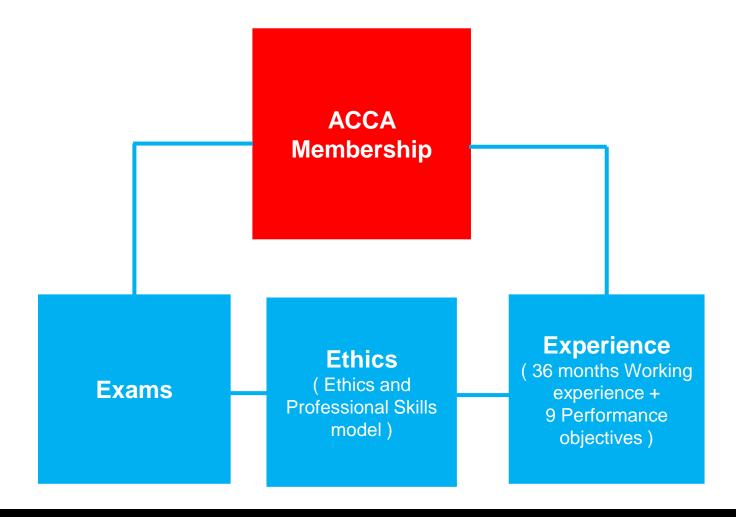
ACCA Membership Application Guide

会员申请指南

ACCA Qualification



Ethics and Professional Skills Module 职业道德与专业技能模块

主要学习内容

共10个单元,最后一个单元为测试评估

Unit 1 职业道德与专业素质 Ethics and professionalism

Unit 2 个人效能 Personal effectiveness

Unit 3 创新与质疑精神 Innovation and skepticism

Unit 4 商业意识 Commercial awareness

Unit 5 领导力与团队协作 Leadership and team working Unit 6 沟通交流与人际交往技能 Communication & interpersonal skills

Unit 7 数据分析 Data analytics

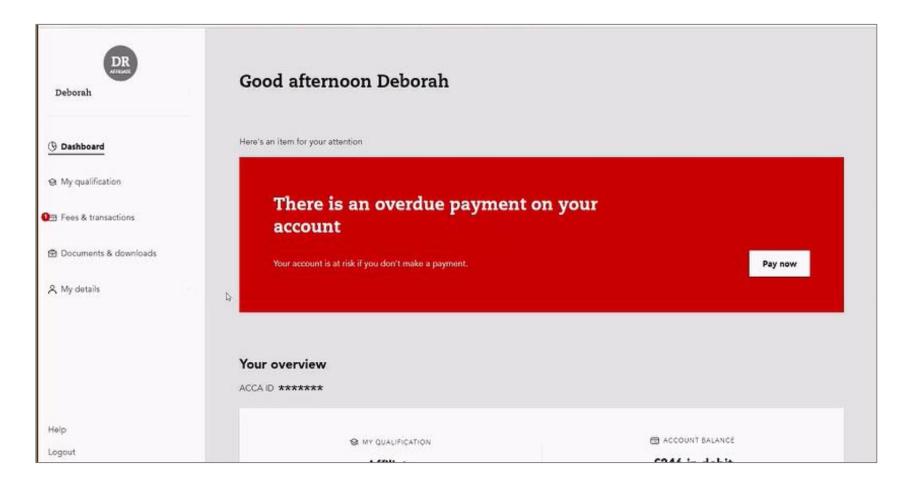
Unit 8 案例研究 Case study

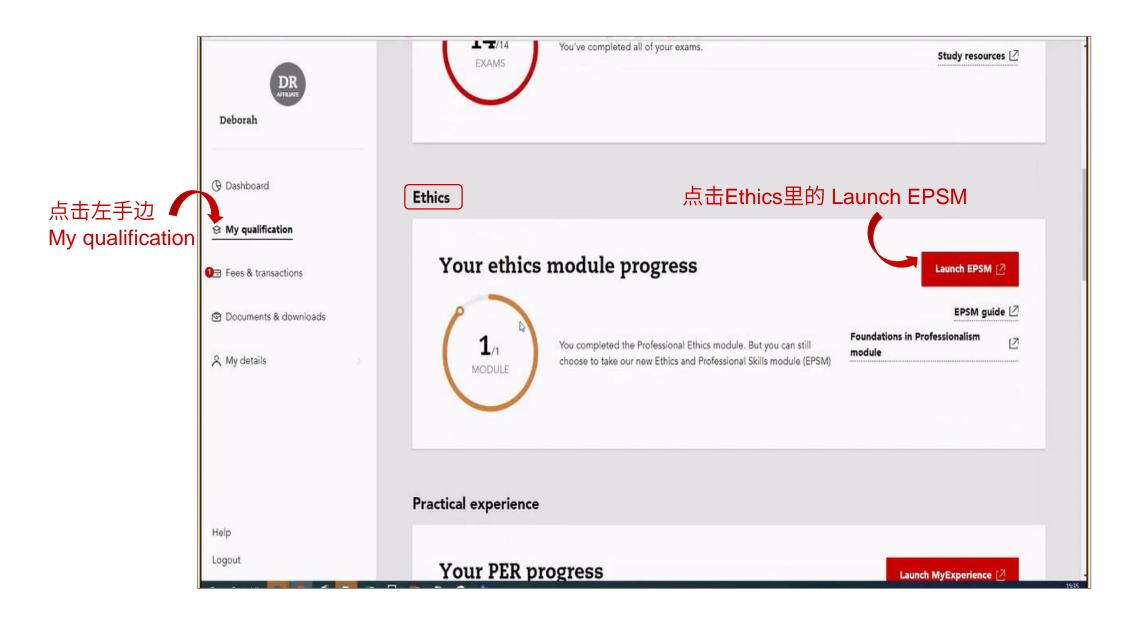
Unit 9 战略专业支持 Strategic professional support

