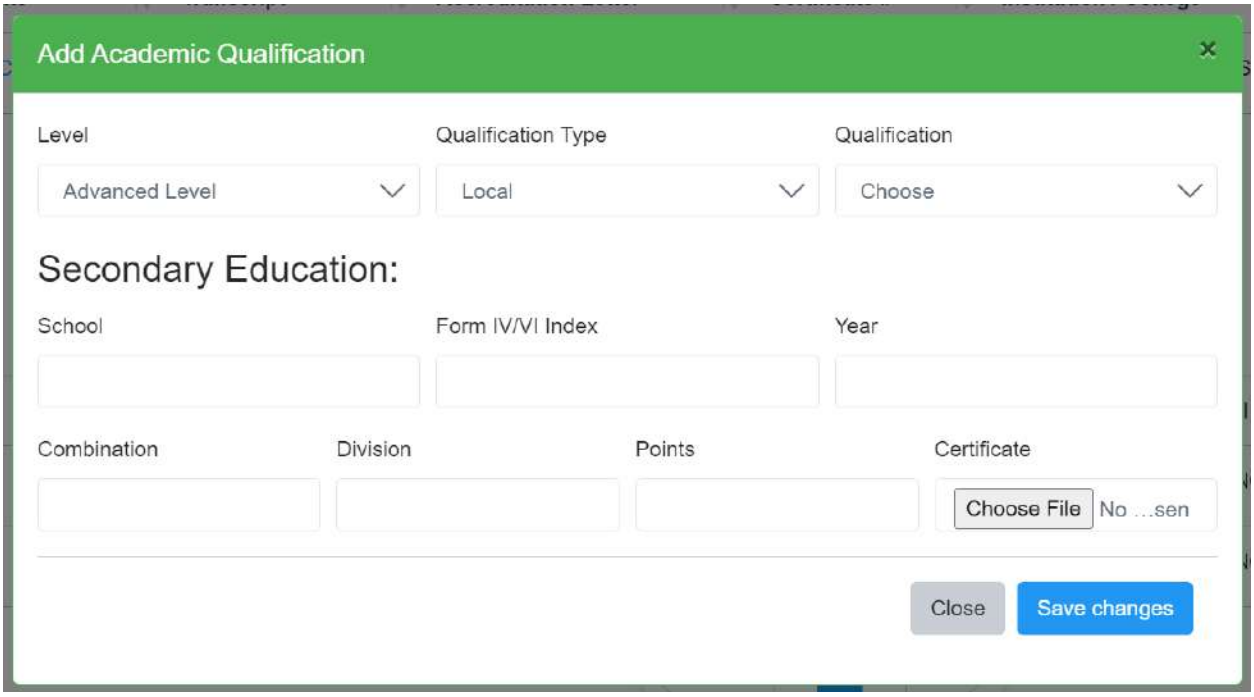



*Figure 11 Add Academic Qualification (Secondary School)*

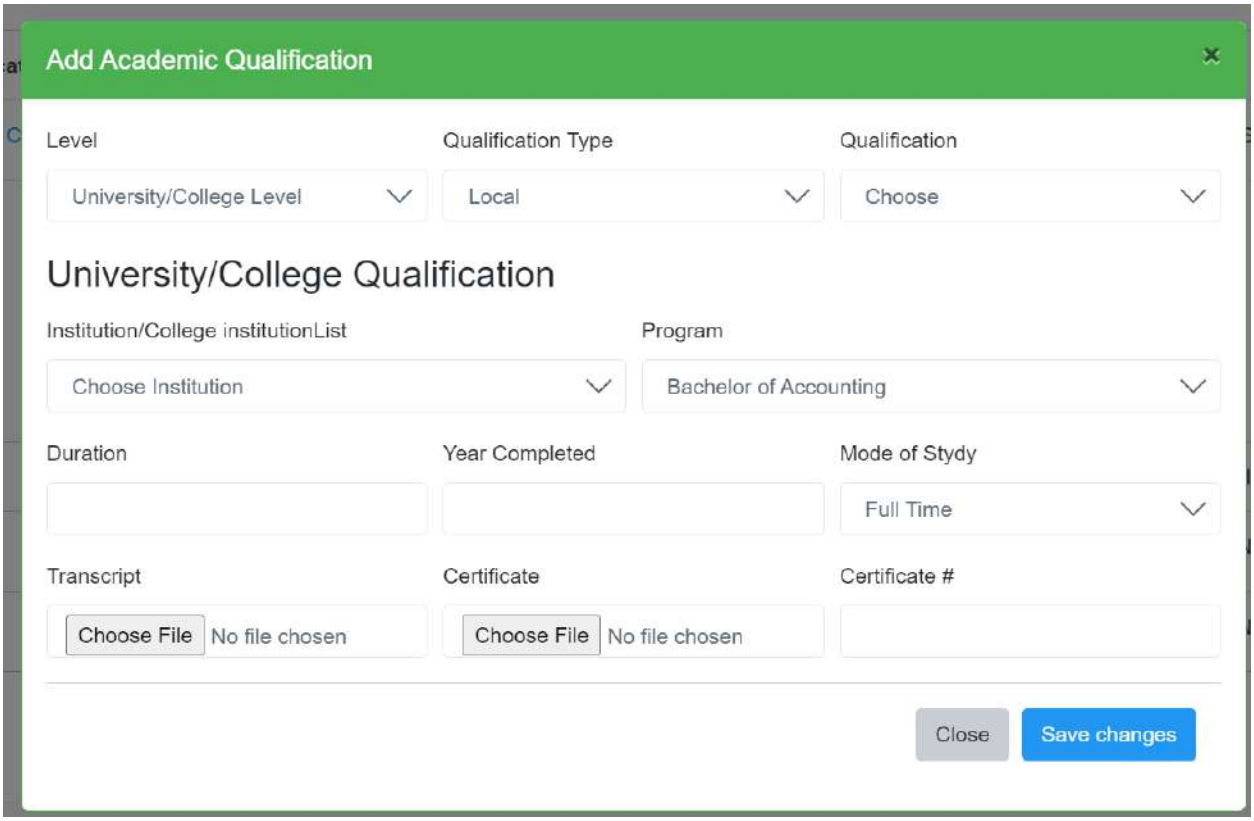



*Figure 12 Add Academic Qualification (University)*

**Adding a Secondary Education Qualification**

**Form Fields for Secondary Education:**

- **Level**: Select "Ordinary Level" or "Advanced Level" from the dropdown menu.
- **Qualification Type**: Choose the type of qualification, such as local or international.
- **School**: Enter the name of the school where you completed your secondary education.
- **Form IV/VI Index**: Provide your index number from the national exams.
- **Year**: Input the year of completion.
- **Combination**: Specify the subject combination taken, if applicable.
- **Division**: Enter the division or class you obtained.
- **Points**: Fill in the points scored, if available.
- **Certificate**: Click "Choose File" to upload a digital copy of your certificate.

Once all the information is entered, click "Save changes" to add this qualification to your profile.

**Adding a University/College Level Qualification**

**Form Fields for University/College Qualification:**

- **Level**: Select "University/College Level" from the dropdown menu.
- **Qualification Type**: Choose the type of qualification (e.g., Diploma, Bachelor's, Master's).
- **Qualification**: Select the specific qualification you have obtained, like "Bachelor of Accounting."
- **Institution**: Choose the institution from which you graduated.
- **Program**: Select the program of study.
- **Duration**: Enter the duration of the program.
- **Year Completed**: Input the year you completed the qualification.
- **Mode of Study**: Specify whether the study was full-time, part-time, or distance learning.
- **Transcript**: Upload the transcript by clicking "Choose File."
- **Certificate**: Upload a copy of the certificate similarly.
- **Certificate #**: If applicable, enter the certificate number.

After filling out all necessary fields, click on "Save changes" to add the university or college qualification to your academic records.

**Finalizing or Canceling**

- After entering all the details, always review the information for accuracy before saving.
- If you need to correct something or do not wish to add the qualification at this time, click "Close" to exit the form without saving.

**Additional Instructions**

- Ensure that all uploaded documents are clear, legible, and in the accepted file formats.
- Keep a record of your qualification numbers and other details for future reference.
- Note that you may need to verify these qualifications, so ensure accuracy in the information provided.

## 4.3 Accounting Professional Qualification Section

**Accessing Accounting Professional Qualifications**

To manage your professional accounting qualifications, go to the "Accounting Professional Qualification List" within your account portal.

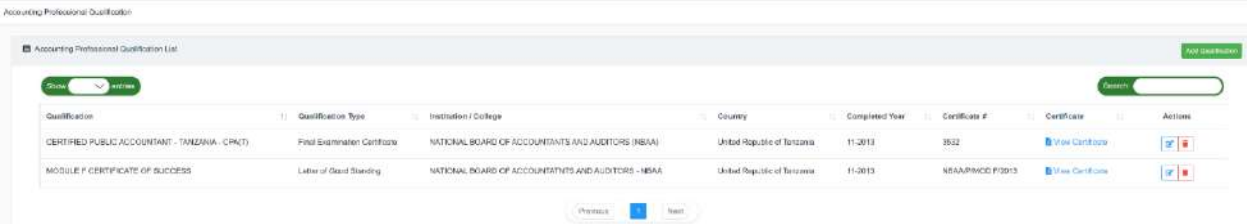


*Figure 13 Accounting Professional List*

**Accounting Professional Qualification Section**

**Accessing Accounting Professional Qualifications**

To manage your professional accounting qualifications, go to the "Accounting Professional Qualification List" within your account portal.

**Overview of Professional Qualification Interface**

**Displaying Entries**

- **Show Entries**: Use the dropdown menu to select how many qualification entries you wish to display on the screen at a time.

**Qualification Entries**

Each row in your qualification list provides the following details:

- **Qualification**: The name of the professional qualification you have obtained.
- **Qualification Type**: Specifies the type of qualification, such as a certificate or letter of good standing.
- **Institution/College**: The institution from which the qualification was awarded.
- **Country**: The country where the institution is located.
- **Completed Year**: The year you completed the qualification.
- **Certificate #**: The unique number associated with your certification.
- **Certificate**: A link to view the digital copy of your certificate.

**Managing Qualifications**

- **View Certificate**: Click the "View Certificate" link to open or download a copy of your professional certificate.
- **Actions**: Use the edit (pencil icon) to modify details of your qualification or the delete (trash bin icon) to remove the qualification from your list.

**Adding a Qualification**

- **Add Qualification**: Click this button to add a new professional qualification to your list.

**Searching for Qualifications**

- **Search**: Use the search bar to quickly find specific qualifications by any listed detail such as qualification name, institution, or completion year.

**Pagination**

- Use the **Previous** and **Next** buttons to navigate through multiple pages if your qualifications list exceeds the number displayed.

**Adding or Editing Qualifications**

**To Add a New Qualification**

- Click the "Add Qualification" button.
- Fill out the form with the qualification details, including the name of the qualification, issuing institution, completion year, and certificate number.
- Upload a digital copy of your certificate if required.
- Save your changes to update your qualifications list.

**To Edit an Existing Qualification**

- Click the edit (pencil icon) next to the qualification you wish to update.
- Adjust any details in the form that appears.
- Save your changes to retain the updated information.

### 4.3.1 Adding an Accounting Professional Qualification

**Initiating the Process**

To begin adding a new accounting professional qualification:

1. Click on the “Add Qualification” button, usually found within the "Accounting Professional Qualification List" section of your profile.

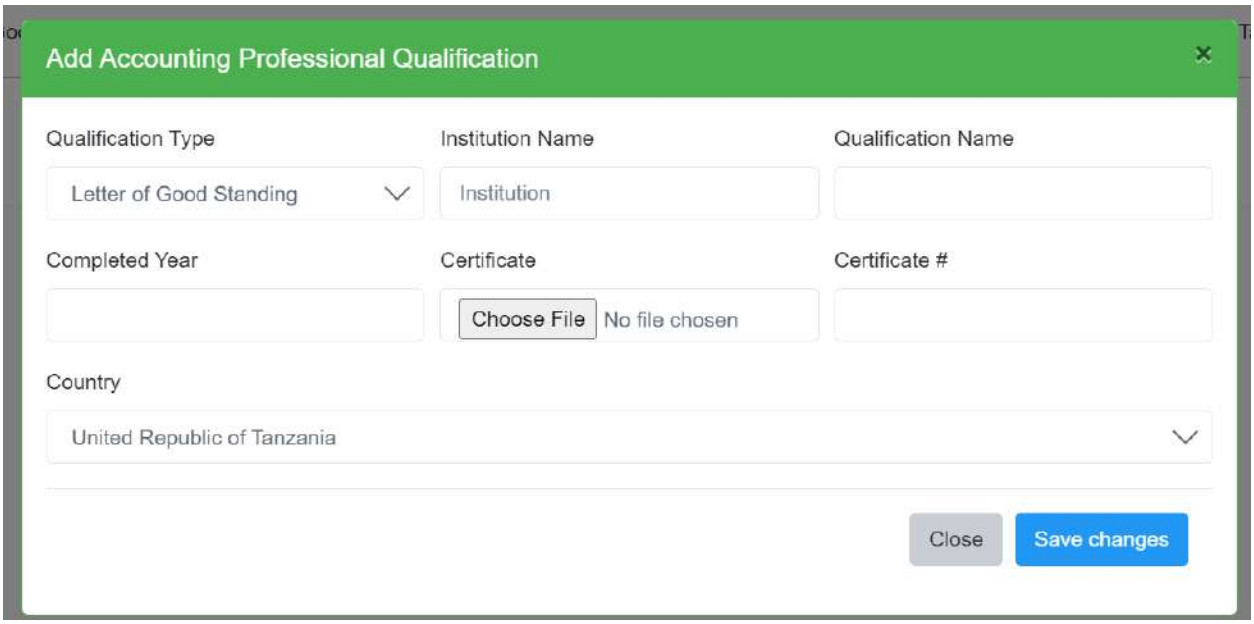



*Figure 14 Add Accounting Professional Qualification*

**Completing the Qualification Details Form**

**Enter the Qualification Information:**

- **Qualification Type**: Select the type of qualification from the dropdown, such as "Letter of Good Standing" or "Final Examination Certificate."
- **Institution Name**: Enter the name of the institution from where you received the qualification.
- **Qualification Name**: Provide the official name of the qualification, e.g., CPA, ACCA, etc.
- **Completed Year**: Type in the year when you completed the qualification.
- **Certificate**: Click on "Choose File" to upload a scanned image or digital copy of your qualification certificate.
- **Certificate #**: If applicable, input the unique certificate number associated with your qualification.
- **Country**: Select the country where the qualification was obtained, if the dropdown is available, or type it in if the field is a textbox.

**Uploading Required Documents:**

Ensure that the files you upload are in a supported format and clear enough to verify your qualification details.

**Saving or Canceling:**

- **Save changes**: After you have entered all the required information and uploaded the necessary documents, click "Save changes" to add the qualification to your profile.

- **Close**: If you need to exit without saving, click "Close."

**Review and Confirmation**

- Double-check all entered data for accuracy before saving, as this information will be part of your official record.
- Ensure that the uploaded certificates are correct and visible, as they may need to be verified.

## 4.4 Managing "My Work History"

**Accessing "My Work History"**

To view and edit your professional experiences:

1. Navigate to the “Registration” then to "Work Experience" tab on your profile or dashboard.
2. This will display your recorded work history.

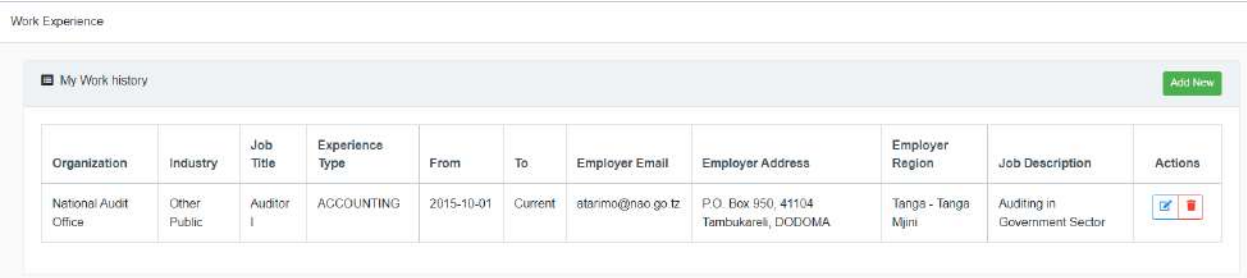



*Figure 15 My Work History*

**Overview of the Work History Section**

- The work history table provides a snapshot of each professional experience, including details such as organization, job title, duration, and more.

**Adding New Work Experience**

1. **Add New**: Click on the "Add New" button typically located above the work history table.
2. Find in the list of details of your work experience provided, which includes:
    - Organization Name
    - Industry
    - Job Title
    - Experience Type
    - Duration (From and To dates)
    - Employer Contact Information (Email and Address)
    - Employer Region

- Job Description

**Viewing and Editing Work Experience**

1. In the "Actions" column, you will typically find options to either view more details or edit the entry.
    - **View Details**: Click on the icon (often an eye symbol or "View" link) to open a detailed view of your work experience.
    - **Edit**: Click on the pencil icon to modify any details of your work experience. Remember to save any changes you make.

**Deleting Work Experience**

- If you need to remove an experience from your work history:
    - Click on the trash bin icon in the corresponding row under the "Actions" column.
    - Confirm the deletion in the prompt to ensure the entry is permanently removed from your list.

**Tips for Managing Your Work History**

- Keep your work history up to date by regularly adding new experiences as they occur.
- Ensure accuracy in the dates and descriptions to maintain a reliable record of your professional journey.
- Use the "Search" feature to quickly find specific experiences or roles.

### 4.4.1 Adding Work Experience

**Starting the Process**

1. **Access the Form**: Click on the "Add Work Experience" button, generally found in the "Work Experience" or "My Work History" section of your profile.

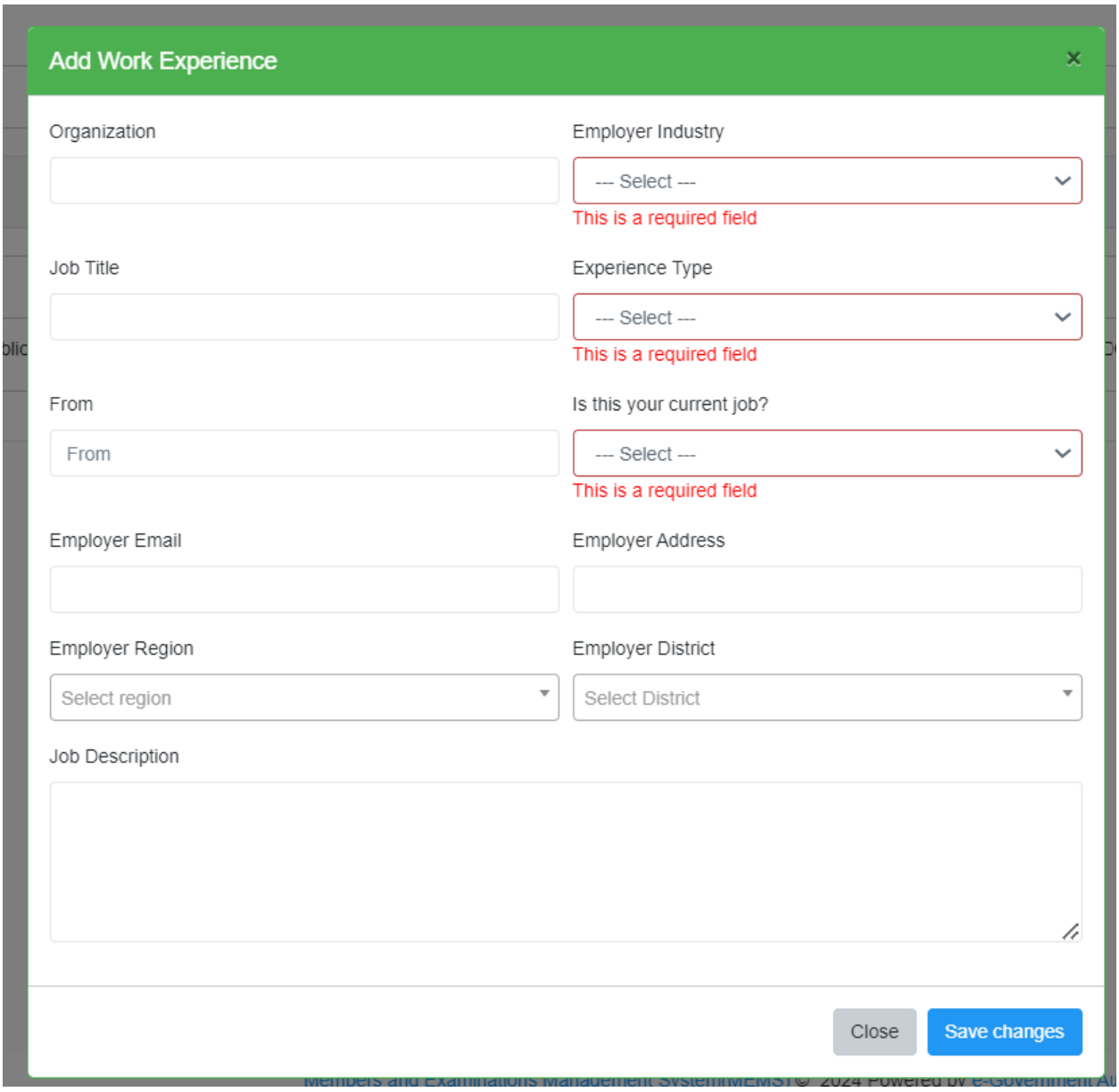



*Figure 16 Add work Experience*

**Filling Out the Work Experience Form**

Fill in each field with the relevant details:

- **Organization**: Enter the name of the company or organization where you worked.

- **Employer Industry**: Select the industry from the dropdown menu.
- **Job Title**: Provide your job title or position.
- **Experience Type**: Choose the type of experience from the dropdown, such as full-time, part-time, or internship.
- **From**: Enter the date you started this job.
- **Is this your current job?**: Indicate whether you are still employed in this role.
- **Employer Email**: Input the email address of your employer or HR department.
- **Employer Address**: Fill in the physical address of the organization.
- **Employer Region**: Select the region from the dropdown menu where the organization is located.
- **Employer District**: Choose the district from the dropdown menu, if applicable.
- **Job Description**: Provide a brief description of your role and responsibilities.

**Completing the Addition**

1. **Review the Information**: Double-check all details for accuracy, as this information will be used in your professional profile.
2. **Save the Changes**: Click on the "Save changes" button to add the new work experience to your history.
3. **Close**: If you decide not to add the experience at this time, click the "Close" button to exit the form without saving.

**Tips for Adding Work Experience**

- Be concise yet descriptive in your job description to give a clear picture of your role.
- If you are still working at the job, make sure to select the current job option to reflect ongoing employment.
- Always keep the contact information for your employer updated in case it is needed for verification.

# 5 PRACTICAL EXPERIENCE

## 5.1 "Placement" Under Practical Experience

### Accessing Placement Details

To review or update your placement details related to practical experience:

1. From your main dashboard, navigate to the "Practical Experience" section.
2. Within this section, locate and click on the "Placement" submenu to view your placement records.

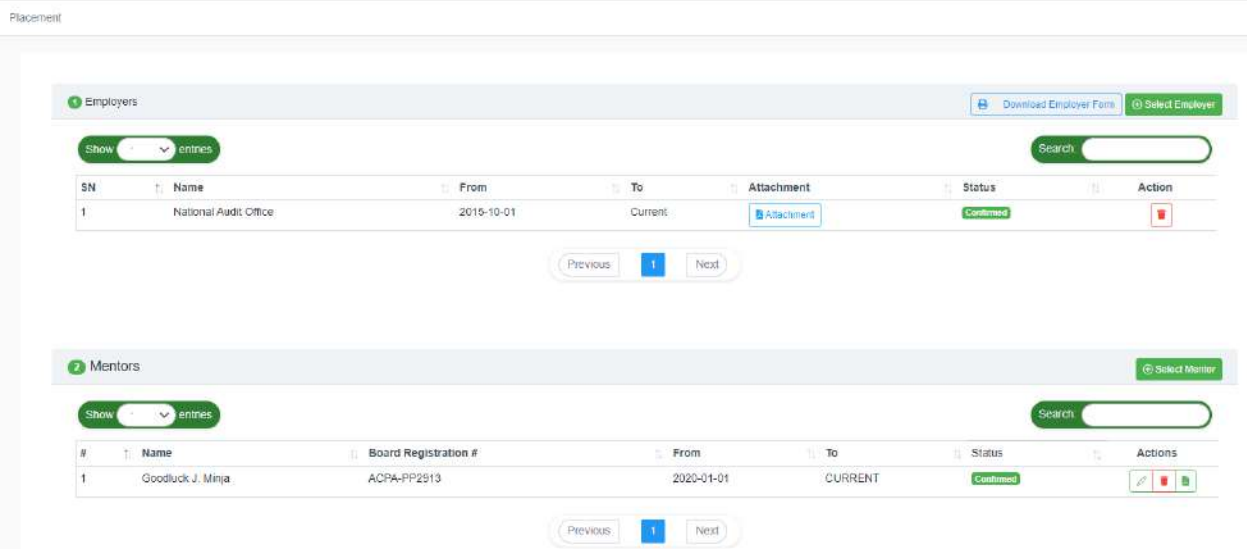



*Figure 17 Placements*

### Understanding the Placement Section

This section is divided into two parts: "Employers" and "Mentors".

### Employers Section

- **Show Entries**: Use this dropdown to select how many employer entries to display.
- **Search**: Use the search bar to filter the displayed entries by specific criteria.
- **SN (Serial Number)**: Represents the order of the entry.
- **Name**: The name of the organization where you were placed.
- **From/To**: The duration of your placement.
- **Attachment**: If available, click to view an attachment related to the placement.
- **Status**: Indicates the confirmation status of the placement.

- **Action**: The icons represent the possible actions, such as editing or deleting an entry.

**Actions in Employers Section**

- **Download Employer Form**: Download the required form or document pertaining to your placement.
- **Select Employer**: Choose from a list of potential employers or add a new one to your history.

**Mentors Section**

- **Show Entries**: Adjust the number of mentor entries to show.
- **Search**: Quickly locate specific mentor information.
- **Name**: Displays the name of the mentor assigned or chosen for the practical experience.
- **Board Registration #**: The mentor's professional registration number.
- **From/To**: The duration of mentorship.
- **Status**: The current status of the mentorship, such as "Confirmed".

**Actions in Mentors Section**

- **Edit**: Modify details of your mentorship record.
- **Delete**: Remove the mentorship entry.
- **Select Mentor**: Choose a mentor for your practical experience from the available list or add a new one.

**Adding or Editing Placement Entries**

**To Add a New Employer or Mentor**

- Click on the "Add New" button, which might be represented by a plus sign or explicitly labeled.
- Fill out the form with all required details, such as organization name, duration, mentor's name, and board registration number.
- Upload any attachments if necessary.
- Click "Save changes" to add the new entry to your placement history.

**To Edit an Existing Placement Entry**

- Click on the pencil icon in the "Actions" column next to the entry you wish to change.
- Update any details as necessary in the form that appears.
- Save your changes to ensure the record reflects the updated information.

**Tips for Placement Management**

- Keep a well-documented record of all your placements as they play a critical role in your practical experience.
- Regularly review and update your placement details to ensure they are current and accurately reflect your professional journey.

### 5.1.1 Adding an Employer

**Accessing the Employer Selection**

1. **Open the Dialog**: Navigate to the "Placement" submenu within "Practical Experience" and click the "Select Employer" button to bring up the employer selection dialog.

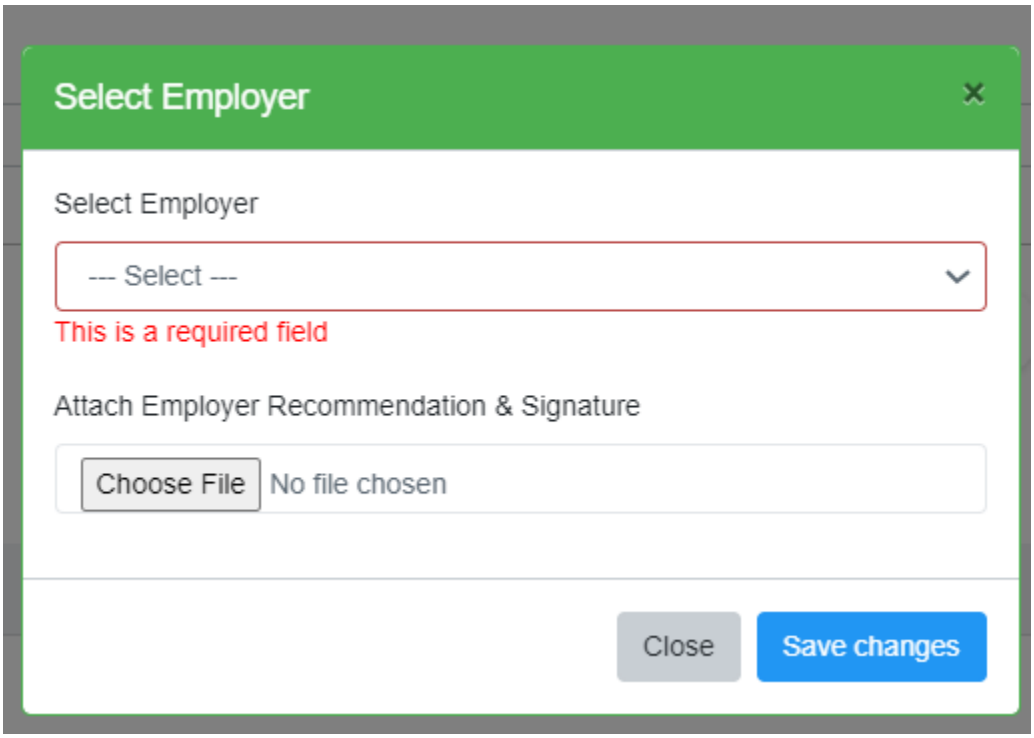



*Figure 18 Add Employer*

**Selecting an Employer**

2. **Choose an Employer**:
    - Click on the dropdown menu labelled "Select Employer".
    - Scroll through the list and click on your employer's name. This field is mandatory, so you must select an option to proceed.

**Attaching Recommendation and Signature**

3. **Upload Supporting Documents**:

- Click on "Choose File" to upload a document that includes your employer's recommendation and signature.
- Select the appropriate file from your device. Note that this step might be required for verification purposes, so ensure that you have the correct document ready to upload.

**Saving the Information**

4. **Save the Changes**:
    - After selecting your employer and attaching the necessary documentation, click the "Save changes" button to add the employer to your placement records.
    - If the employer you're looking for is not listed, you may need to contact your system administrator or follow alternative steps to add a new employer to the system.

**Closing the Dialog**

5. **Close**: If you need to exit without adding an employer, simply click the "Close" button. No changes will be saved if you close the dialog without saving.

**Tips for Adding an Employer**

- Ensure the employer's recommendation and signature are clear and legible on the document you are uploading.
- Double-check the employer's information before saving to avoid any errors.
- Keep a personal copy of the recommendation letter for your records.

### 5.1.2 Adding a Mentor

**Opening the Mentor Selection Form**

To associate a mentor with your professional development:

1. **Open the Form**: Click the "Select Mentor" button in the relevant section of your dashboard, often found within "Placement" or "Practical Experience."

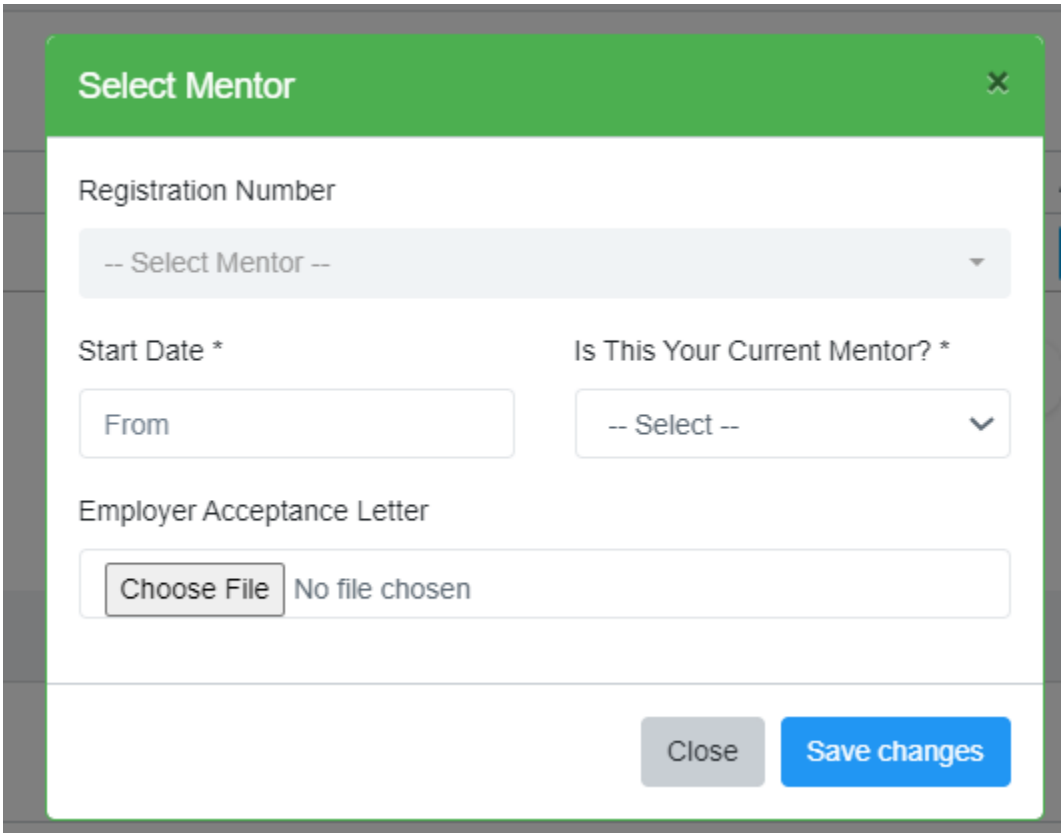



*Figure 19 Add Mentor*

**Selecting a Mentor**

2. **Registration Number**:
    - Click on the "Select Mentor" dropdown menu.
    - Choose a mentor by their registration number from the list provided. If your mentor is not listed, you may need to contact the system administrator to update the list.

**Setting the Mentorship Details**

3. **Start Date**:
    - Enter the start date of the mentorship in the "From" field. This date marks the beginning of your professional relationship with the mentor.

4. **Is This Your Current Mentor?**:
    - Select "Yes" or "No" from the dropdown to indicate whether this is an ongoing mentorship.

**Attaching Relevant Documents**

5. **Employer Acceptance Letter**:
    - Click "Choose File" to upload the employer acceptance letter or any other document that verifies the mentorship.
    - Make sure the file is in an accepted format and that the information within is clear and legible.

**Finalizing the Mentorship Entry**

6. **Save Changes**:
    - After entering all the required details and attaching the necessary document, click the "Save changes" button to add the mentor to your professional profile.
7. **Close**:
    - If you need to exit without saving, select the "Close" button. Remember, no changes will be saved if you close the form without saving.

**Tips for Adding a Mentor**

- Verify that the mentor's registration number matches the individual you've worked with to ensure accuracy in your records.
- Double-check the start date and the status of the mentorship before saving.
- Keep a copy of all submitted documentation in your personal records for future reference.

## 5.2 Managing "Logbook List"

**Accessing Logbook Entries**

To manage and review your logbook entries:

1. Navigate to the "Logbooks" section within your profile or dashboard.

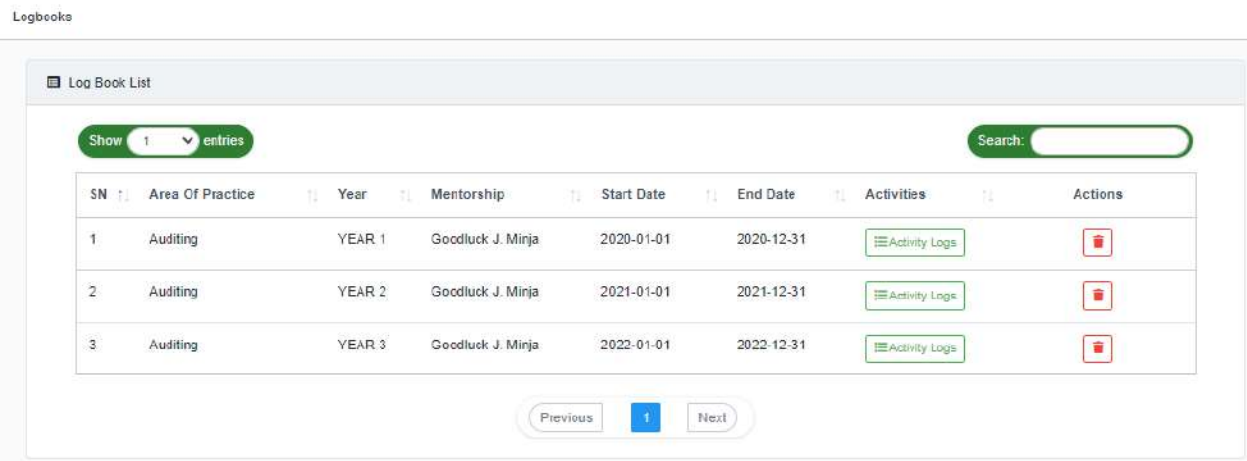



*Figure 20 Logbook List*

**Understanding the Logbook List**

- The logbook list displays your practical experience, organized by year and area of practice.

**Table Overview**

- **Show Entries**: Adjust the dropdown to select the number of logbook entries to display on one page.
- **SN (Serial Number)**: Lists the logbook entries in sequential order.
- **Area Of Practice**: Shows the specific field of work, such as Auditing.
- **Year**: Indicates the year of the logbook entry.
- **Mentorship**: Displays the name of your mentor for that period.
- **Start Date/End Date**: Details the duration of the recorded experience.
- **Activities**: Provides a link to view the activities you logged during that time frame.

**Actions**

- **Activity Logs**: Click on this button to view detailed entries of activities you have logged.
- **Edit/Delete**: Use the pencil icon to edit an entry, or the trash bin icon to delete it.

**Searching for Logbook Entries**

- **Search**: Use the search bar to quickly find specific entries by area of practice, mentor's name, or date.