Unit 10 模块结束评估 End of module assessment



登录myACCA





Experience (PER)

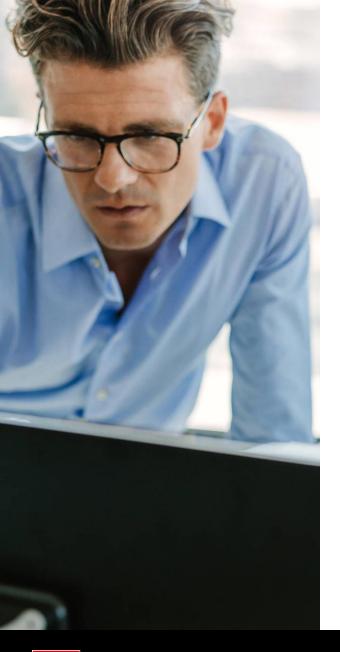
36 Months Relevant Role + 9 Performance Objectives 累计 36 个月财会相关工作经验 + 完成 9 个绩效目标



Practical Experience Supervisor (PES)

您需要找一位PES帮您在线确认:

- ✓ 36 months' working experience 累计 36 个月财会相关工作经验
- ✓ 9 Performance objectives 完成 9 个绩效目标



Practical Experience Supervisor (PES)

如何定义PES?

A qualified accountant of a professional accountancy or audit body recognised by law in this country who knows your work.

*If your line manager is not suitably qualified, you need to identify someone qualified to sign-off the objectives, but your line manager can still sign-off your working time.



Practical Experience Supervisor (PES)

Who can sign off my PER?

职场关系	定义	审批工作时间	审批Performance Objectives
IFAC Qualified Line Manager	既是您的上级,也拥有IFAC相关资质	V	V
Non IFAC Qualified Line Manager	仅仅是您同一职场的上级或HR	\checkmark	
IFAC Qualified-Internal Supervisor	公司内部其他比您资深的经理同事, 也拥有IFAC相关资质	V	V
IFAC Qualified-External Supervisor	公司外部有业务往来的机构里拥有IFAC相关 资质的会计师、审计师或咨询师		V

*IFAC: International Federation of Accountants(国际会计师联合会)

主要成员: ACCA, CICPA等等

(拥有这类型专业资格的称为IFAC Qualified, IFAC体系内的成员都可成为您的PES)

更多IFAC相关信息请浏览以下网址:

https://www.ifac.org/what-we-do/global-impact-map

Record Your PER 录入实践工作经验

Recording your Experience

✓ 36 Months Working Experience
累计 36 个月财会相关工作经验

✓ 9 Performance objectives 完成 9 个绩效目标

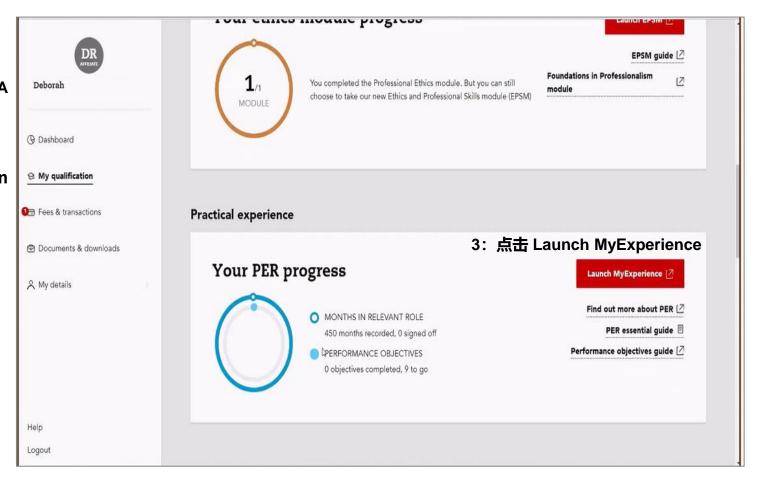


Recording your Experience

Path 1

1: 登录 myACCA

2: 点击 My qualification

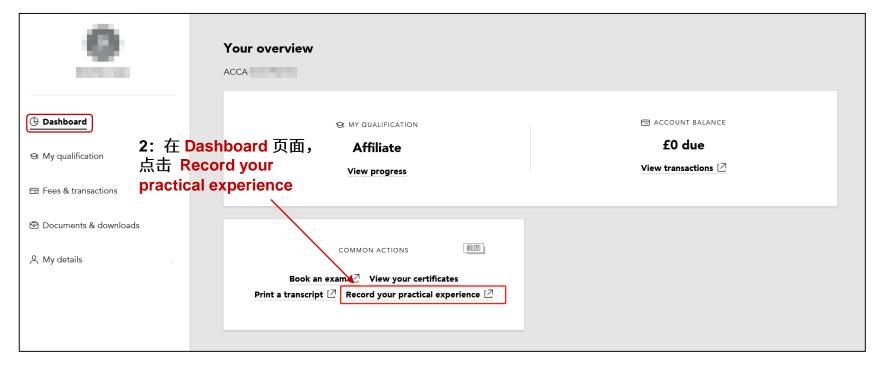




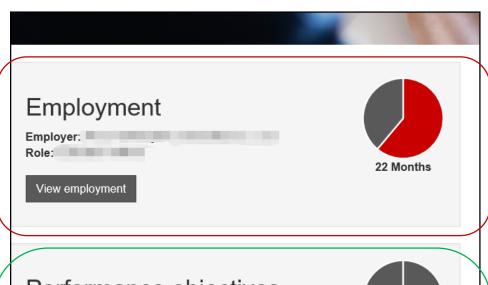
Recording your Experience

Path 2

1: 登录 myACCA

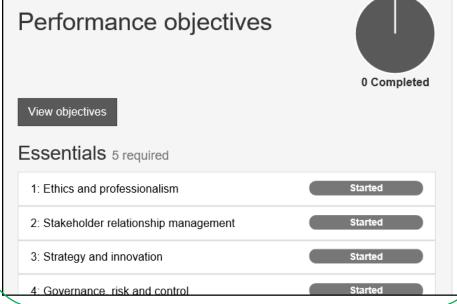