**Adding and Editing Logbook Entries**

To add or edit logbook entries:

- **Add Logbook Entry**: Click on a button, usually labeled "Add New" or represented by a plus sign, to create a new logbook entry.

- **Edit**: Select the pencil icon to modify details of an existing entry.

**Saving Changes**

- Once you've added or edited your logbook entry, make sure to save your changes to update your records.

**Pagination**

- Use the "Previous" and "Next" buttons to navigate through your logbook entries if there are multiple pages of records.

**Tips for Managing Your Logbook**

- Keep your logbook entries detailed and up-to-date, as they are crucial for tracking your professional development.
- Regularly review past entries to ensure accuracy and completeness.
- Ensure that all activities logged are relevant to your area of practice and are endorsed by your mentor.

### 5.2.1 Logbook Activities

**Accessing Logbook Activities**

To access and manage your logbook activities, navigate to the "Logbooks" section and select the specific year or period you wish to view, such as "YEAR 1 - Log Book."

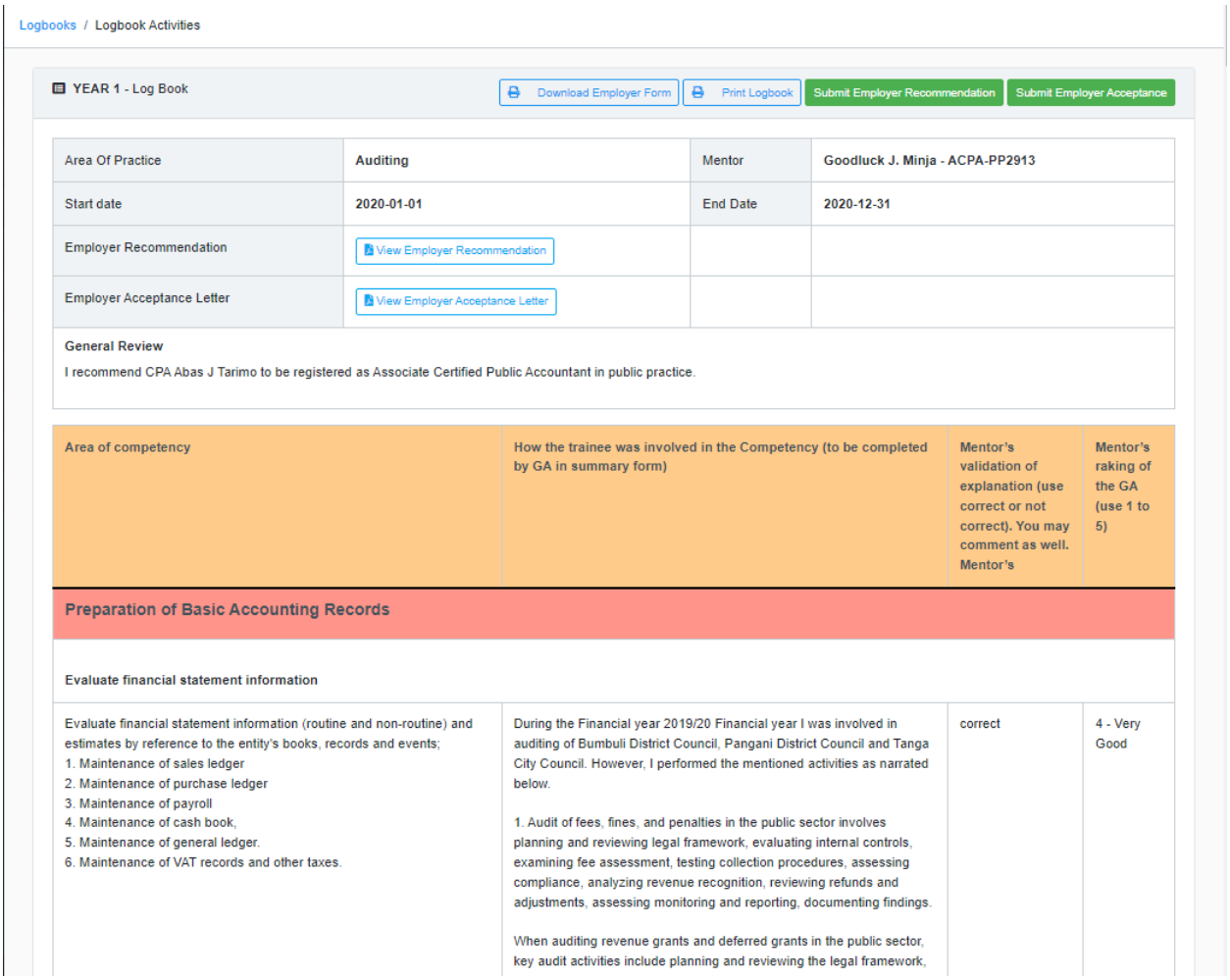



*Figure 21 Filled Logbook per specific Year*

**Logbook Activities**

**Accessing Logbook Activities**

To access and manage your logbook activities, navigate to the "Logbooks" section and select the specific year or period you wish to view, such as "YEAR 1 - Log Book."

**Overview of the Logbook Activities Page**

- **Area Of Practice**: Displays the field you are gaining experience in, such as Auditing.
- **Start and End Date**: Shows the time frame of the logbook activities.
- **Mentor**: Lists the name and registration number of your professional mentor.
- **Employer Recommendation**: Click "View Employer Recommendation" to see the comments and recommendations provided by your employer.
- **Employer Acceptance Letter**: Click "View Employer Acceptance Letter" to review the document that confirms the acceptance of your placement by the employer.

**General Review**

This section typically contains:

- A general statement or review provided by your mentor or employer, endorsing your competencies and practical experience.

**Area of Competency**

Detailed activities and evaluations are listed here:

- **Area of competency**: Describes the specific skills or knowledge areas where you have gained experience.
- **How the trainee was involved in the Competency**: Outlines the tasks or responsibilities you had.
- **Mentor's validation of explanation**: Indicates whether the mentor confirms the accuracy of your involvement and experience.
- **Mentor's ranking of the GA**: Reflects the mentor's assessment of your performance on a scale, often from 1 (lowest) to 5 (highest).

**Functional Buttons**

- **Download Employer Form**: Downloads a form for your employer to fill out regarding your placement.
- **Print Logbook**: Prints out a copy of your logbook activities for your records.
- **Submit Employer Recommendation**: Submits the recommendation form filled out by your employer.
- **Submit Employer Acceptance**: Submits the acceptance letter from your employer.

**Recording and Submitting Logbook Entries**

- **Entering Activities**: Input the details of your activities as per your practical experience in the provided fields or formats.
- **Mentor's Review**: Discuss your entries with your mentor and have them validate and rank your competencies as required.
- **Document Uploading**: Attach any necessary documents that support your logbook entries, such as signed forms or letters.

**Tips for Managing Your Logbook Activities**

- Keep your logbook entries detailed and reflective of your actual work to ensure they serve as an accurate record of your professional development.
- Maintain regular communication with your mentor for feedback and validation of your entries.
- Ensure that all employer and mentor documents are submitted on time and are correctly filled to avoid any discrepancies in your records.

## 5.3 Mentorship List

### Accessing Mentorship Details

To view and manage your mentorship records:

1. Navigate to the "Practical Experience" section on your main dashboard.
2. Click on the "Mentorship" tab to access your mentorship history.

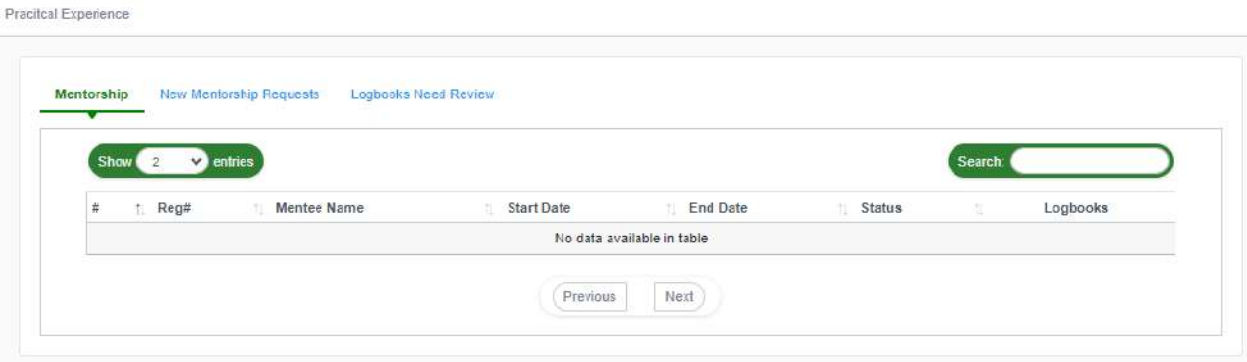



*Figure 22 Mentorship List*

### Overview of Mentorship List

- **Show Entries**: Use the dropdown menu to choose how many mentorship records to display at one time.
- **Search**: Use the search bar to filter through your mentorship records by details such as mentor name or registration number.

### Mentorship Table

- **No data available in table**: Indicates that there are currently no mentorship records to display. If you have been in a mentorship, you may need to add the records or refresh the page.

### Table Columns

- **#**: A sequential number for the mentorship entries.
- **Reg#**: The registration number associated with the mentorship.
- **Mentee Name**: Your name or the name of the individual being mentored.
- **Start Date**: The beginning date of the mentorship.
- **End Date**: The date when the mentorship ended or is projected to end.
- **Status**: The current status of the mentorship (e.g., Active, Completed, Pending).
- **Logbooks**: A column indicating if there are any logbooks linked to the mentorship.

**Adding Mentorship Records**

- If your mentorship records are missing:
    - Look for an "Add New" or similar button to input new mentorship details.
    - Enter all relevant information including the mentor's details, the period of mentorship, and any associated logbook activities.

**Actions in Mentorship Section**

- **View/Edit**: Use the edit icon (often a pencil symbol) to update details or view more information about the mentorship.
- **Delete**: Click the trash bin icon to remove a mentorship record. Be cautious as this may permanently delete the record.

**Pagination**

- If you have more records than displayed on one page, use the "Previous" and "Next" buttons to navigate between pages.

**Tips for Managing Your Mentorship Records**

- Regularly update your mentorship records to reflect ongoing or completed experiences accurately.
- Keep all related documents, such as mentorship agreements and logbooks, in a safe place for future reference.

### 5.3.1 New Mentorship Requests List

**Accessing New Mentorship Requests**

For individuals looking to review or manage incoming mentorship requests:

1. Go to the "Practical Experience" section on your profile's main interface.
2. Click on the "New Mentorship Requests" tab to view pending requests for mentorship.

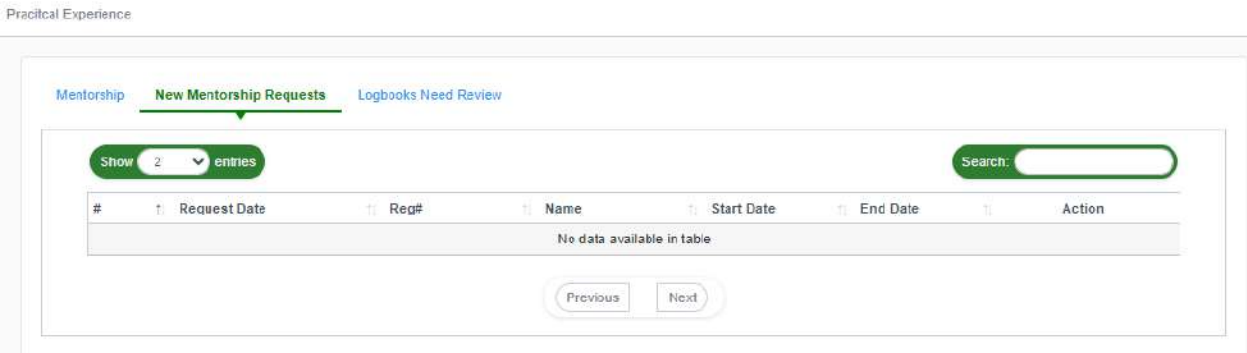



*Figure 23 New Mentorship Request*

**Navigating the New Mentorship Requests Interface**

- **Show Entries**: Select the number of requests you wish to view per page using the dropdown menu.
- **Search**: Employ the search bar to locate specific requests by details such as request date, name, or registration number.

**Mentorship Requests Table**

- **No data available in table**: Indicates there are no new mentorship requests at the moment. When requests are made, they will populate this table.

**Table Columns**

- **#**: The sequence number of the request entry.
- **Request Date**: The date when the mentorship request was made.
- **Reg#**: The registration number pertaining to the mentorship request.
- **Name**: The name of the individual requesting mentorship.
- **Start Date**: The proposed starting date for the mentorship.
- **End Date**: The proposed ending date for the mentorship.
- **Action**: A placeholder for potential actions you can take on each request, such as approve or deny.

**Managing New Requests**

To handle a new mentorship request:

- If the table is empty, check back periodically for new entries.
- Once a request appears:
    - Review the details provided in each column.
    - Use the "Action" buttons to process the request, with options typically including "View Details", "Approve", or "Reject".

**Tips for Managing Mentorship Requests**

- Verify the details of the request thoroughly before making a decision to ensure the mentorship aligns with your areas of expertise and availability.
- Keep communication open with potential mentees to discuss expectations, goals, and responsibilities before accepting the mentorship.
- Document any agreements or plans discussed with the mentee for future reference.

## 5.3.2 User Manual Script for Logbooks Needing Review

**Accessing Logbooks for Review**

For mentors or individuals responsible for reviewing practical experience:

1. Navigate to the "Practical Experience" then “Mentorship” section in your main interface.
2. Select the "Logbooks Need Review" tab to display a list of logbooks awaiting your evaluation.

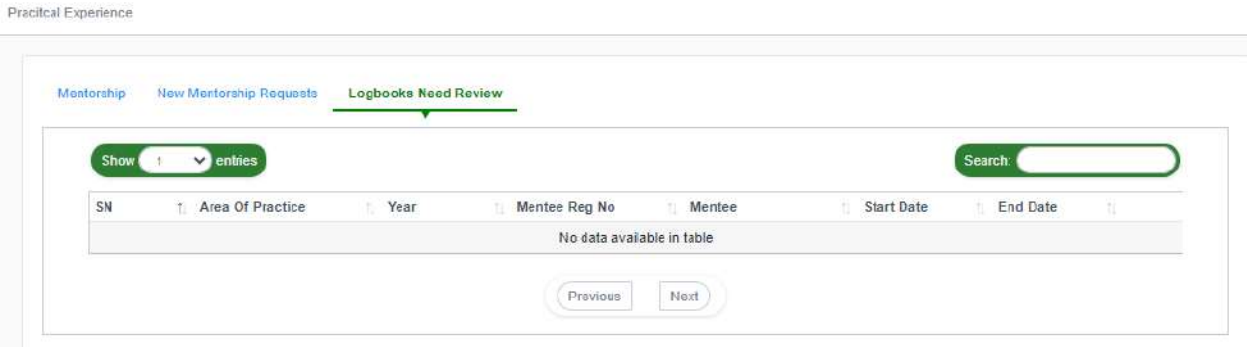



*Figure 24 Logbook that need Review*

**Overview of the Logbooks Needing Review Interface**

- **Show Entries**: Adjust how many entries are displayed at once using the dropdown menu.
- **Search**: Employ the search function to quickly locate specific logbooks by details such as mentee name, area of practice, or dates.

**Review Table**

- **No data available in table**: Indicates there are currently no logbook entries awaiting review. This area will populate with entries as they are submitted by mentees.

**Table Columns**

- **SN (Serial Number)**: Sequential number of the logbook entry.
- **Area Of Practice**: The professional field the logbook pertains to.
- **Year**: The year of the practical experience being logged.
- **Mentee Reg No**: Registration number of the mentee whose logbook needs review.
- **Mentee**: The name of the individual who has submitted the logbook.
- **Start Date**: The date when the logged experience began.
- **End Date**: The date when the logged experience ended.

**Actions for Logbook Review**

- **Action**: This column will have icons or links to view the details of the logbook and perform the review. The specific actions may include "View", "Approve", or "Provide Feedback".

**Managing Logbook Reviews**

- When a logbook entry is submitted for review:
    - Click on the action icon (such as an eye for "View") to read through the logbook details.
    - Check the activities logged, ensuring they meet the required standards and learning objectives.
    - Provide feedback or approval as appropriate within the system's functionality.

**Pagination**

- If there are multiple logbooks awaiting review that span several pages, use the "Previous" and "Next" navigation buttons to browse through the list.

**Tips for Conducting Logbook Reviews**

- Take the time to read each logbook entry thoroughly to provide constructive feedback.
- Be timely in your reviews to facilitate the mentee's progress and learning.
- Keep records of all reviews conducted, in case you need to reference them in the future.

# 6 CPD

## 6.1 Accessing CPD Requests

To view and manage your submitted CPD requests:

1. Navigate to the relevant section that handles CPD records.
2. Locate and select the "Submitted CPDs" tab to access the records of your CPD activities.

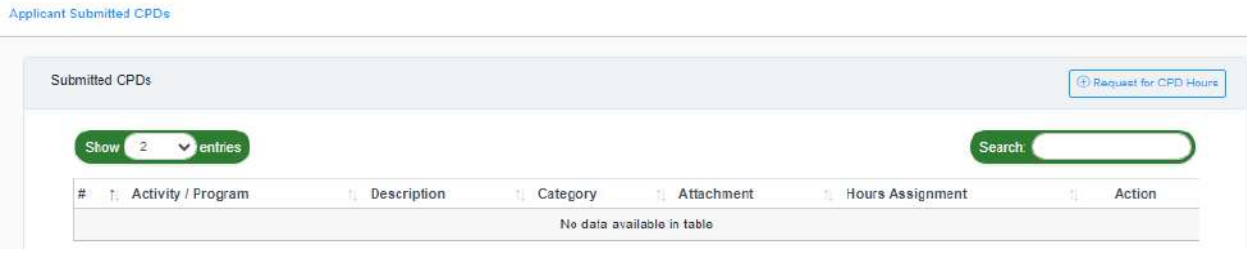



*Figure 25 Submitted CPD Requests*

**Understanding the Submitted CPD Requests Interface**

- **Show Entries**: Adjust the number of CPD requests shown on the page using the dropdown menu.

- **Search**: Employ the search bar to filter the CPD requests by activity, description, or any other column.

**CPD Requests Table**

- **No data available in table**: If this message is displayed, it means there are no CPD requests currently submitted or processed in the system.

**Table Columns**

- **#**: Sequential number for each CPD entry.
- **Activity/Program**: The name or title of the CPD activity or program.
- **Description**: A brief explanation of the CPD activity.
- **Category**: The classification or type of CPD activity.
- **Attachment**: If any supporting documents were submitted, they'll be indicated in this column.
- **Hours Assignment**: The number of CPD hours requested or assigned to the activity.
- **Action**: Placeholder for potential actions you can take, like editing or viewing more details.

**Actions for CPD Requests**

- **Request for CPD Hours**: Click this button to submit a new request for CPD hours.
- If there are entries in the list:
    - Review the details of each submission by clicking on the corresponding action button, which may be "View" or "Edit".
    - Use the "Attachment" link to view or download supporting documents if necessary.

**Managing and Adding CPD Requests**

- To add a new CPD activity request, click the "Request for CPD Hours" button.
- Fill in the necessary information regarding the CPD activity, ensuring that all required fields are completed.
- Attach any relevant documents that support your CPD claim.
- Submit the CPD request for review and approval.

**Pagination**

- If your CPD requests span across multiple pages, navigate using the "Previous" and "Next" buttons.

**Tips for CPD Requests**

- Keep detailed records and proof of all CPD activities to ensure smooth approval processes.

- Submit CPD requests in a timely manner, especially if there are deadlines associated with your professional licensing or certification.
- Regularly check the status of your CPD submissions to confirm their approval or to follow up on any required actions.

### 6.1.1 Requesting CPD Hours

**Initiating a CPD Hours Request**

To apply for Continuing Professional Development (CPD) hours for your activities:

1. **Open the Form**: Click the “Request for CPD Hours” button in the CPD section of your dashboard to open the submission form.

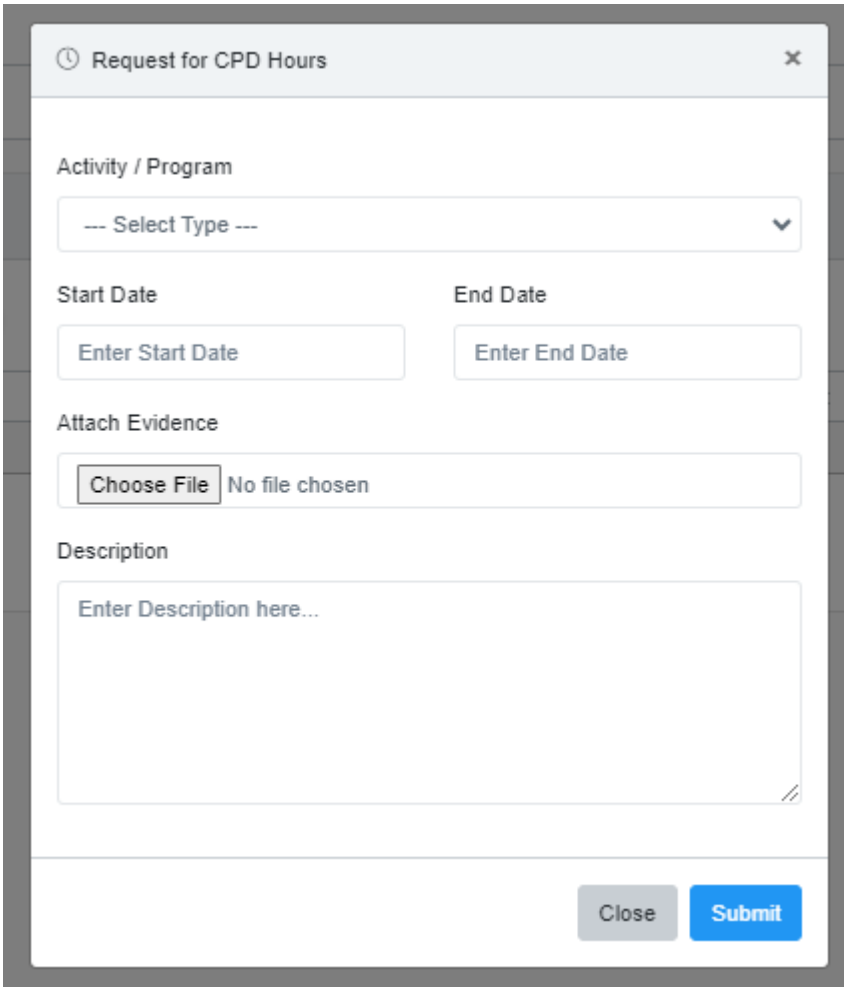



*Figure 26 CPD Hours Request*

**Filling Out the CPD Request Form**

2. **Activity/Program**:

- Click the dropdown menu labeled "Select Type" to choose the type of activity or program you are claiming CPD hours for.

3. **Start Date and End Date**:
    - Enter the start date of the activity in the "Start Date" field.
    - Enter the completion date in the "End Date" field.
4. **Attach Evidence**:
    - Click on "Choose File" to upload any documents that serve as evidence of your participation and completion of the CPD activity.
    - Accepted evidence may include certificates of attendance, completion, or other relevant documents.
5. **Description**:
    - In the "Description" text box, provide a brief but comprehensive explanation of the activity, your involvement, and how it contributes to your professional development.

**Submitting the CPD Request**

6. **Review**:
    - Before submitting, ensure all the information entered is accurate and the evidence attached correctly reflects the CPD activity.
7. **Submit**:
    - Once you are ready to proceed, click the "Submit" button to send your CPD hours request for review and approval.
8. **Close**:
    - If you need to exit without submitting, simply click the "Close" button.

**Tips for Submitting a CPD Request**

- Ensure the evidence is clearly legible and accurately reflects the activity for which you are claiming CPD hours.
- Be concise yet detailed in your description to provide clarity on the relevance of the activity to your professional growth.
- Keep a copy of all submissions and evidence for your records.

## 6.1.2 CPD Hours Assignments

### Accessing Your CPD Hours Assignments

To monitor and manage your CPD hours:

1. **Navigate to the CPD Section**: From your dashboard, locate and click on the “CPD Hours Assignments” link or tab to open your CPD hours summary and detailed list.

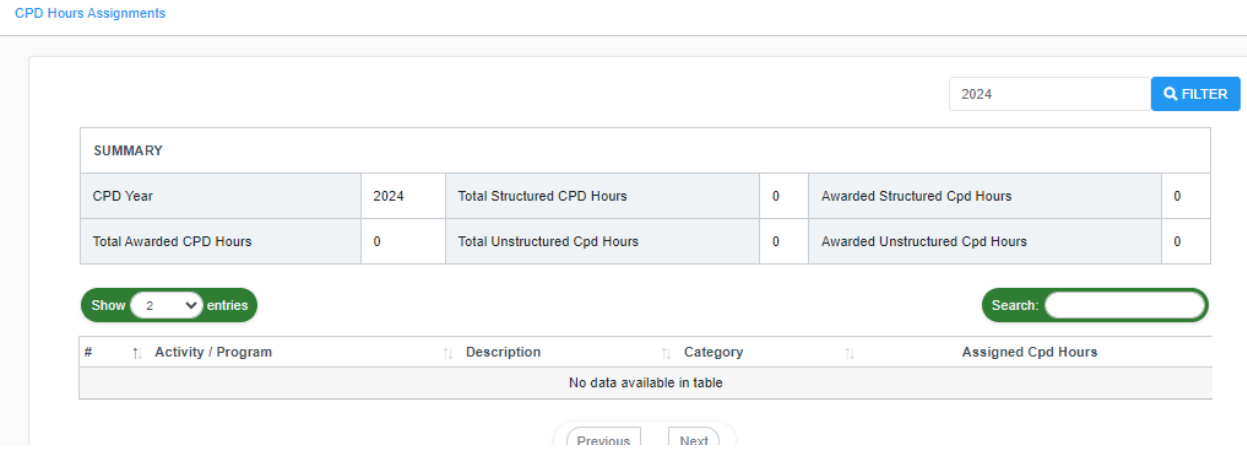



*Figure 27 CPD Hours Assignments*

### Understanding the CPD Hours Summary

- **CPD Year**: Select the year for which you want to view CPD hours from the dropdown or list.
- **Total Structured/Unstructured CPD Hours**: View the total CPD hours assigned to you, categorized as either structured or unstructured.
- **Total Awarded CPD Hours**: Review the cumulative CPD hours awarded for the selected year.

### Utilizing Filters

- **Filter**: Use the filter option to refine the CPD hours displayed based on specific criteria such as the year.

### Viewing Assigned CPD Activities

- **Show Entries**: Choose how many entries to display on the screen at once from the dropdown menu.
- **Search**: Utilize the search box to quickly find specific CPD activities or hours by keywords in the Activity/Program or Description columns.

### CPD Activities Table

- **No data available in table**: If this message shows, it means there are no CPD hours currently assigned to you for the selected period.

**Table Columns**

- **#**: A sequential identifier for each CPD activity entry.
- **Activity/Program**: The name or title of the CPD activity for which hours have been assigned.
- **Description**: A brief summary of the CPD activity.
- **Category**: The classification of the CPD activity.
- **Assigned CPD Hours**: The number of CPD hours that have been allocated to the specific activity.

**Managing CPD Activities**

- **Action**: Although not visible in the provided image, there is often an "Action" column where you might be able to view more details, edit, or confirm the assigned hours for each activity.

**Pagination**

- If there are more CPD activities than can be displayed on a single page, use the "Previous" and "Next" buttons to navigate through your CPD history.

**Tips for Managing CPD Hours**

- Regularly check this section to ensure your CPD hours are accurately recorded and up-to-date.
- If you notice any discrepancies, contact your CPD hours administrator or relevant department to rectify them.
- Keep personal records of all CPD activities and evidence of participation for your professional portfolio.

### 6.1.3 Candidacy Registration List

**Accessing the Candidacy Registrations**

For individuals who need to manage their applications for professional qualifications:

1. **Enter the Candidacy Registration Section**: Navigate to the “Candidacy Registration” area from your dashboard or menu options.

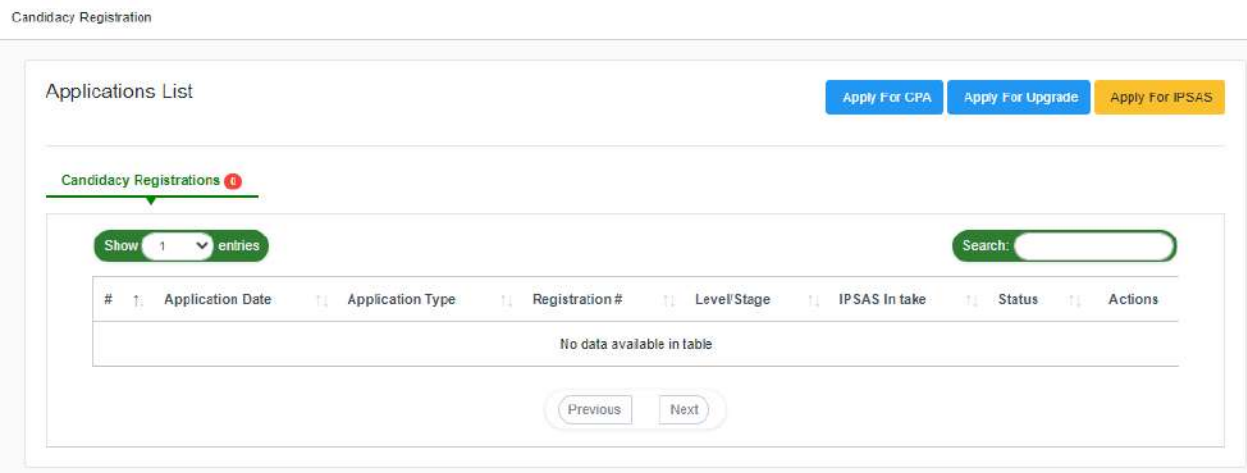



*Figure 28 Candidacy Registration List*

**Understanding the Candidacy Registrations Interface**

- The screen displays a list of all the applications you've submitted, including those for CPA, other upgrades, or IPSAS qualifications.

**Application List**

- **Show Entries**: Use the dropdown to choose how many applications to display per page.
- **Search**: Use the search bar to filter the displayed applications by specific details, such as application type or registration number.

**Applications Table**

- **No data available in table**: Indicates there are currently no applications or registrations recorded. If expected applications are missing, you may need to submit a new application or refresh the page.

**Table Columns**

- **#**: The serial number of the application.
- **Application Date**: The date you submitted the application.
- **Application Type**: The type of application submitted (e.g., CPA, upgrade, etc.).
- **Registration #**: The unique identifier for the application.
- **Level/Stage**: The level or stage of the qualification applied for.
- **IPSAS In take**: Specific to IPSAS applications, indicating the batch or intake.
- **Status**: The current status of the application (e.g., Pending, Approved, Rejected).

**Submitting a New Application**

- **Apply For CPA/Upgrade/IPSAS**: Click the corresponding button to start a new application process.

**Managing Applications**

- **Action**: Although not visible in the provided image, this section usually includes actions you can take, such as view more details, edit, or delete an application.

**Tips for Managing Candidacy Registrations**

- Review all applications regularly to stay updated on their status.
- Keep a personal record of all applications, including submission dates and application types.
- If you encounter any discrepancies or issues, contact the registration department or helpdesk for assistance.

# 7 CPA Candidacy Registration

**Initiating the CPA Candidacy Registration Process**

To apply for the CPA examination:

1. **Access the Form**: Click on the "CPA Candidacy Registration Form" from your dashboard or the appropriate section on your website.

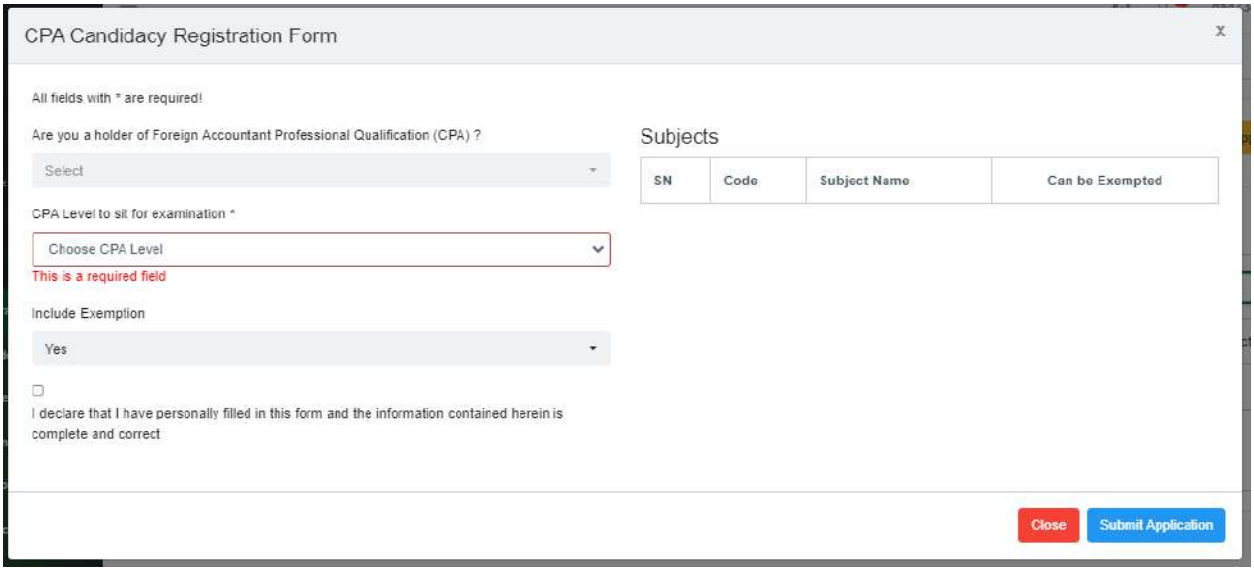



*Figure 29 CPA Candidacy Registration Form*

**Completing the Registration Form**

2. **Foreign Accountant Professional Qualification**:
    - Select from the dropdown whether you are a holder of a Foreign Accountant Professional Qualification (CPA).

3. **CPA Level for Examination**:
    - Click the dropdown menu labeled "Choose CPA Level" to select the appropriate CPA level you wish to sit for in the examination. This field is mandatory.
4. **Subject Registration**:
    - The form will likely list the subjects relevant to the chosen CPA level. Review these carefully.
    - If applicable, specify for which subjects you may seek exemption based on prior qualifications or experience.
5. **Include Exemption**:
    - If you are eligible for any exemptions from certain examination subjects, select "Yes" from the "Include Exemption" dropdown and provide the required evidence or information as instructed.

**Declaration and Consent**

6. **Declaration Checkbox**:
    - Before submitting the form, read the declaration statement carefully.
    - If you agree, and to the best of your knowledge the information provided is complete and correct, click the checkbox to confirm your declaration.

**Submitting the Application**

7. **Review Your Information**:
    - Double-check all entered information for accuracy. Ensure that all required fields (*) are filled in.
8. **Submit the Application**:
    - Once you have reviewed the form and are ready to proceed, click the "Submit Application" button to send your CPA candidacy registration for processing.
9. **Close the Form**:
    - If you need to exit without submitting, select the "Close" button. Remember that this will not save the entered information, and you will need to fill in the form again when you return.

**Tips for CPA Candidacy Registration**

- Ensure that you meet the eligibility criteria for the CPA examination level you are applying for.
- Gather all necessary documents, especially if applying for subject exemptions.
- Keep a copy of the confirmation or receipt of your application for your records.

## 7.1 Candidacy Upgrade Application

### Starting the Candidacy Upgrade Process

To apply for an upgrade in your professional candidacy level:

1. **Open the Upgrading Form**: Select the “Candidacy Upgrading Level Form” from the relevant section of your dashboard or menu.

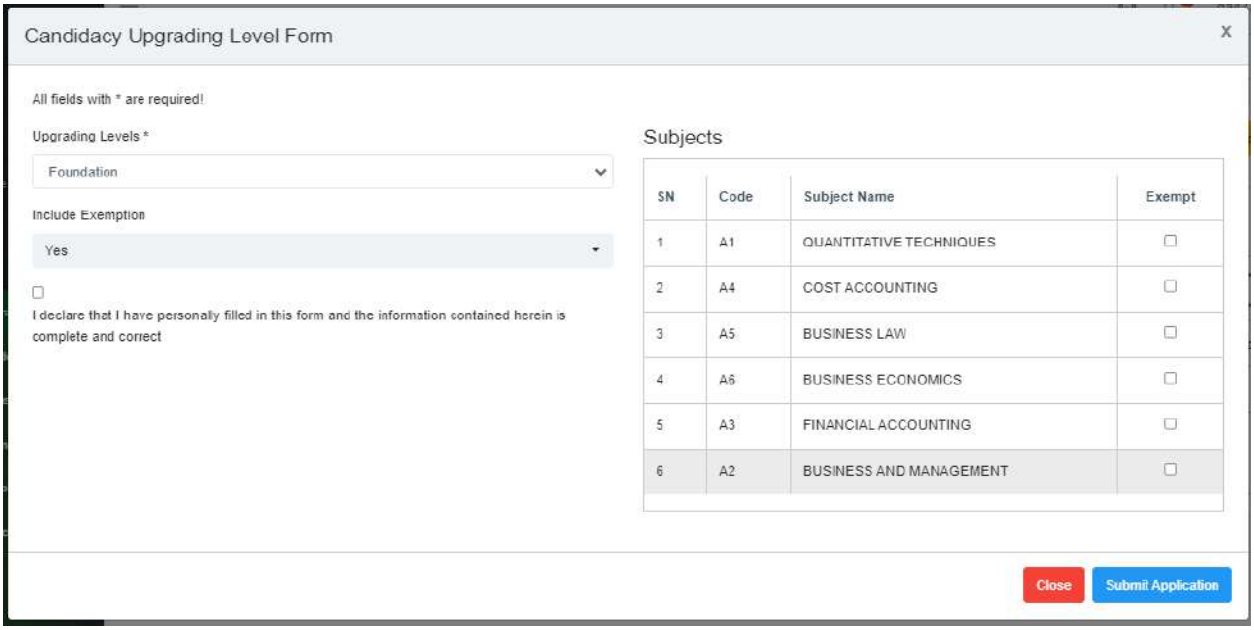



*Figure 30 Candidacy Upgrade*

### Filling Out the Upgrading Form

2. **Upgrading Levels**:
    - Click the dropdown menu labelled “Upgrading Levels” to select the level to which you are applying for an upgrade.
3. **Include Exemption**:
    - If you believe you qualify for exemptions in any subjects based on previous experience or qualifications, select “Yes” from the "Include Exemption" dropdown.
    - You will need to provide additional documentation to support your exemption claim.