- 记录工作经验(时间) 添加或编辑PES信息





完成9个Performance objectives



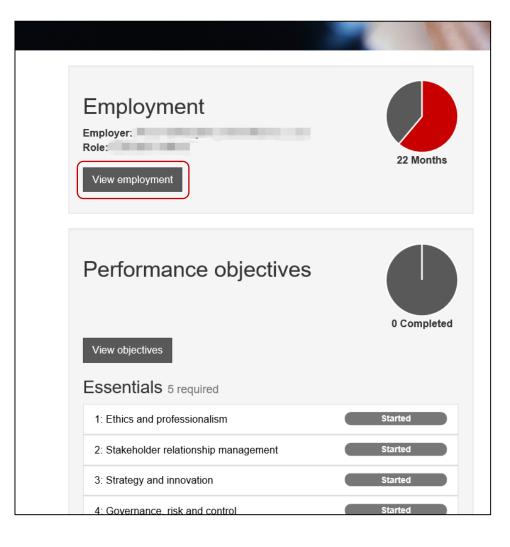
Public



16



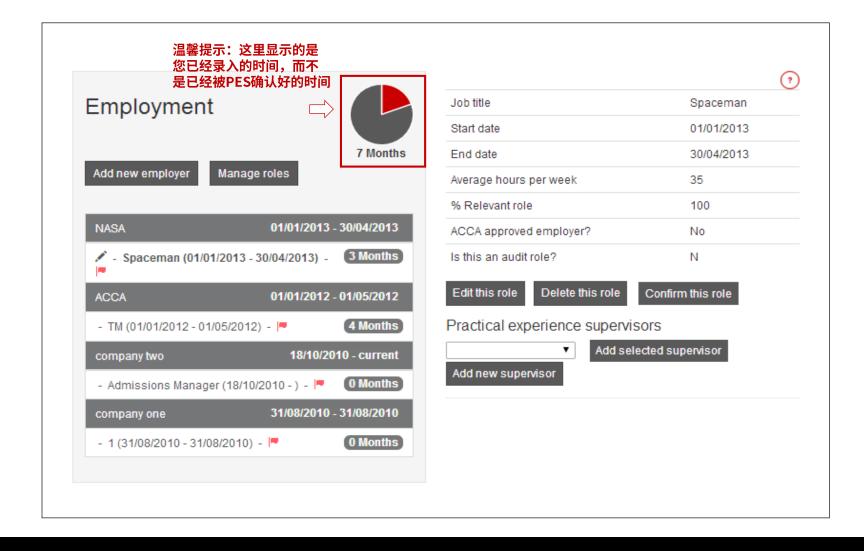
记录36个月财会相关工作经验与PES信息



点击 "View employment" 后, 可以记录PES的信息和工作时间。



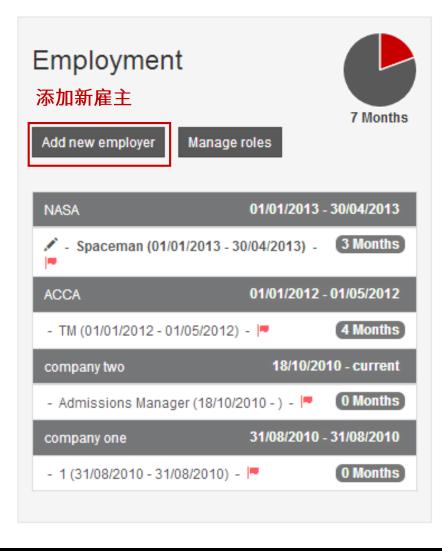
记录36个月财会相关工作经验与PES信息



18



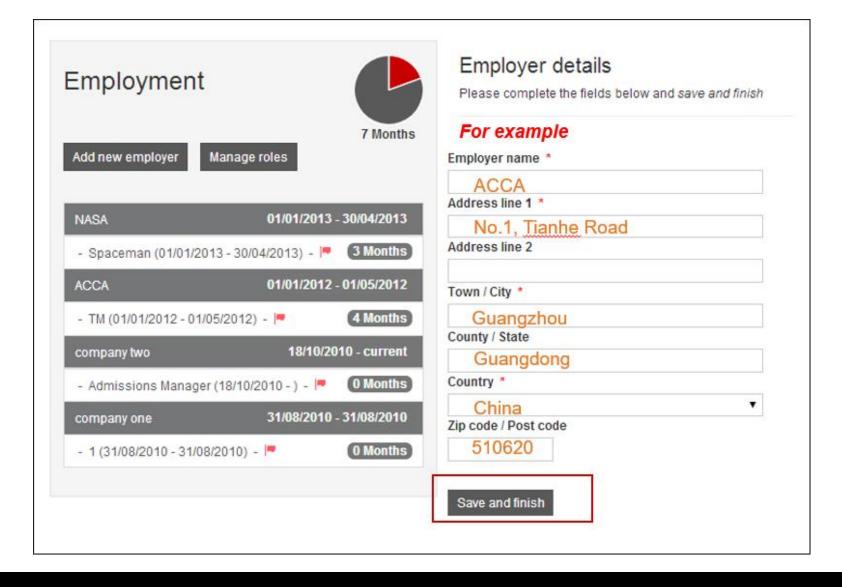
编辑雇主信息



注意: 因为PES (Practical Experience Supervisor) 是直接绑定在每一份工作经验里的,所以要先添加和 编辑好雇主信息和职位信息,系统方能出现PES的部 分供编辑。