**Subject List**

- Review the subjects listed that are pertinent to the chosen level of upgrading.
- For each subject you wish to claim an exemption, tick the corresponding "Exempt" checkbox.

**Confirming Your Information**

4. **Declaration**:
    - Read the declaration statement confirming that you have personally filled in the form and the information is accurate.
    - If you agree, click the checkbox to indicate your acknowledgment.

**Submitting the Upgrade Application**

5. **Review All Information**:
    - Double-check all selections, especially regarding the upgrading level and exemptions, to ensure they are correct.
    - Ensure that all required fields marked with an asterisk (*) are completed.
6. **Submit the Application**:
    - Click the “Submit Application” button to finalize and submit your candidacy upgrade application for processing.
7. **Close the Form**:
    - If you need to exit the form without submitting, click the “Close” button. Be aware that this may not save your entered data.

**Tips for a Successful Candidacy Upgrade Application**

- Be certain of the upgrade level you are eligible for before selecting it on the form.
- Prepare all documentation required for exemptions in advance and make sure they are ready to upload if the system prompts you to do so.
- Keep a record of the application submission date and a copy of any confirmation or receipt provided post-submission.

## 7.1.1 IPSAS Application

### Starting the IPSAS Application Process

For professionals seeking to apply for the International Public Sector Accounting Standards (IPSAS) qualification:

1. **Access the IPSAS Application Form**: Select the form from your dashboard or the specific section designated for IPSAS applications.

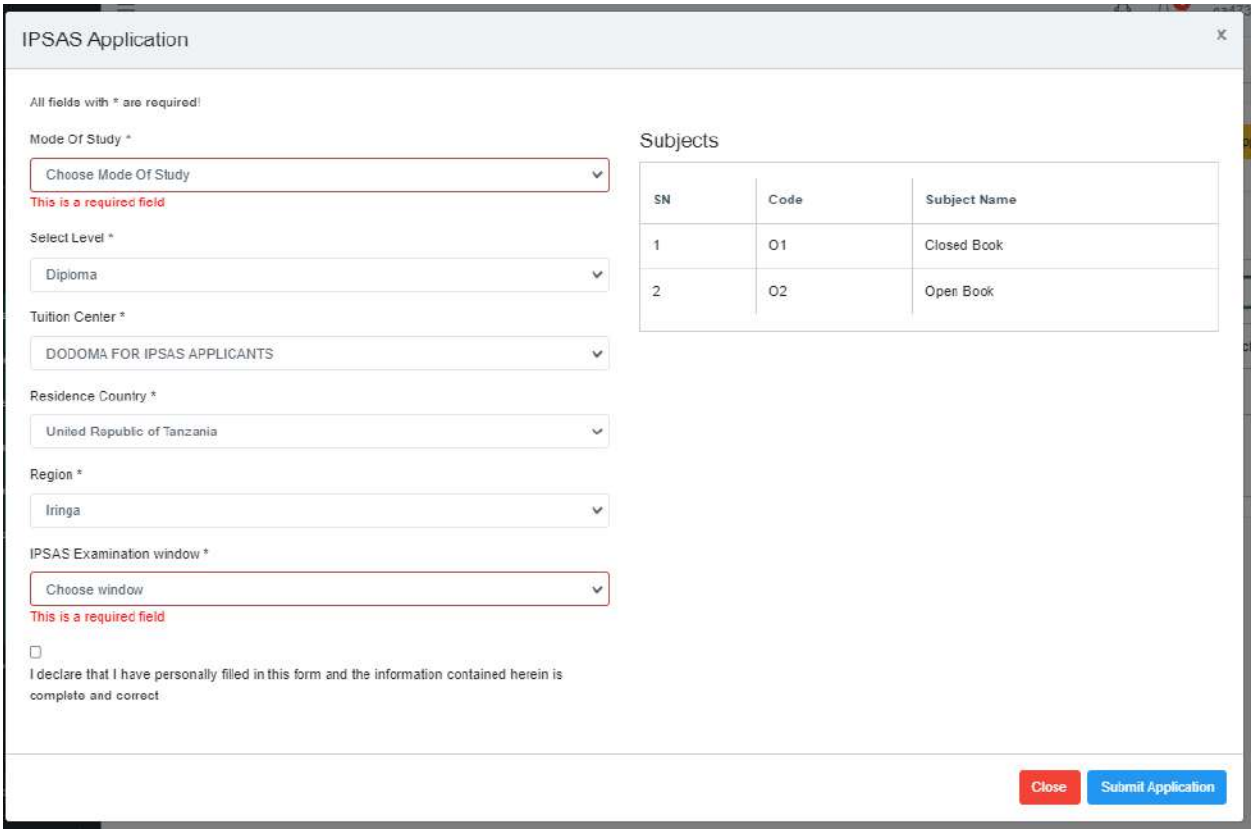



*Figure 31 IPSAS Application*

### Completing the Application Form

2. **Mode Of Study**:
    - Use the "Choose Mode Of Study" dropdown to select your preferred mode of study. This is a required field and may include options such as full-time, part-time, or distance learning.
3. **Select Level**:
    - Choose the appropriate qualification level for your IPSAS studies, such as "Diploma" or any other levels offered.
4. **Tuition Center**:

- Select your preferred tuition center from the dropdown list provided, which in this case includes options like "DODOMA FOR IPSAS APPLICANTS".

5. **Residence Country**:
    - Confirm your country of residence, which is preset to the "United Republic of Tanzania" in this form.
6. **Region**:
    - Choose your specific region from the dropdown, such as "Iringa" or other regions available in the form.
7. **IPSAS Examination Window**:
    - Select the examination window during which you intend to sit for the IPSAS examination.

**Subjects Selection**

- Review the subjects listed on the right side of the form, which may include exams or modules like "Closed Book" or "Open Book".

**Declaration and Submission**

8. **Declaration**:
    - Read and understand the declaration that confirms the personal completion of the form and the accuracy of the information.
    - If you agree, click on the declaration checkbox to mark your consent.
9. **Submit the Application**:
    - After verifying that all information is correct and complete, press the "Submit Application" button to finalize your IPSAS application.
10. **Close the Form**:

- If you decide not to submit at this time, click the “Close” button to exit the form. Be aware that this action may not save your entered data.

**Tips for a Smooth IPSAS Application**

- Before starting, ensure you have all necessary information, including details of your study mode, center, and subjects.
- Review each section carefully to avoid errors that could delay the processing of your application.
- Keep a record of the submission confirmation, as you may need to refer to it later.

## 7.2 My Examination Applications List

### Accessing Your Examination Applications

For candidates managing their examination applications:

1. **Locate the "My Applications" Section**: Navigate to the "My Examination Applications" area from your main dashboard or the exams-related menu.

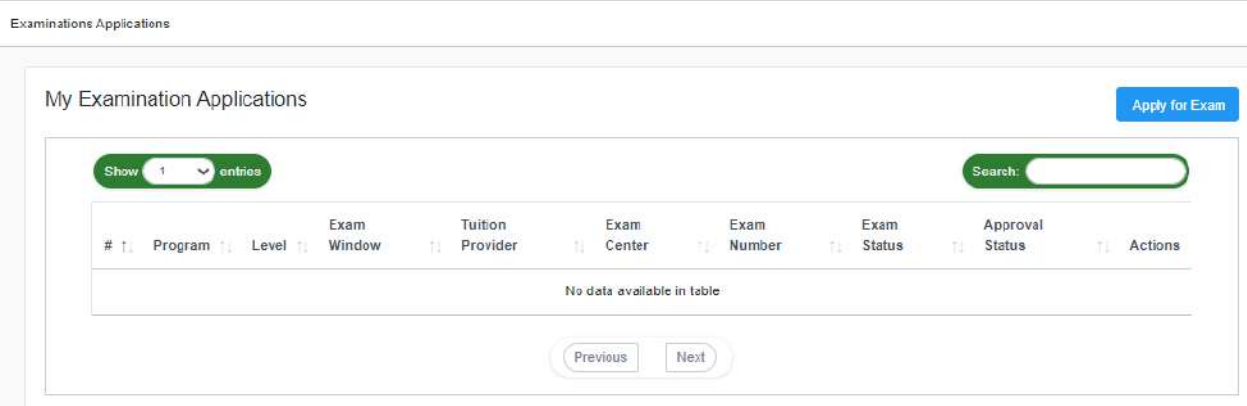



*Figure 32 My Exam Application*

### Understanding the Examination Applications Interface

- This section provides a summary of all your examination applications along with their statuses and any actions you may need to take.

### Examination Applications Table

- **Show Entries**: Adjust the dropdown to control the number of applications displayed on the page.
- **Search**: Use the search bar to quickly find specific applications by details such as program, level, or exam number.

### Table Columns

- **No data available in table**: This message indicates that there are currently no examination applications recorded in the system. If you have submitted applications that are not displaying, ensure that you are in the correct examination cycle or contact support.
- **#**: A sequential number assigned to your applications for easy reference.
- **Program**: The name of the program for which the examination is applied.
- **Level**: The level or stage of the program.
- **Exam Window**: The designated exam session for which you have applied.
- **Tuition Provider**: The institution providing tuition or preparatory courses.
- **Exam Center**: The location where you will take the examination.

- **Exam Number**: Your unique identifier for the examination.
- **Exam Status**: The current processing status of your examination application (e.g., Pending, Approved, Scheduled).
- **Approval Status**: The approval status of your application by the institution or board.

**Applying for Examinations**

- **Apply for Exam**: To add a new examination application, click the "Apply for Exam" button and complete the required steps in the subsequent form.

**Managing Applications**

- **Actions**: In this column, you would typically have options to view or edit your application details, check the status, or take other actions as provided by the system.

**Tips for Managing Examination Applications**

- Regularly check the status of your applications to stay informed about any updates or required actions.
- Keep records of all application details, including exam numbers and dates, for personal reference.
- In case of any discrepancies or issues, reach out to the exam support or helpdesk promptly.

## 7.3 Exam Application

**Initiating the Exam Application Process**

To register for an examination:

1. **Open the Exam Application Form**: Click the "Apply for Exam" button or link from the examinations section of your dashboard.

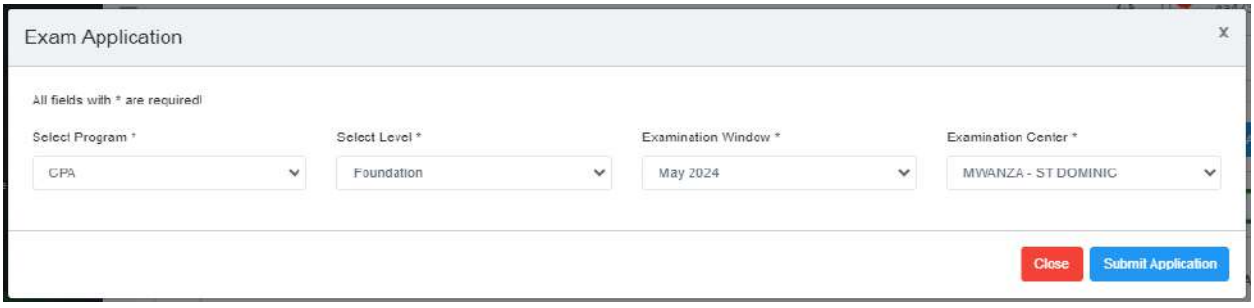



*Figure 33 Exam Application*

**Completing the Exam Application Form**

2. **Select Program**:

- From the "Select Program" dropdown, choose the program for which you are applying to take the exam, such as CPA.

3. **Select Level**:
    - Use the "Select Level" dropdown to choose the specific level of the program, like "Foundation," that you wish to register for.
4. **Examination Window**:
    - Click on the "Examination Window" dropdown to select the appropriate exam session, for instance, "May 2024."
5. **Examination Center**:
    - Use the "Examination Center" dropdown to select the location where you would like to sit the exam, such as "MWANZA - ST DOMINIC."

**Finalizing and Submitting Your Application**

6. **Review Your Selections**:
    - Double-check all the dropdown selections to ensure they accurately represent your desired exam registration details.
7. **Submit the Application**:
    - Once you are satisfied that all information is correct, click the "Submit Application" button to send your examination application for processing.
8. **Closing the Form**:
    - If you need to exit without submitting, select the "Close" button. Note that this will not save the information you have entered.

**Tips for a Successful Exam Application**

- Verify eligibility criteria for the selected exam level and window before applying.
- Be aware of registration deadlines to ensure your application is submitted in time.
- Keep a copy or take note of the application confirmation for future reference.

## 7.4 Postponed Exam List

**Accessing the Postponement List**

For candidates who need to review or manage their postponed exams:

1. **Enter the Postponement List Section**: Navigate to the “Examinations Postponement” tab on your dashboard or through the exam-related menu options.

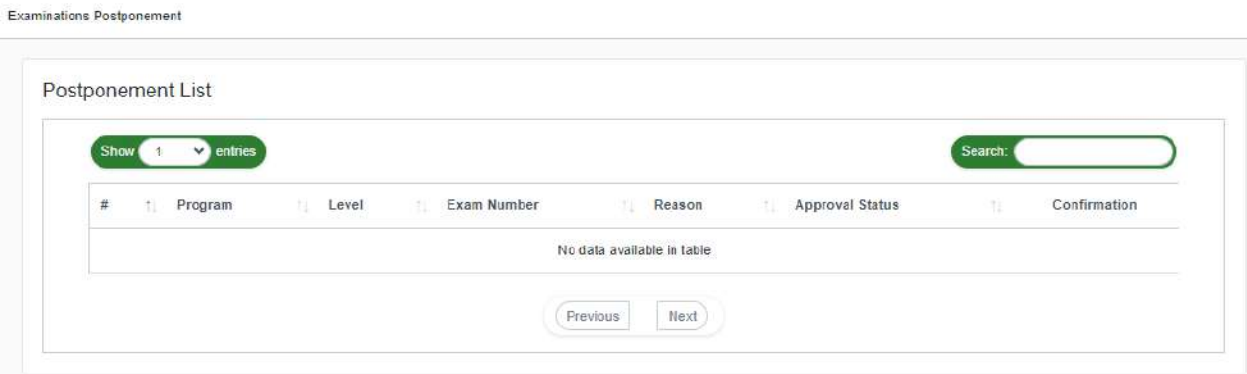



*Figure 34 Postponement List*

**Understanding the Postponement List Interface**

This section provides a summary of all your postponed examinations, along with their details and statuses.

**Interface Overview**

- **Show Entries**: Use the dropdown to select the number of entries you want to view on the page at one time.
- **Search**: The search bar allows you to filter the listed postponed exams by specific criteria such as program, level, or exam number.

**Postponement Table**

- **No data available in table**: If you see this message, it indicates there are no postponed exam records currently listed. If you have recently requested a postponement that is not showing, verify the status with the examination office.
- **Table Columns**:
    - **#**: The serial number of your postponement request.
    - **Program**: The program for which the exam was scheduled.
    - **Level**: The level of the program exam.
    - **Exam Number**: The unique identifier for the specific exam.
    - **Reason**: The reason provided for the postponement.
    - **Approval Status**: The current status of the postponement request (e.g., Pending, Approved, Denied).
    - **Confirmation**: Indicates whether confirmation of the postponement has been sent or acknowledged.

**Managing Postponed Exams**

- **Actions**: If available, you may have the option to view more details, edit, or cancel a postponement, or take other actions provided by the system.

**Tips for Managing Postponements**

- Regularly check the status of any postponement requests to stay informed about their approval and confirmation.
- Document all communication regarding exam postponements for your records.
- If your request is approved, make note of the new exam dates and prepare accordingly.
- Contact the examination office if you have questions about your postponement status or if you need to make changes to your request.

## 7.5 Examination Appeal Applications List

**Accessing Examination Appeal Applications**

For candidates who have applied for an examination appeal:

1. **Navigate to the Examination Appeal Section**: Use the navigation menu on your dashboard or the specified exams area to locate the "Examination Appeal Applications" section.

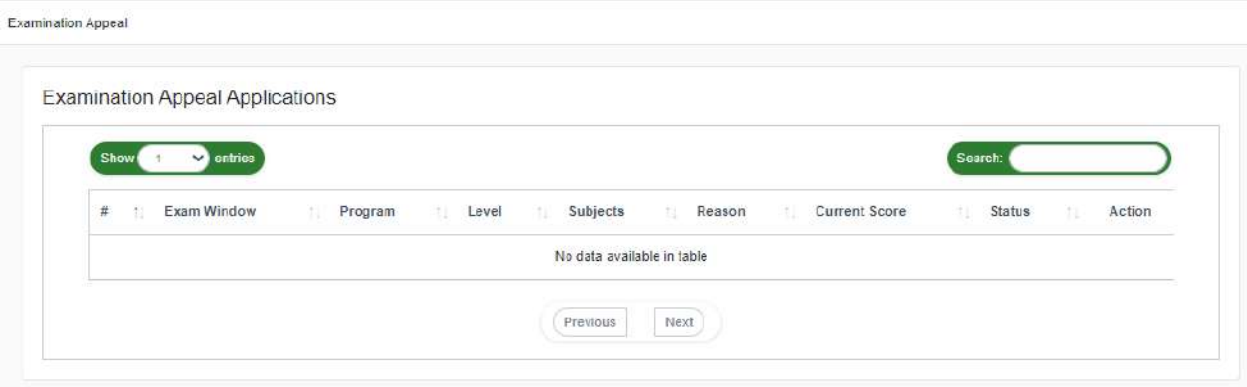



*Figure 35 Examination Appeal Application*

**Understanding the Examination Appeal Applications Interface**

The appeal applications list provides you with an overview of all your submitted appeals.

**Interface Functions**

- **Show Entries**: Adjust the number of entries you want to view at one time by using the dropdown menu.
- **Search**: Employ the search function to locate specific appeal applications using details like exam window, program, or score.

**Examination Appeal Table Overview**

- **No Data Available**: This notice indicates there are no appeal application records present. If you have submitted an appeal that is not showing, confirm the submission or contact support.
- **Columns**:
    - **#**: Serial number assigned to your appeals for reference.
    - **Exam Window**: The examination session associated with the appeal.
    - **Program**: The specific program for which the exam was taken.
    - **Level**: The level or stage within the program.
    - **Subjects**: The subject(s) of the exam being appealed.
    - **Reason**: The rationale provided for the appeal.
    - **Current Score**: The score received that is being appealed.
    - **Status**: Indicates the current status of the appeal (e.g., Pending, Under Review, Resolved).
    - **Action**: Possible actions you can take, such as viewing details, editing, or following up on the appeal.

**Tips for Managing Exam Appeals**

- Regularly check the status of your appeal to see if any further information or action is required.
- Document all communication related to your appeals, including dates, correspondence, and decisions.
- If you need to add new information or make a correction, use the action buttons if available.