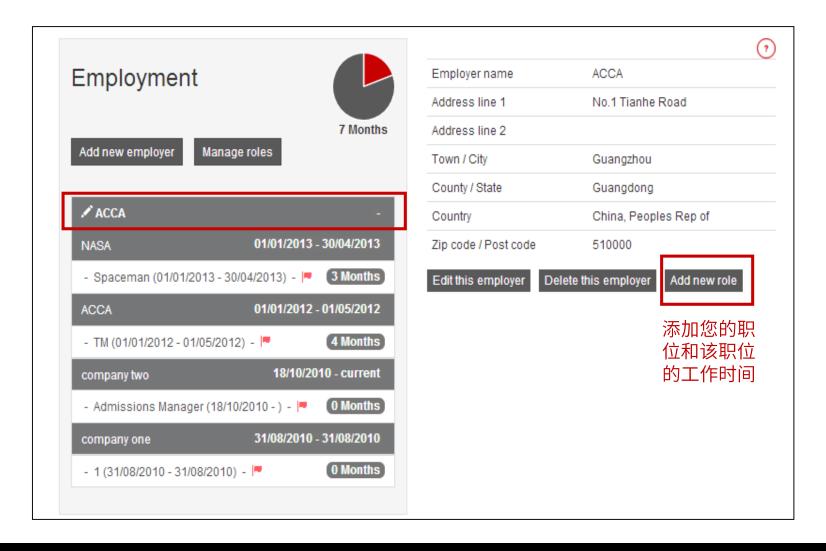


编辑雇主信息



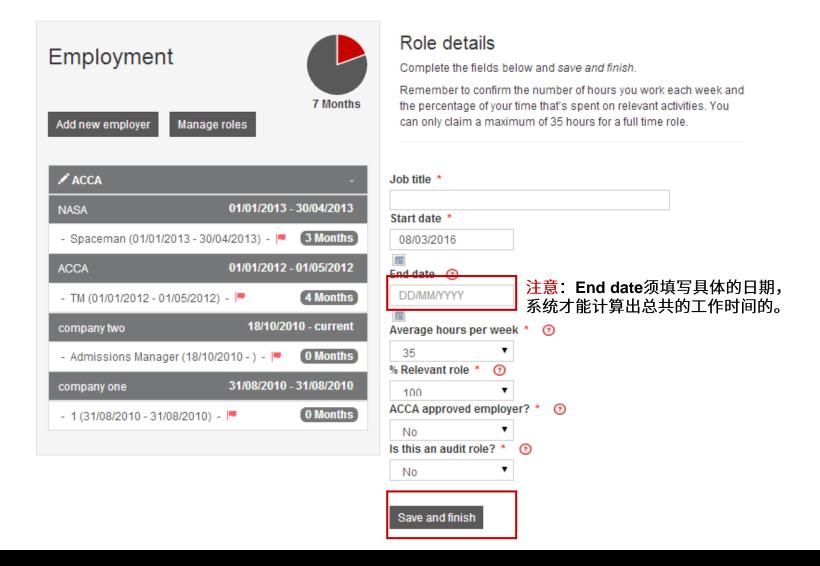


编辑雇主信息





编辑职位信息



22

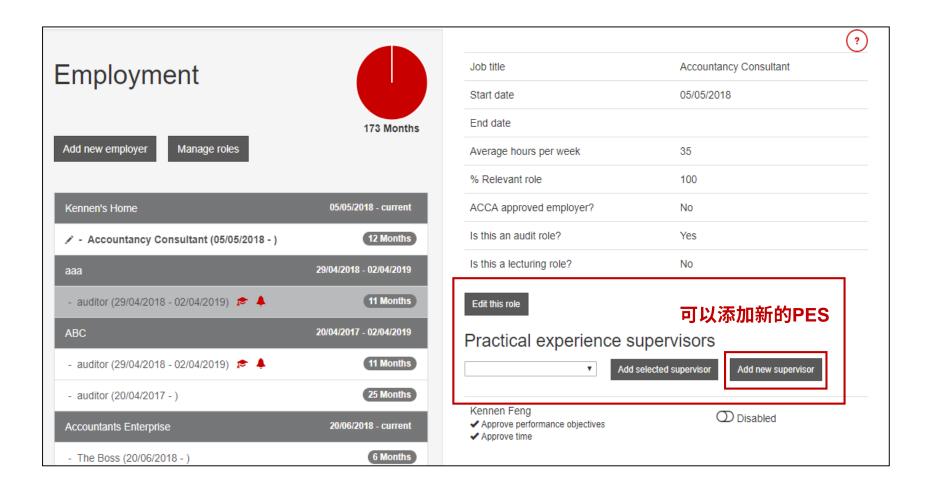


23



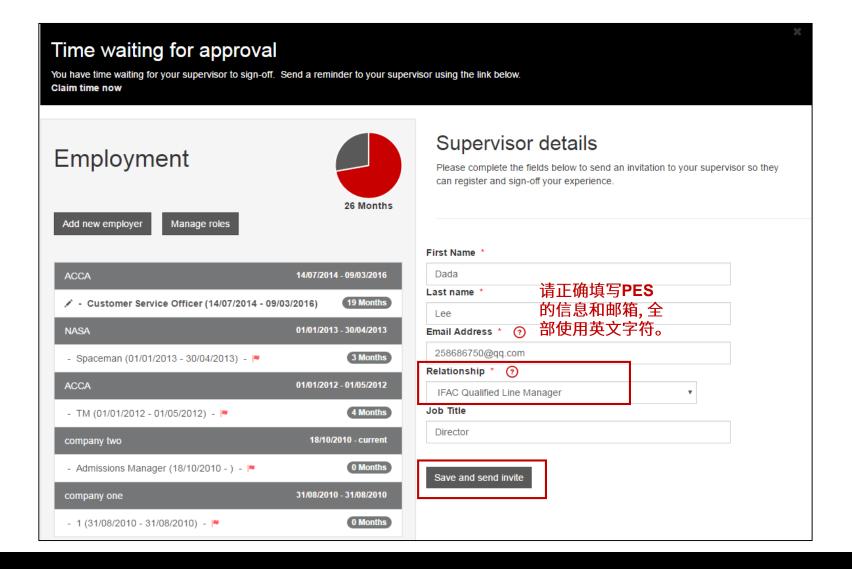
添加职场导师

Practical Experience Supervisor (PES)





编辑PES信息





PES收到的邀请邮件范例

在您填好PES的信息并发送邀请后,您的PES会收到一封邮件(如下图),他/她可以点击邮件里的链接开始创建ACCA账户来确认您的工作时间和批阅 Performance objectives。

Dear Dada Lee

Carol Guillermina Quiroga Wyper has nominated you as their practical experience supervisor to help them complete the practical experience requirement (PER) - an important component of the ACCA Qualification.

Please use the link below to start the registration process.

https://experience.accaglobal.com/Public/report.aspx?memberQueryID=22F5C6FD-9335-4C0D-AB1A-368D38DD4A72&WPSREFID=31607E19-1C80-48C5-A29A-3CDD0759EBCE

ACCA has lots of resources to help you understand the PER policy and support your trainees in achieving it, find out more at My ACCA

ACCA recognises the contribution that practical experience supervisors make to the development of ACCA trainees and thank you for your commitment and support.

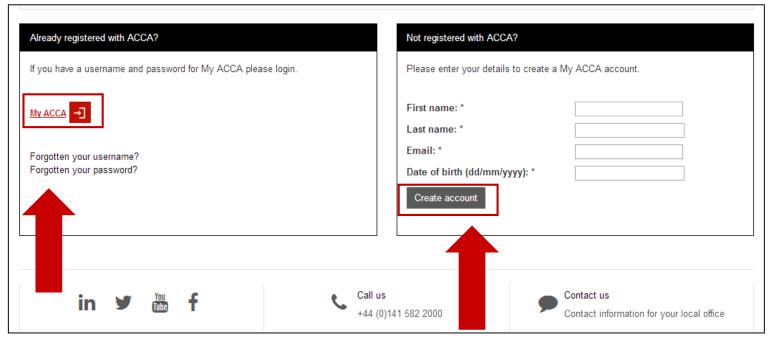
Regards

ACCA

Please note this email is an automated notification which is unable to receive replies. If you have any questions please contact us.



PES 建立审批账号



您的PES已是ACCA会员:

点击左边的myACCA链接, 登录到他/她自己原来的会员账 号即可绑定账号。

您的PES不是ACCA会员:

按照步骤提示建立一个ACCA账 户,用以批阅您的工作经验(Time) 与Performance objectives.