## 7.6 Membership Application List

**Accessing Membership Applications**

If you need to view or manage your membership applications:

1. **Navigate to the Membership Applications Section**: Access this area from your dashboard or the membership-related menu to view your submitted applications.

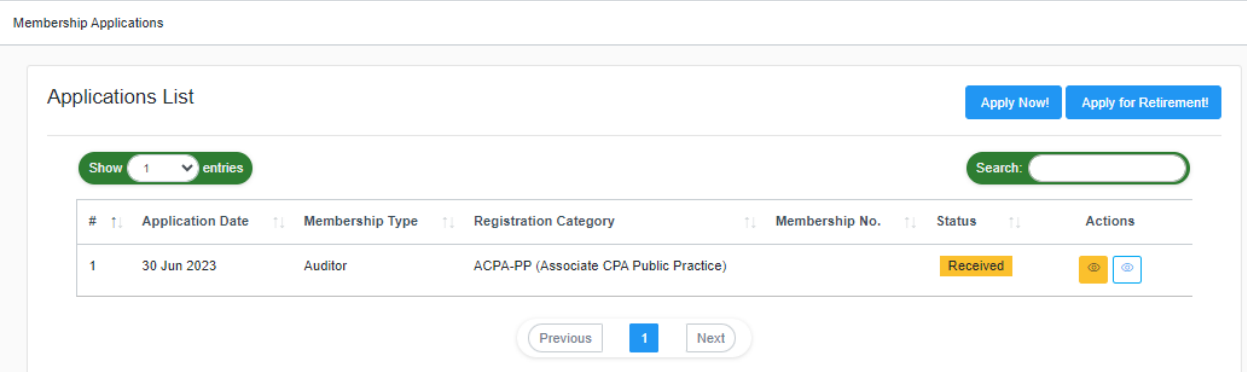



*Figure 36 Application Form*

**Understanding the Membership Application List Interface**

This interface provides a summary of all your membership applications and their current statuses.

**Application List Overview**

- **Show Entries**: Use the dropdown menu to control the number of applications displayed on one page.
- **Search**: Use the search box to quickly find specific applications by details like application date, membership type, or registration category.

**Applications List Table**

- **No Data Available in Table**: If this message is displayed, it means there are currently no membership application records in the system. If you have applied for membership and your application isn't showing, please verify the submission or contact member support.
- **Table Columns**:
    - **#**: The sequential number for your applications.
    - **Application Date**: The date when the application was submitted.
    - **Membership Type**: The type of membership applied for, such as "Auditor."
    - **Registration Category**: The category of registration within the membership, for example, "ACPA-PP (Associate CPA Public Practice)."
    - **Membership No.**: The number assigned to your membership, if applicable.
    - **Status**: The current status of your application, such as "Received."
    - **Actions**: If actions are available, icons will be present to view details, edit, or follow up on your application.

**Applying for Membership**

- **Apply Now**: To submit a new membership application, click the “Apply Now” button and complete the necessary steps in the form that appears.

- **Apply for Retirement**: If you wish to apply for retirement from your membership, select the "Apply for Retirement" button and proceed as instructed.

**Managing Your Applications**

- **Actions**: Utilize action buttons to manage your applications. You might have the option to review additional details, make edits, or take other steps as provided.

**Tips for Application Management**

- Regularly check the status of your applications to ensure they are being processed.
- Keep records of your application submissions, including dates and any confirmation numbers or emails received.
- If there is a change in your status or information, update your application promptly if allowed, or contact the membership office for assistance.

## 7.7 Membership Application

**Starting the Membership Application Process**

To apply for membership:

1. **Open the Membership Registration Form**: Click on the "Apply Now" or similar button on your dashboard or within the membership section.

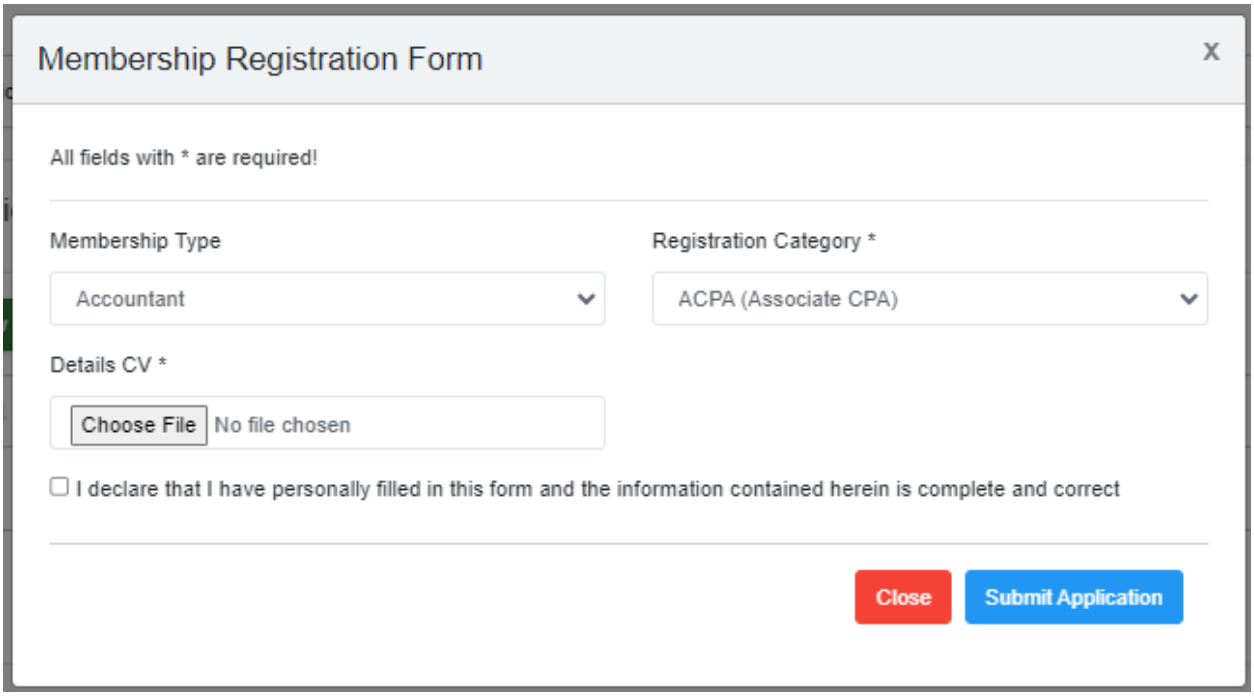



*Figure 37 Membership Application*

**Completing the Membership Registration Form**

The form is your first step towards becoming a registered member.

**Required Fields**

- **Membership Type**: Select the type of membership you are applying for from the dropdown menu. For example, "Accountant."
- **Registration Category**: Choose the appropriate category that applies to you, such as "ACPA (Associate CPA)."
- **Details CV**: Attach your Curriculum Vitae by clicking “Choose File.” Ensure that your CV is updated and formatted according to the provided guidelines.

**Declaration**

- Tick the checkbox to declare that the information you've provided is accurate and that you have personally completed the application form.

**Submitting Your Application**

Once you've filled out all required fields and attached your CV:

1. **Review Your Application**: Double-check all information for accuracy.
2. **Submit the Application**: Click on the "Submit Application" button to finalize your application process.

**After Submission**

- **Acknowledgment**: You should receive a confirmation notice or email indicating that your application has been received.
- **Follow-Up**: Save any confirmation numbers or emails for your records and follow up if you do not receive a status update within the expected timeframe.

**Closing the Form**

- If you need to exit without submitting, click the “Close” button. Be aware that unsaved information will not be retained.

## 7.7.1 Membership Retirement Application

**Accessing the Retirement Application Form**

For members considering retirement from their professional status:

1. **Open the Membership Retirement Form**: This can typically be accessed from the membership dashboard or the relevant section for member services.

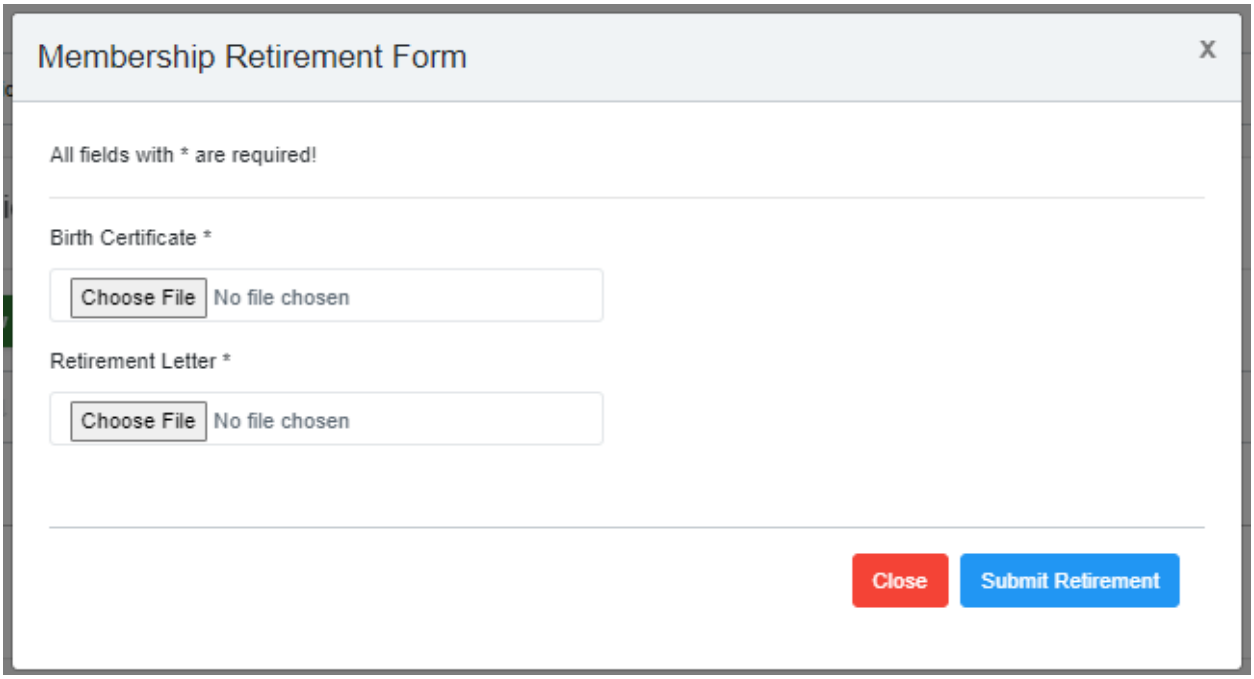



*Figure 38 Retirement Request Form*

**Filling Out the Retirement Form**

This form is designed to initiate the process of retiring your professional membership.

**Required Documentation**

- **Birth Certificate**: Click on the “Choose File” button to upload a scanned copy of your birth certificate. Ensure the file is clear and legible.
- **Retirement Letter**: Upload a scanned copy of your signed retirement letter by clicking the “Choose File” button. This document should state your intention to retire and include any relevant details such as your retirement date.

**Completing the Form**

- **Review Your Attachments**: Make sure the uploaded files are the correct documents and clearly visible.
- **Required Fields**: All fields marked with an asterisk (*) must be completed before submission.

**Submitting Your Retirement Application**

Once all information is verified:

1. **Submit the Retirement**: Click the "Submit Retirement" button to send your application for processing.
2. **Confirmation**: Look for an on-screen confirmation message or an email verifying receipt of your application.

**If You Need to Exit**

- **Saving**: Please note that closing the form without submitting may not save the entered data or uploaded files.
- **Close Button**: If you need to exit the form without submitting, click the “Close” button.

**After Submission**

- **Record Keeping**: Save any confirmation messages or emails for your records.
- **Follow-Up**: If you do not receive confirmation or if you have questions about the status of your application, contact member support for assistance.

## 7.8 Transcript Application

**Starting Your Transcript Application**

To request a transcript from your completed training programs:

1. **Access the Transcript Application Form**: Typically available in your academic or certification dashboard. Click on the “Request Transcript” or “Apply” button to open the application form.

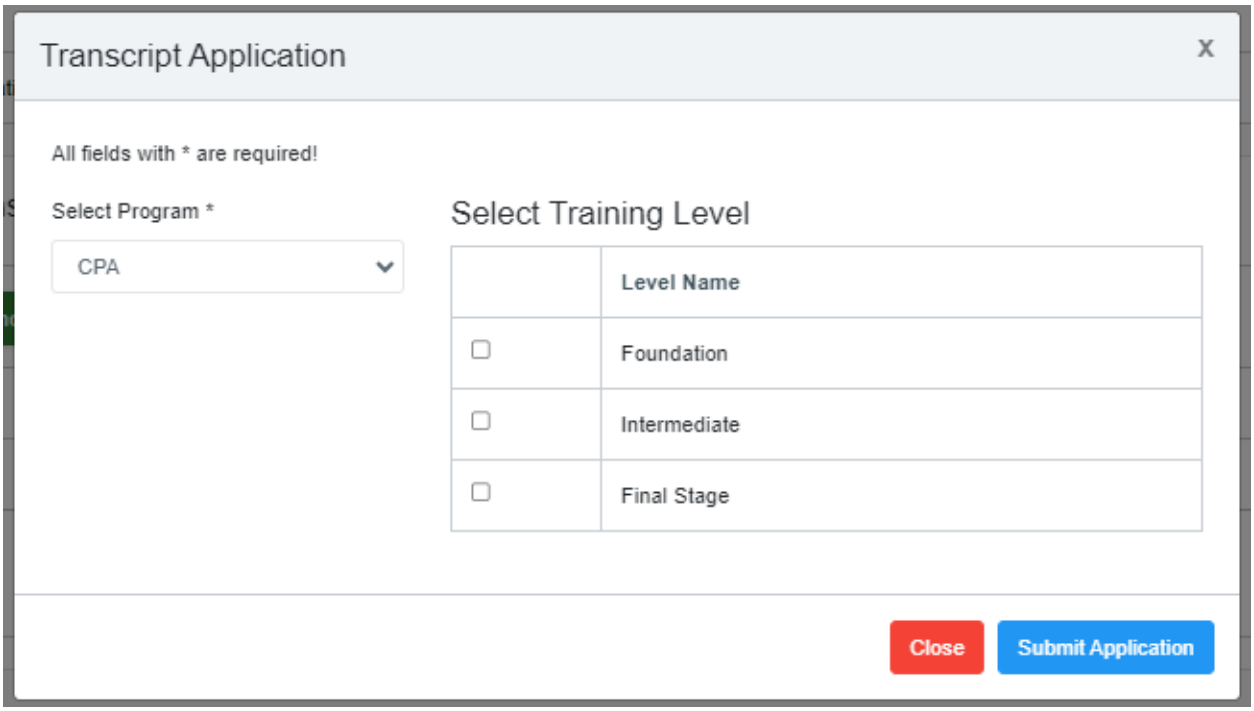



*Figure 39 Transcript Application*

**Completing the Transcript Application Form**

Please provide the necessary details to process your transcript request.

**Selecting the Program**

- **Select Program**: Choose the program for which you need the transcript, such as "CPA" from the dropdown menu.

**Choosing Training Level**

- **Select Training Level**: Mark the checkbox next to the level(s) of training for which you require transcripts.
    - Foundation
    - Intermediate
    - Final Stage

**Note**: You can select multiple levels if necessary.

**Submitting Your Application**

After selecting the relevant details:

1. **Review Your Selections**: Double-check the program and levels selected to ensure they are correct.
2. **Submit the Application**: Click the "Submit Application" button to proceed with your request.

**Closing the Application Form**

- If you decide not to submit the application or need to exit the form, click the “Close” button. Remember, any selections made will not be saved if you exit before submitting.

# 8 Change Request Application

For members who need to update their records, such as subscription details or mentor information, follow this guide to submit a new change request.

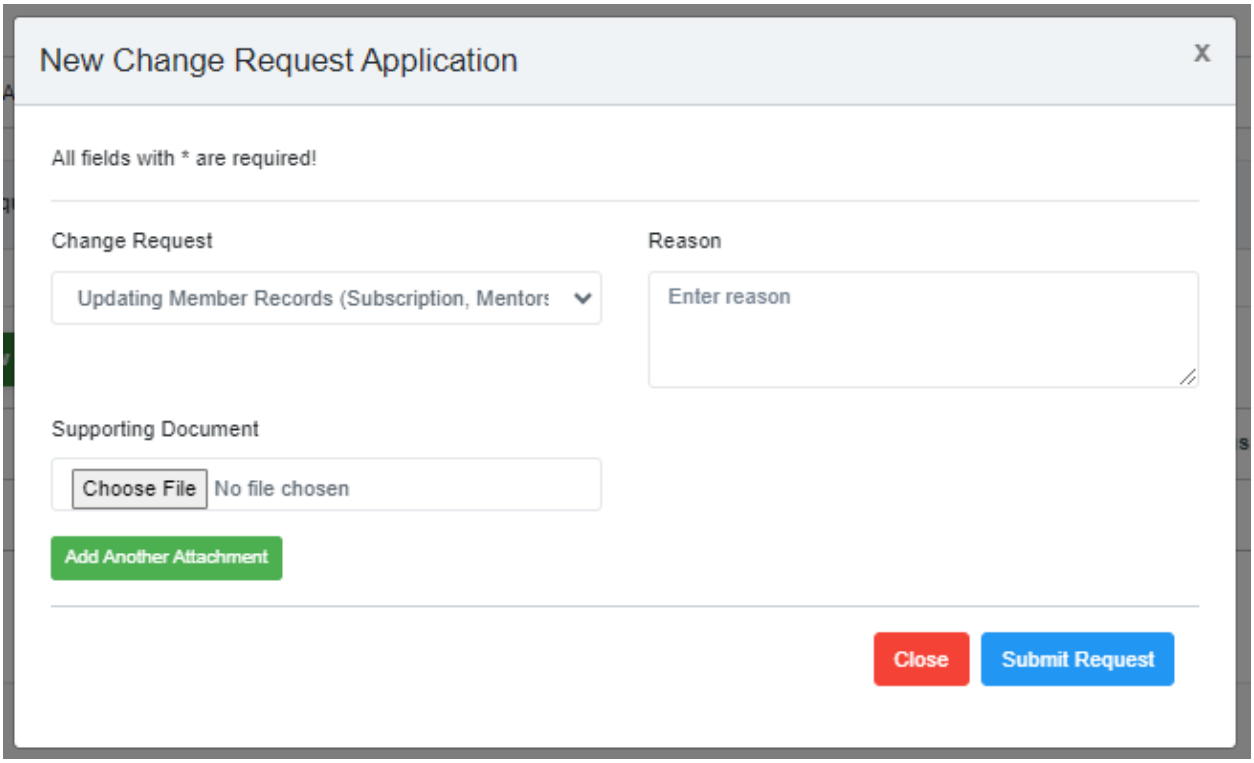



*Figure 40 Change Request Application*

**Steps for Change Request Submission**

1. **Access the Change Request Form**:
    - Locate and click on the section or link provided for change requests within your member dashboard or profile management area.
2. **Select Change Request Type**:
    - Use the 'Change Request' dropdown to select the type of update you need to make. For example, choose 'Updating Candidate Records, Updating Member Records (Subscription, Mentorship, Logbook) or Name Change or' if you need to update subscription details or mentor information.
3. **Specify the Reason for the Change**:
    - In the 'Reason' text box, clearly state why you are requesting the change. Be specific to avoid any delays in processing your request.
4. **Attach Supporting Document**:
    - Click 'Choose File' to attach any documents that support your change request. This could be a new subscription receipt, mentor agreement, or other relevant files.
    - If you need to attach multiple documents, click on 'Add Another Attachment' and repeat the process for each new file.