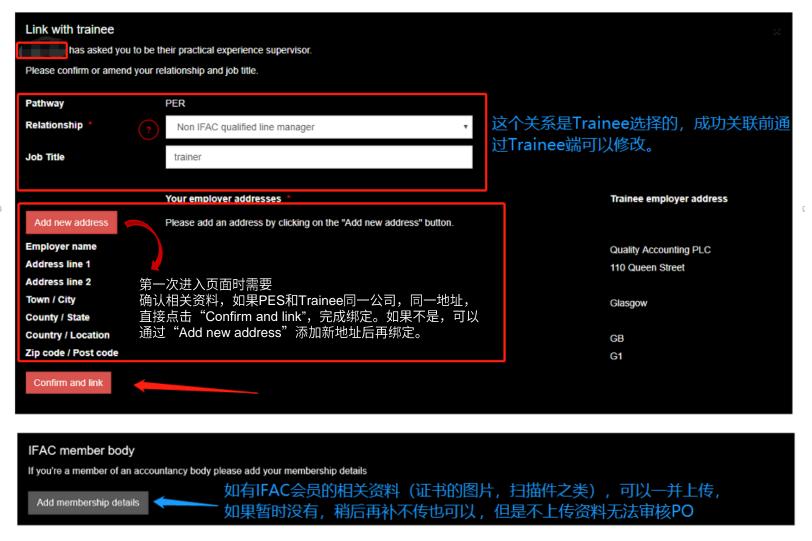
您的PES可到ACCA全球官网 - www.accaglobal.com 登录他/她的myACCA





PES可在此处选择添加相关资格证书,并确认与您的职场关系

*PES受邀后的步骤(用于绑定/关联Trainee)的页面 - 更新于2021年3月



ACCA Think Ahead



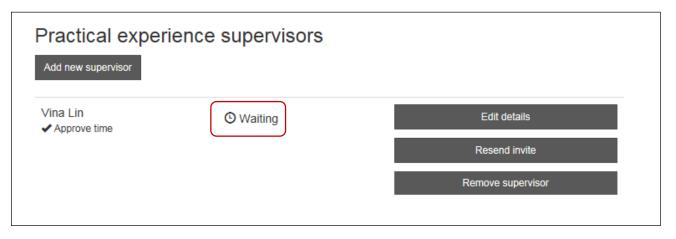


31



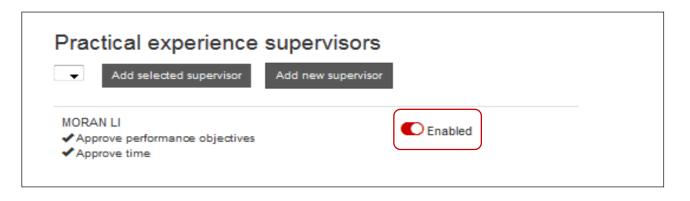
相关状态

等待 PES 接受邀请的状态



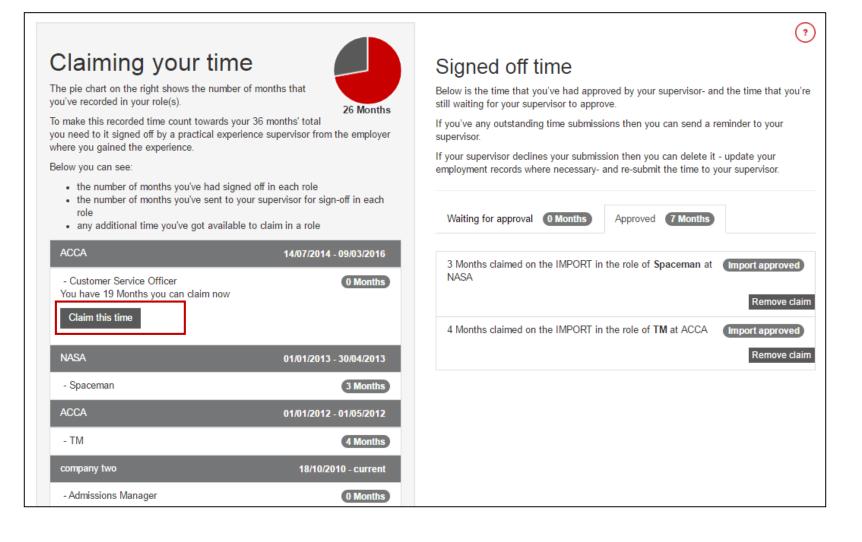
PES已经接受邀请和绑定账号的状态

(此状态下,可以提交审批。右下角显示状态为"Enabled"的时候,代表PES已经和学员的账号联结,可以审批学员的工作经验.)





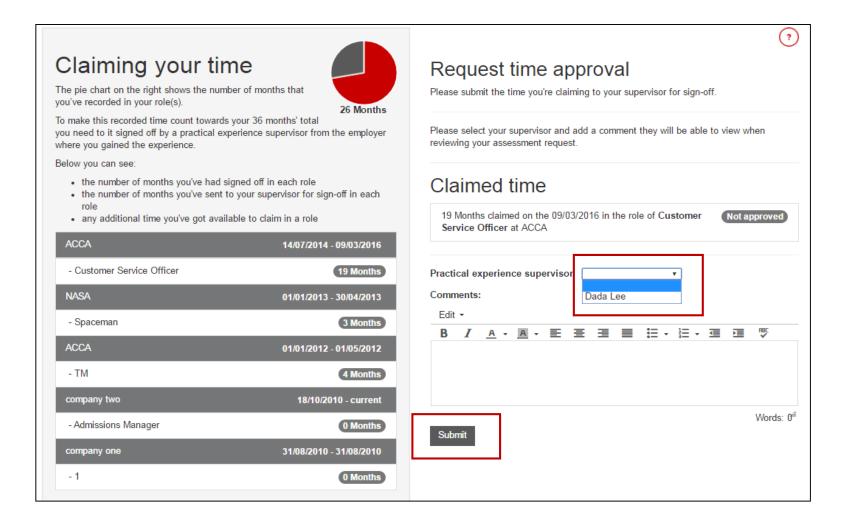
提交工作时间给PES审核



ACCA Think Ahead

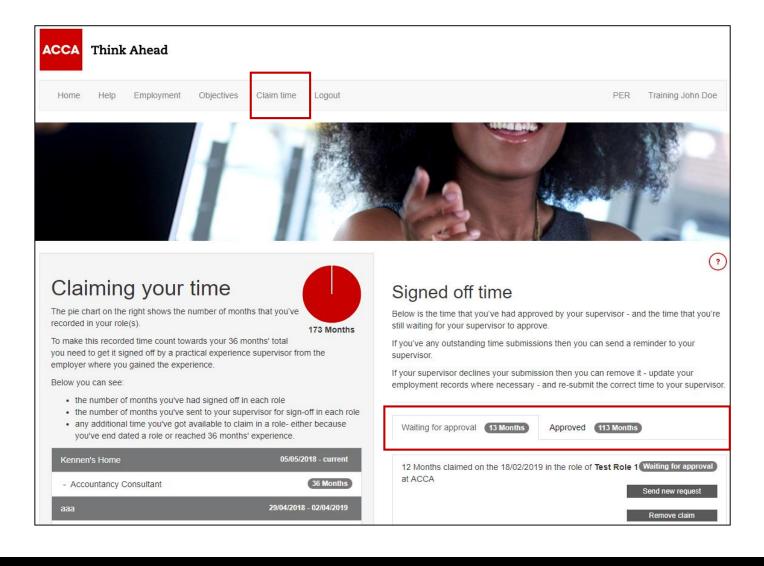


提交工作时间给PES审核





查看确认好的工作经验(时间)

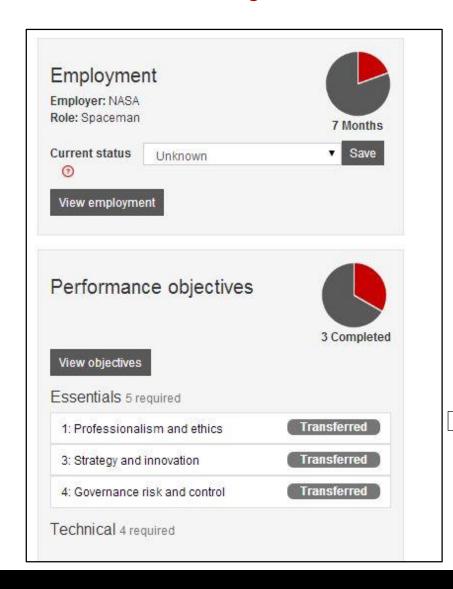


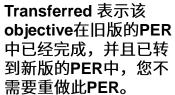


9 Performance objectives

Five Essentials + Four Technicals

点击View Objectives

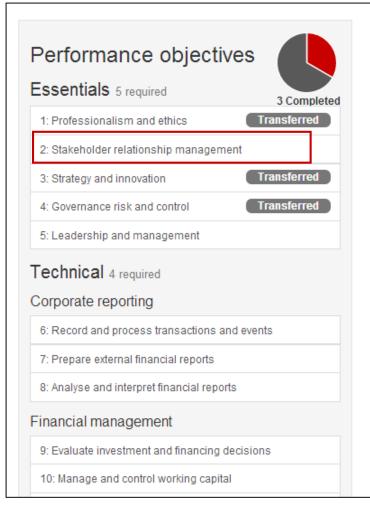






Public

点击其中一条您完成的PO



Performance objectives

You need the right skills and abilities to be a qualified accountant. Our practical experience requirement (PER) is an essential part of the ACCA qualification. Completing the performance objectives will help reinforce your learning from exams.

There are two types of performance objective: Essentials and Technical. You must complete all five essentials. There are 15 technical performance objectives, we need you to demonstrate your experience in four of these.

How to complete your performance objectives

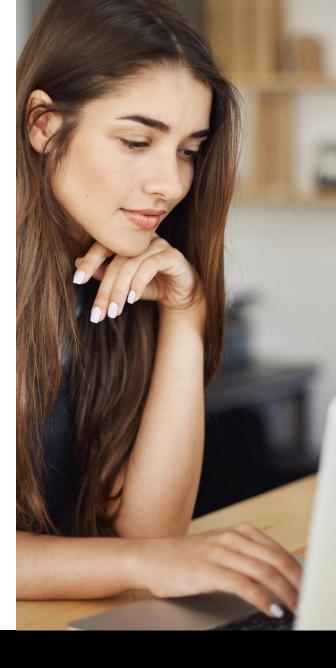
All the performance objectives are made up of individual elements. For each performance objective, you have to do the following:

- write a short statement describing your experience
- . get your supervisor to confirm that you have completed all of the
- have the performance objective signed off by your supervisor.