5. **Review Your Request**:
    - Before submitting, review all information and attached documents to ensure they are correct and complete.
6. **Submit the Request**:
    - Click the 'Submit Request' button to send your change request for processing.
7. **Confirmation**:
    - After submitting, wait for a confirmation notification. This may appear on the screen and/or be sent to you via email.
8. **Close the Form**:
    - If you wish to exit without submitting, press the 'Close' button. Remember, any unsaved information will not be submitted if you exit the form.

**Important Notes**

- Ensure all required fields marked with an asterisk (*) are filled in before attempting to submit the form.
- The processing time for change requests can vary. Please allow sufficient time for your request to be reviewed and actioned.
- Keep a copy of the confirmation notification for your records.

# 9 Viewing Member Certificates

This script will guide you through the process of viewing your list of certificates in the member portal.

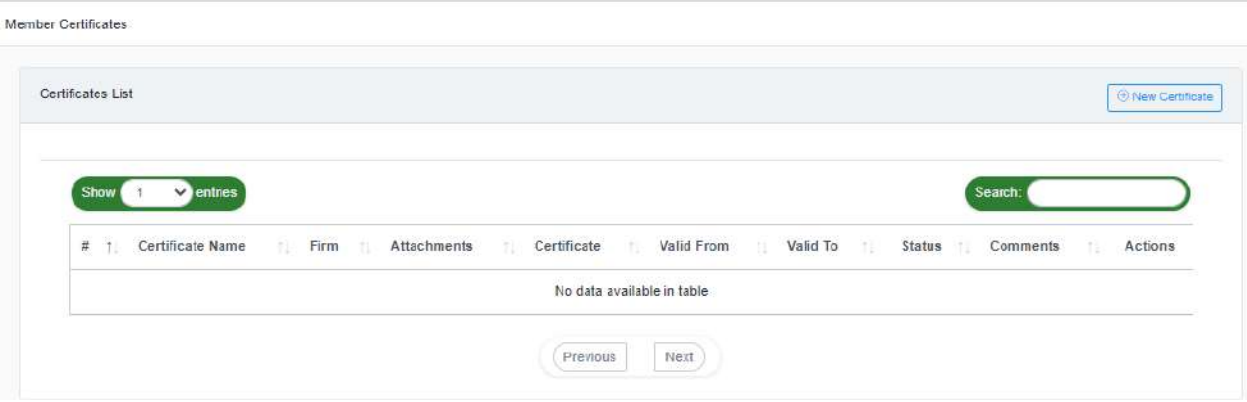



*Figure 41 Certificate List*

**Steps for Viewing Certificates**

1. **Accessing the Certificates List**

- Navigate to the 'Member Certificates' section of your dashboard.

2. **Reviewing the Certificates List**
    - Once in the 'Certificates List', you can view all certificates by selecting the number of entries you wish to see at a time from the 'Show' dropdown menu.
    - The list may be empty if no certificates have been added or if they are pending approval.
3. **Searching for a Specific Certificate**
    - Use the 'Search' box to quickly find a specific certificate by typing in the certificate name, firm name, or any other relevant keyword.
4. **Viewing Certificate Details**
    - For more detailed information on each certificate, or to download an attachment, click on the 'View' icon or link in the 'Actions' column corresponding to the certificate you wish to view.
5. **Navigating Through the List**
    - Use the 'Previous' and 'Next' buttons to navigate through multiple pages of certificates, if available.
6. **Refreshing the List**
    - If you believe new certificates should be displayed, refresh the page to update the list.

**Additional Notes**

- Ensure that your certificates are up to date, as expired certifications may affect your professional status.
- Keep an eye on the 'Valid From' and 'Valid To' dates to know when renewals are due.
- Use the 'Comments' section for additional information provided by the issuing body or notes for your reference.

## 9.1 Certificate Application Submission

This script provides instructions on how to apply for a membership certificate through the online application form.

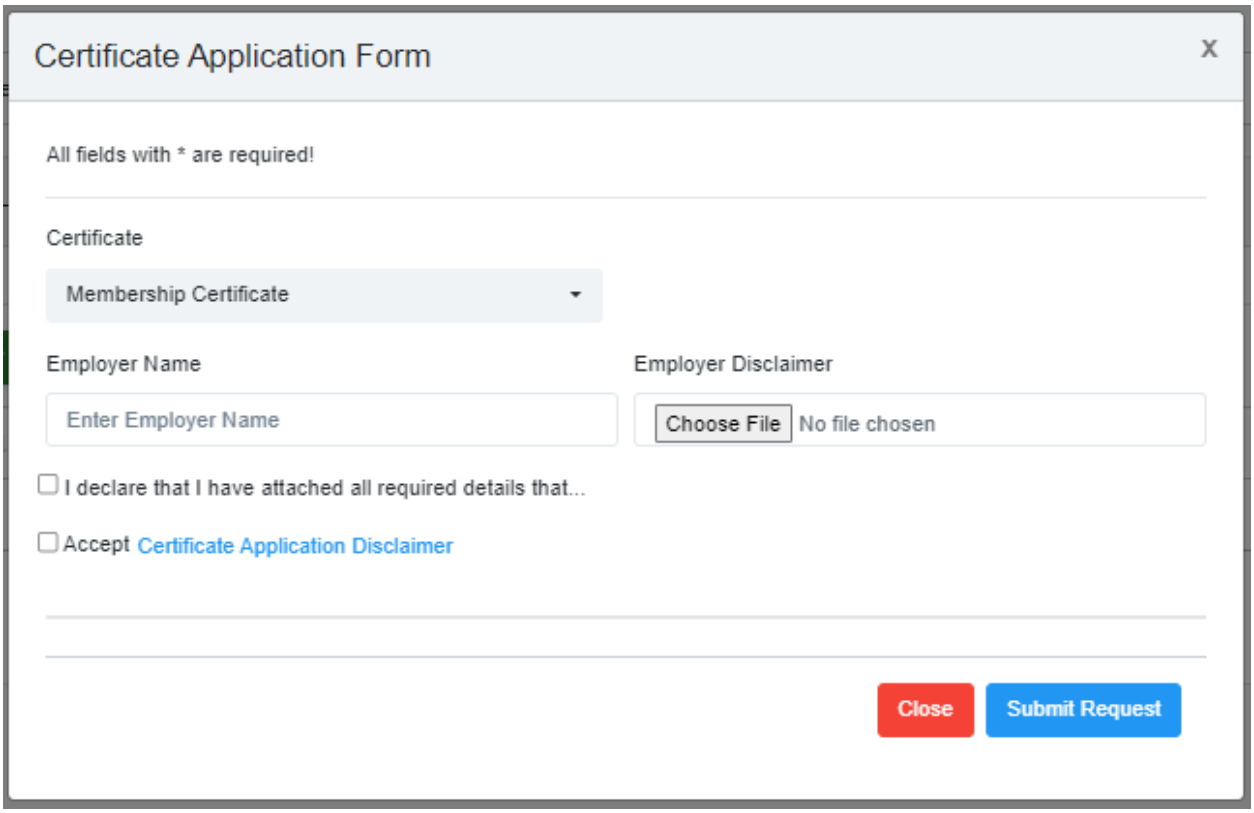



*Figure 42 Certificate Application*

**Certificate Application Submission**

**Steps for Certificate Application**

1. **Opening the Application Form**
    - Locate and click on the ‘Certificate Application Form’ from your dashboard or the relevant section of the website.
2. **Filling Out the Form**
    - Start by selecting the type of certificate you are applying for from the 'Certificate' dropdown menu. For example, choose 'Membership Certificate'.
    - Enter the name of your employer in the 'Employer Name' field.
3. **Uploading the Employer Disclaimer**
    - Click on the 'Choose File' button to upload the employer disclaimer document. Ensure that the file meets the required format and size specifications.
4. **Reading the Declarations**
    - Carefully read the declarations at the bottom of the form.

- If you agree to the declarations, tick the checkbox stating, “I declare that I have attached all required details that...”
- Next, tick the checkbox to “Accept Certificate Application Disclaimer”.

5. **Submitting the Application**
    - Once you have filled in all the required fields and attached the necessary documents, review your application to ensure all details are correct and complete.
    - Click on the ‘Submit Request’ button to send your application for processing.

**Additional Notes**

- Double-check for any required fields or documents you may have missed. Incomplete applications may result in delays or rejection.
- Ensure the employer disclaimer is signed and dated as required.

# 10 Tuition Providers List

This guide will help you navigate and utilize the Tuition Providers List to find and contact registered tuition providers.

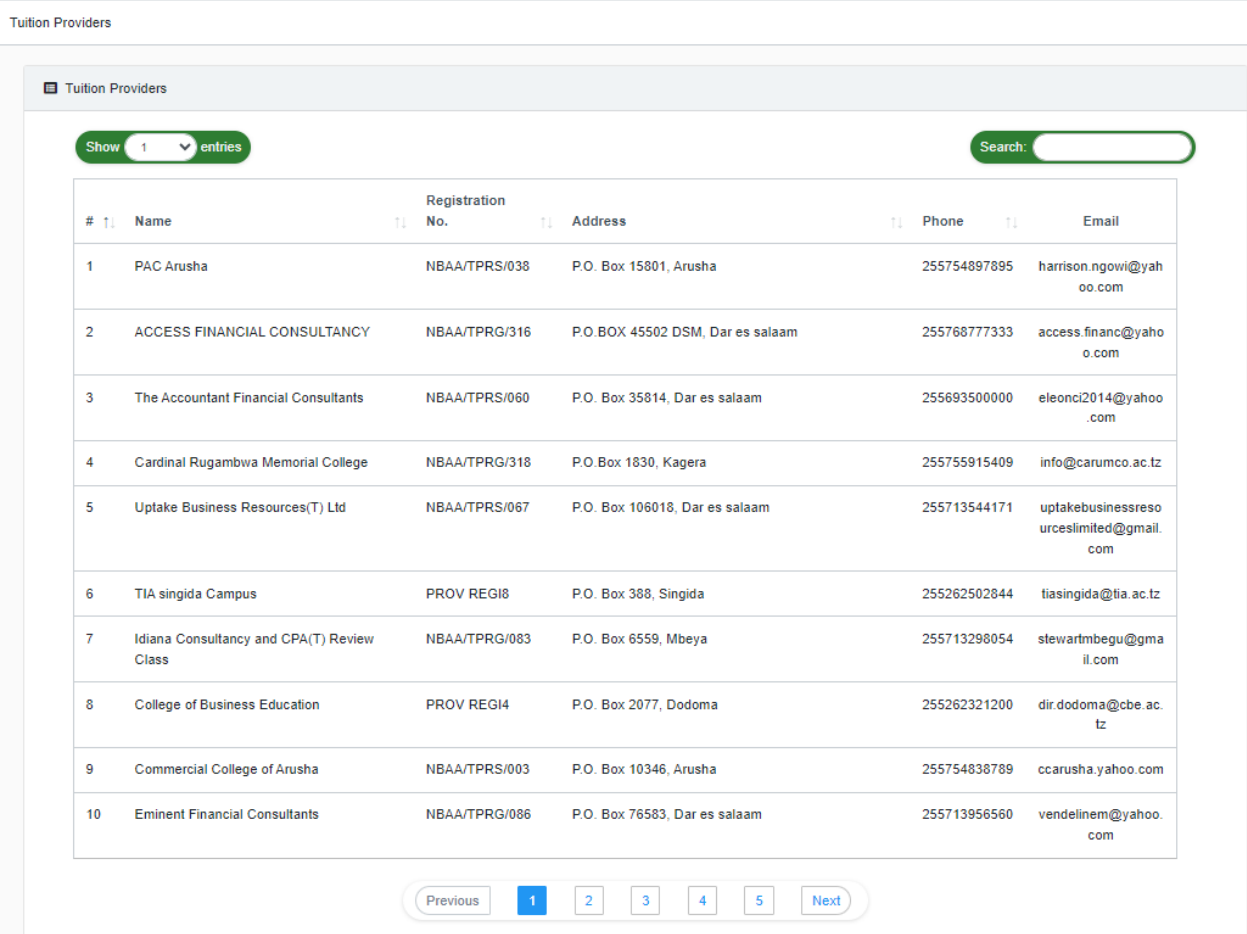



*Figure 43 Tuition Providers*

**Steps to Use the Tuition Providers List**

1. **Accessing the List**
    - Open the section titled ‘Tuition Providers’ from your dashboard or the main menu of the website.
2. **Understanding the List**
    - The list displays registered tuition providers with their details, including name, registration number, address, phone number, and email.
3. **Navigating the List**
    - Use the ‘Show’ dropdown menu at the top left of the list to select the number of entries you wish to view per page.
    - Navigate through the pages using the ‘Previous’ and ‘Next’ buttons, or select a specific page number at the bottom of the list.
4. **Searching for a Provider**

- Utilize the ‘Search’ bar on the top right to quickly find a specific provider by name, registration number, or other details.

5. **Contacting a Provider**
    - Once you have found a tuition provider of interest, use the phone number or email provided in the list to make contact.
    - It's advisable to verify the information before reaching out.
6. **Getting More Information**
    - For providers with additional information or attachments, look for links or icons indicating further details and click on them as needed.
7. **Updating Provider Information**
    - If you are responsible for a tuition provider and need to update information, contact the website administrators using the provided support or contact link.

**Additional Notes**

- The list may be updated regularly, so check back frequently for the most current information.
- If you encounter any issues or inaccuracies with the information, report them to the website's support team for correction.

## 11 Examination Timetable

Welcome to the examination timetable section. This guide will assist you in viewing the schedule for your upcoming exams.

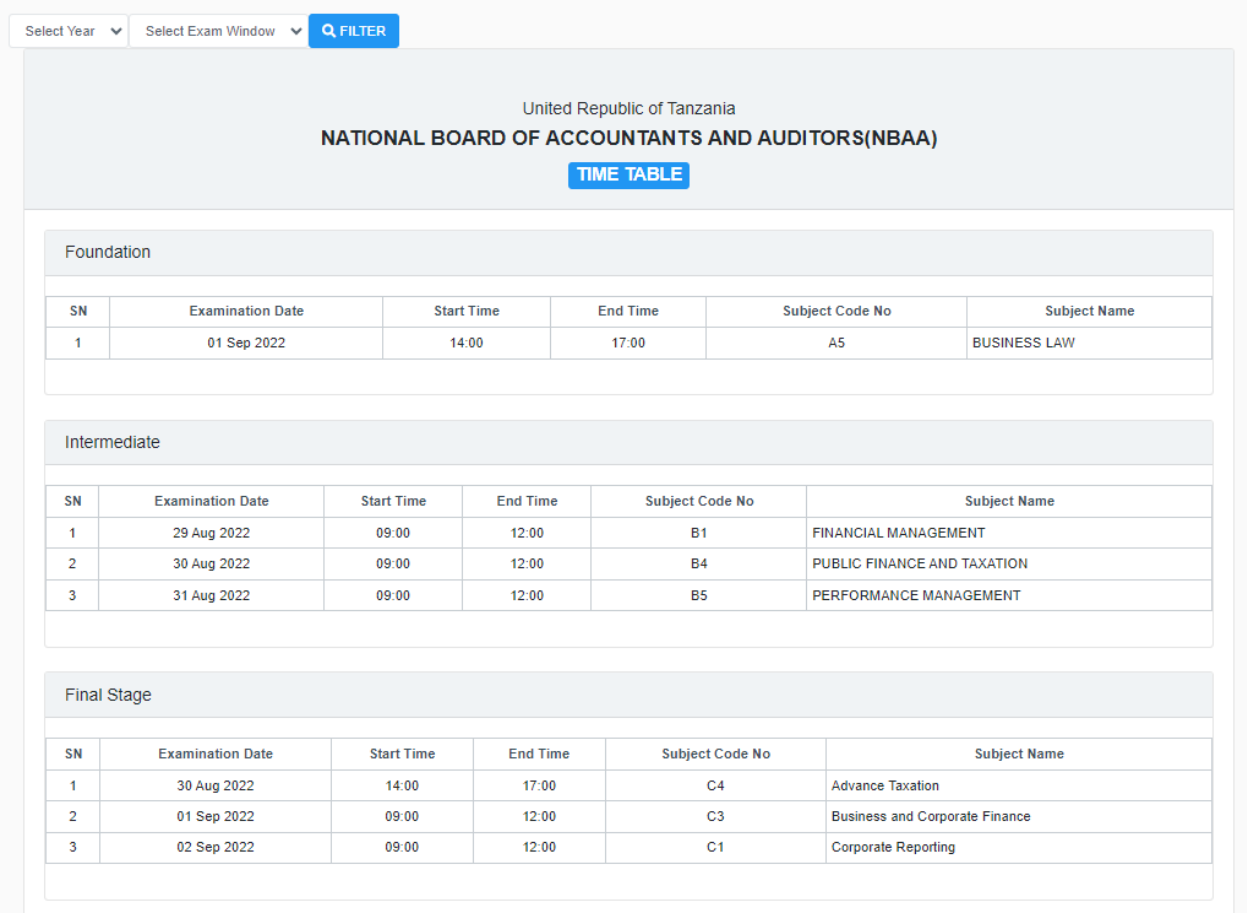



*Figure 44 Time Table*

**Viewing the Examination Timetable**

1. **Accessing the Timetable**
    - Navigate to the 'Examination Timetable' section on the main dashboard or from the examinations menu.
2. **Filtering the Timetable**
    - Use the 'Select Year' and 'Select Exam Window' dropdown menus to filter the timetable according to the examination year and session.
    - Click the 'FILTER' button to update the timetable with your selections.
3. **Understanding the Timetable Layout**
    - The timetable is divided into sections by the level of examination, such as Foundation, Intermediate, and Final Stage.
    - Each section lists the exams with details including Serial Number (SN), Examination Date, Start Time, End Time, Subject Code No, and Subject Name.
4. **Planning for the Exams**

- Note the dates and times for each subject you are scheduled to take.
- Arrange your study schedule accordingly and set reminders for the examination dates.

5. **Additional Information**
    - For any queries or if you need further assistance regarding the examination timetable, please contact the administration office or use the help feature on the website.

**Special Notes**

- Always double-check the timetable a few days before the exam to ensure there are no changes.
- Ensure that you have all necessary permissions and requirements completed before the exam dates.

## 12 Navigating and Using the 'Events' Section

The 'Events' section of our platform provides a centralized location for information on all upcoming events relevant to our members.

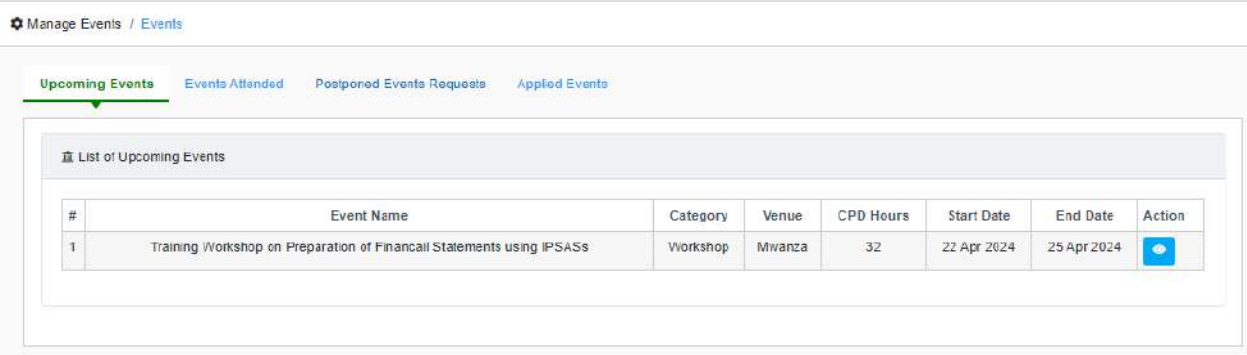



*Figure 45 Upcoming Events*

**Steps to Follow**

1. **Accessing Events**
    - Log in to your account and navigate to the 'Manage Events' section on the dashboard.
    - Click on the 'Upcoming Events' tab to view a list of scheduled activities and workshops.
2. **Reviewing Event Details**
    - Review the list of upcoming events which displays the Event Name, Category, Venue, CPD (Continued Professional Development) Hours, Start Date, and End Date.
    - Pay special attention to the CPD Hours to understand how much credit you will receive for attending the event.

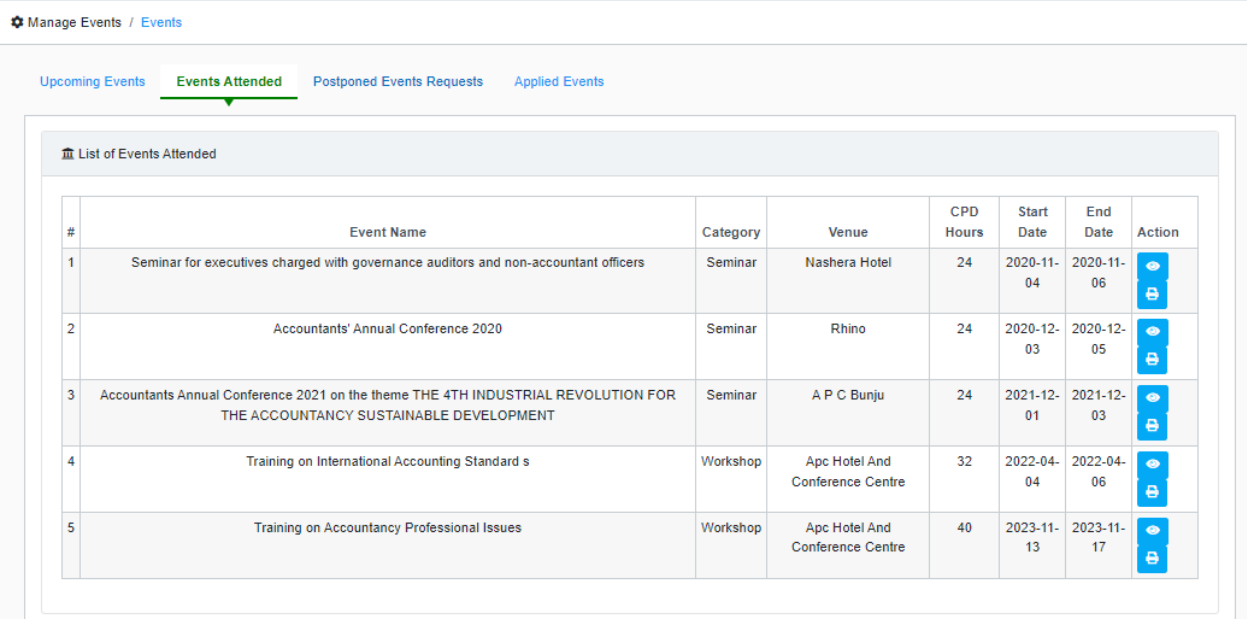
3. **Registering for an Event**
    - To register for an event, click on the action button, typically represented by an eye icon or a 'Register' link, next to the event you are interested in.
4. **Understanding Event Categories**
    - Events may be categorized as workshops, seminars, webinars, etc. Choose events that align with your interests and professional development goals.
5. **Confirming Attendance**
    - After clicking the action button, you may be prompted to confirm your attendance or provide additional information.
    - Follow the prompts to complete your registration.
6. **Postponed and Applied Events**
    - Check the 'Postponed Events Requests' tab for any changes to events you've planned to attend.
    - The 'Applied Events' tab will show you a list of events you have already applied for.

**Tips for Maximizing the 'Events' Section**

- **Early Registration**: Some events may have limited spots available. It's advisable to register early to secure your place.
- **Check Venue Details**: Make sure the venue is accessible to you and plan your travel accordingly.
- **CPD Hours**: Attend events that offer CPD hours to maintain your professional certification.

## 12.1 Accessing and Reviewing 'Events Attended' Section

The 'Events Attended' tab in the 'Manage Events' section showcases the events you have participated in. It is a record of your continued professional development.




| # | Event Name | Category | Venue | CPD Hours | Start Date | End Date | Action |
|---|---|---|---|---|---|---|---|
| 1 | Seminar for executives charged with governance auditors and non-accountant officers | Seminar | Nashera Hotel | 24 | 2020-11-04 | 2020-11-06 | |
| 2 | Accountants' Annual Conference 2020 | Seminar | Rhino | 24 | 2020-12-03 | 2020-12-05 | |
| 3 | Accountants Annual Conference 2021 on the theme THE 4TH INDUSTRIAL REVOLUTION FOR THE ACCOUNTANCY SUSTAINABLE DEVELOPMENT | Seminar | A P C Bunju | 24 | 2021-12-01 | 2021-12-03 | |
| 4 | Training on International Accounting Standard s | Workshop | Apc Hotel And Conference Centre | 32 | 2022-04-04 | 2022-04-06 | |
| 5 | Training on Accountancy Professional Issues | Workshop | Apc Hotel And Conference Centre | 40 | 2023-11-13 | 2023-11-17 | |

*Figure 46 Events Attended*

**Steps to Utilize the 'Events Attended' Section**

1. **Accessing the 'Events Attended' Tab**
    - Once logged in, navigate to the 'Manage Events' dashboard.
    - Click on the 'Events Attended' tab to see a list of all events you have attended in the past.
2. **Reviewing Past Events**
    - The screen will display a table listing past events with details such as Event Name, Category, Venue, CPD Hours, Start and End Dates.
    - This historical view allows you to track your professional development activities over time.
3. **Event Details**
    - To view more about an event, click on the 'Action' icon next to the respective event. It could be an eye icon for viewing, or it may offer options to download materials, view certificates, or similar actions.
4. **Event Categories**
    - Categories can range from seminars and workshops to conferences, providing a broad view of your professional growth areas.
5. **CPD Hours Tracking**
    - Check the CPD Hours credited for each event to ensure they align with your professional development requirements.

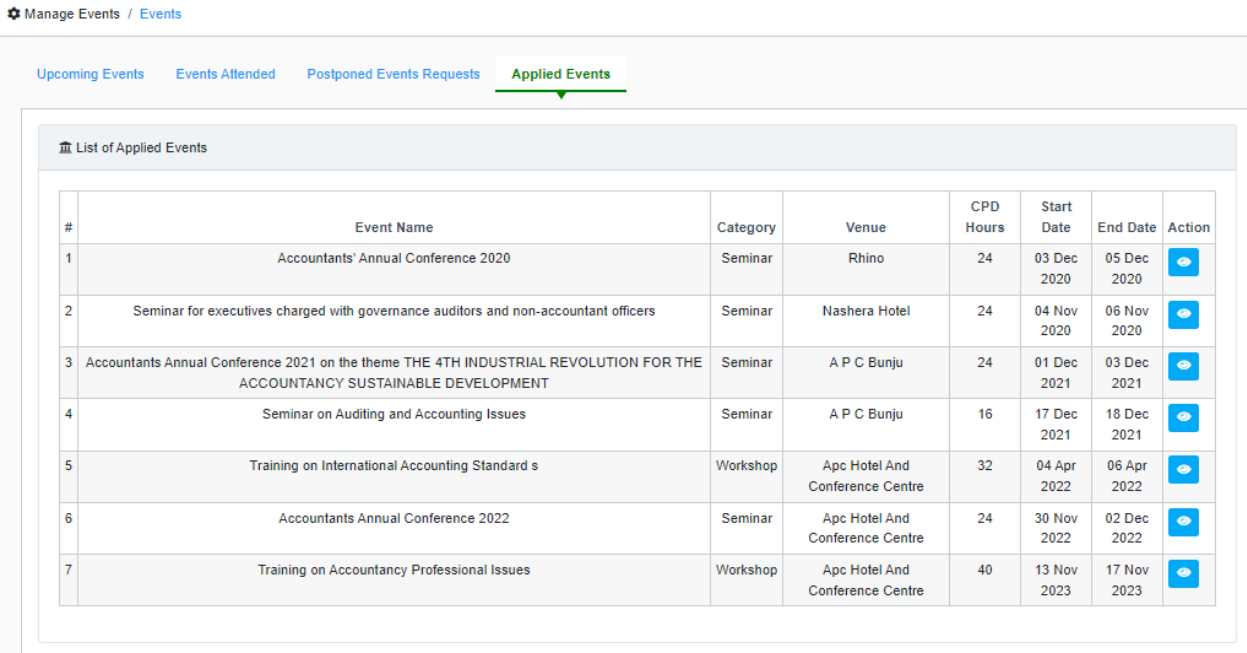
6. **Documentation and Evidence**
    - If you need to provide proof of attendance for CPD compliance or other requirements, use the 'Action' button to download certificates or attendance records.

**Tips for Making the Most of the 'Events Attended' Section**

- **Personal CPD Diary**: Use the 'Events Attended' list as a personal diary of your CPD activities.
- **Regular Review**: Periodically review your attended events to ensure your professional development is on track.
- **Record Keeping**: Ensure you download and keep personal copies of all attendance certificates and materials for your records.

## 12.2 Managing and Reviewing 'Applied Events'

The 'Applied Events' section within the 'Manage Events' portal serves as an organized space to view and manage your event applications. It reflects your proactive approach to professional development.




| # | Event Name | Category | Venue | CPD Hours | Start Date | End Date | Action |
|---|---|---|---|---|---|---|---|
| 1 | Accountants' Annual Conference 2020 | Seminar | Rhino | 24 | 03 Dec 2020 | 05 Dec 2020 | |
| 2 | Seminar for executives charged with governance auditors and non-accountant officers | Seminar | Nashera Hotel | 24 | 04 Nov 2020 | 06 Nov 2020 | |
| 3 | Accountants Annual Conference 2021 on the theme THE 4TH INDUSTRIAL REVOLUTION FOR THE ACCOUNTANCY SUSTAINABLE DEVELOPMENT | Seminar | A P C Bunju | 24 | 01 Dec 2021 | 03 Dec 2021 | |
| 4 | Seminar on Auditing and Accounting Issues | Seminar | A P C Bunju | 16 | 17 Dec 2021 | 18 Dec 2021 | |
| 5 | Training on International Accounting Standard s | Workshop | Apc Hotel And Conference Centre | 32 | 04 Apr 2022 | 06 Apr 2022 | |
| 6 | Accountants Annual Conference 2022 | Seminar | Apc Hotel And Conference Centre | 24 | 30 Nov 2022 | 02 Dec 2022 | |
| 7 | Training on Accountancy Professional Issues | Workshop | Apc Hotel And Conference Centre | 40 | 13 Nov 2023 | 17 Nov 2023 | |

*Figure 47 List of Applied Events*

**Steps to Navigate the 'Applied Events' Section**

1. **Accessing the 'Applied Events' Tab**
    - Log in to your professional development portal.
    - Navigate to the 'Manage Events' area.

- Click on the 'Applied Events' tab to review your event applications.

2. **Reviewing Applied Events**
    - The 'Applied Events' tab presents a table containing details of the events you've applied for, including Event Name, Category, Venue, CPD Hours, and dates.
3. **Event Application Details**
    - For more detailed information about a specific event application, select the corresponding 'Action' button. This could present options like viewing more details, checking application status, or accessing related documents.
4. **Track Your Applications**
    - Monitor the status of each event application. Look for statuses like 'Pending', 'Approved', or 'Declined' to plan accordingly.
5. **Managing Applications**
    - Use this tab to manage your applications effectively. You may have the option to cancel or modify applications depending on the event's application policies.
6. **Preparing for Upcoming Events**
    - Once an application is approved, prepare for participation. This might include arranging travel, accommodations, or scheduling time away from work.

**Additional Features**

- **Notification Settings**: Adjust your notification preferences to receive updates about your event applications.
- **Documentation**: If any event requires additional documentation for the application, ensure that it's uploaded and submitted correctly.
- **Feedback on the Application Process**: Provide feedback on the application process if such functionality is available. This helps improve the system for all users.

## 12.3 Event Details Review and Application Process

This script guides the user through the process of accessing detailed information about a specific event and applying for it through the professional development platform.

# 13 Question Bank List

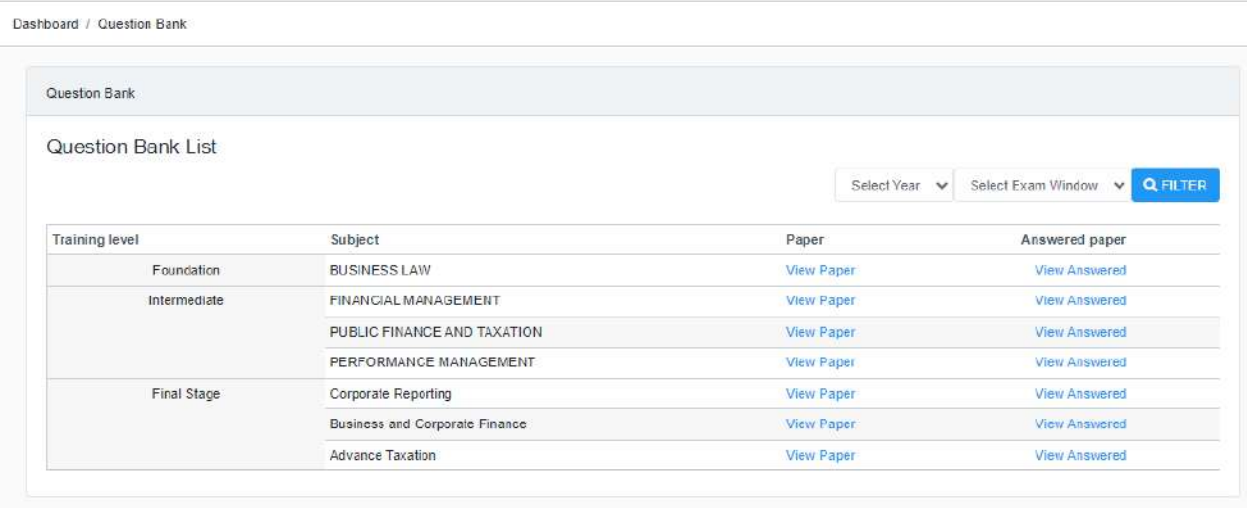



*Figure 48 Question Bank List*

1. **Login and Navigation**
    - Begin by logging into the platform with your credentials.
    - From your dashboard, navigate to the 'Question Bank' module.
2. **Selecting Training Level and Subjects**
    - View the list of subjects available under each training level (e.g., Foundation, Intermediate, Final Stage).
    - The subjects might include 'BUSINESS LAW', 'FINANCIAL MANAGEMENT', 'PUBLIC FINANCE AND TAXATION', etc.
3. **Accessing Exam Papers**
    - Next to each subject, find the 'View Paper' link to access the exam paper.
    - Click on 'View Paper' to open or download the document for review.
4. **Reviewing Answered Papers**
    - For solved or answered papers, click on 'View Answered' next to the corresponding subject.
    - This action will lead you to a version of the paper that includes answers for self-assessment and study.
5. **Filtering Options**
    - Utilize the 'Select Year' and 'Select Exam Window' filters to refine the list of question papers you wish to study.

- Apply the filters by clicking the 'FILTER' button after your selections.

6. **Studying and Practice**
    - Use both the exam papers and answered papers for effective studying and practice.
    - Review answered papers to understand the expectations for correct answers and examiners' marking schemes.

# 14 Examination Session History Feature

This script will guide you on how to navigate and utilize the Examination Session History to view past examination sessions, including details such as level, dates, and status.

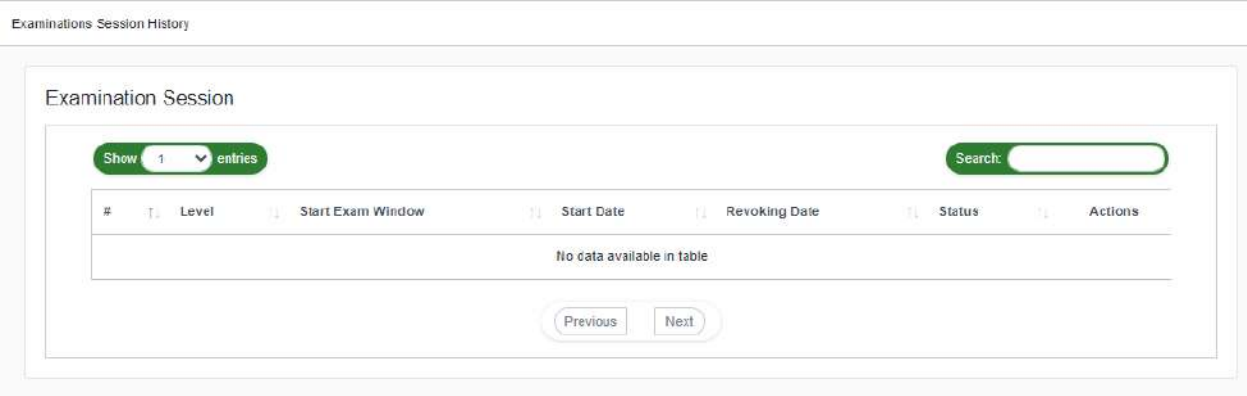



*Figure 49 Examination Session History*

**Steps for Users**

1. **Login to the Platform**
    - Access the educational platform by entering your credentials to log in.
    - Ensure you navigate to the appropriate section for Examination Session History, which might be under an "Examinations" or "History" tab in the dashboard.
2. **Viewing Examination Session History**
    - On the Examination Session History page, you will see a table that lists all your past examination sessions.
    - The table columns include Level, Start Exam Window, Start Date, Revoking Date, Status, and Actions.
3. **Understanding the Table**
    - **Level**: The academic or certification level of the examination.

- **Start Exam Window**: The designated timeframe during which the examination was available.
- **Start Date**: The actual date when the examination commenced.
- **Revoking Date**: The date on which the examination results or certification may have been revoked or expired.
- **Status**: The current status of the examination session (e.g., Passed, Failed, In Progress, Revoked).

4. **Searching for Specific Sessions**
    - Use the 'Search' box to quickly find specific examination sessions by entering relevant keywords such as the level or date.
5. **Adjusting Entries Shown**
    - Adjust the number of entries shown by selecting different options from the 'Show entries' dropdown menu.
6. **Navigating Through the History**
    - Navigate through multiple pages of your history using the 'Previous' and 'Next' buttons if your history spans multiple pages.
7. **Taking Actions**
    - If available, utilize the 'Actions' column to download certificates, view detailed results, or see actions taken on the exam session.