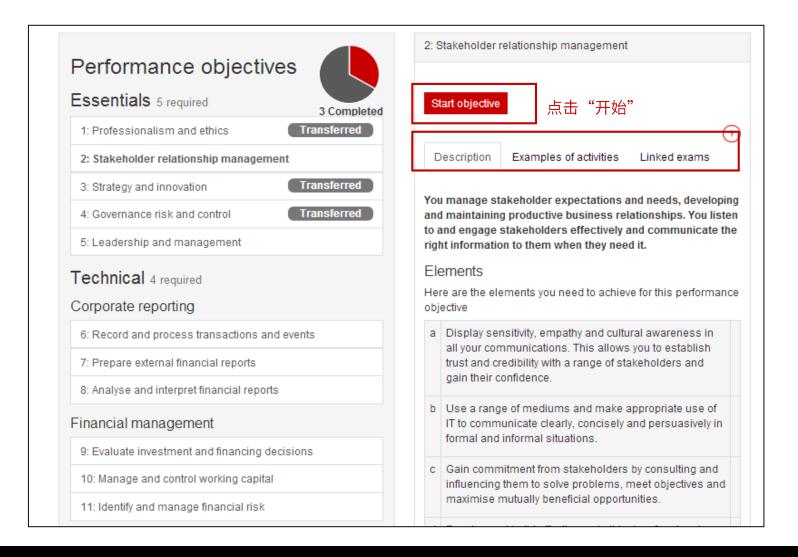
Some advice from our experts: it's a really good idea to complete your PER as you go along. And get individual elements signed off as soon as you complete them!

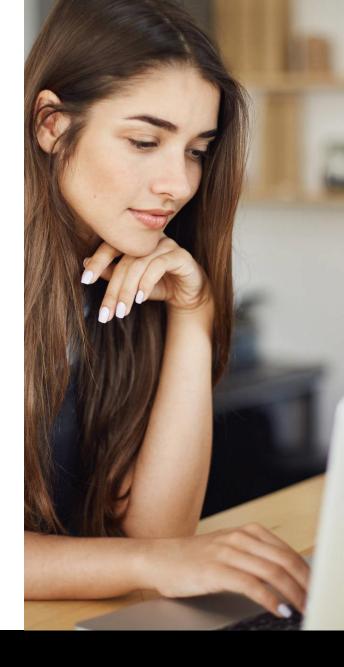
More information about each objectives can be found by clicking on the performance objectives on this page.

If you start a performance objective accidently, don't worry - you can cancel it on the objective page.



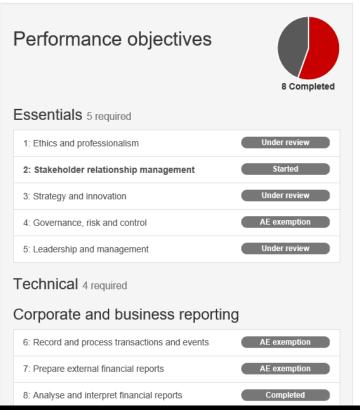
开始完成选择了的PO

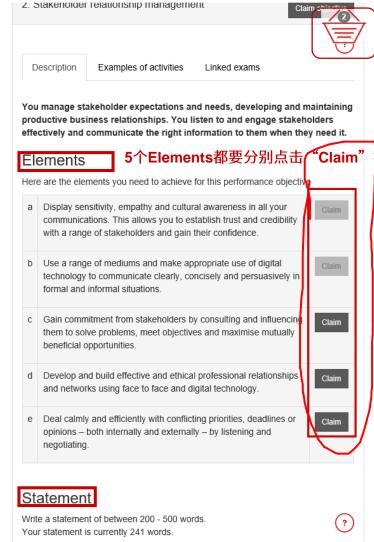




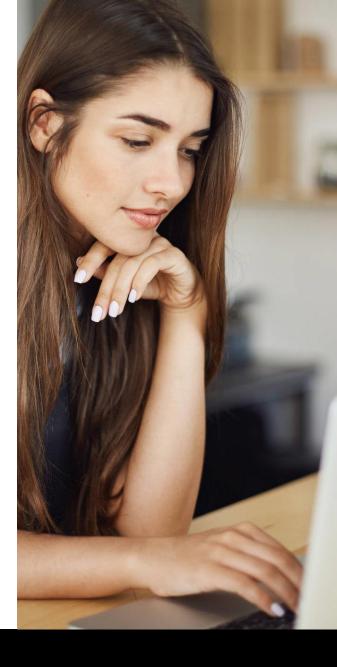
对于已经完成的Elements,点击 "Claim"







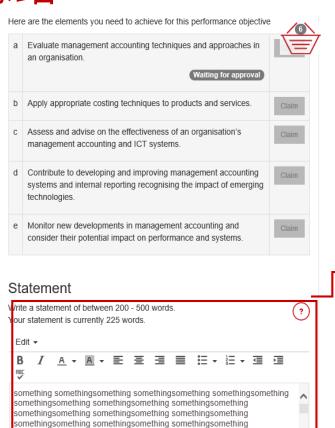
点击Claim按钮后, Claim按钮会变灰 色,右<u>上角也会</u>出 现一个篮子图标。



ACCA Think Ahead

撰写这个PO的总结

Performance objectives Essentials 5 required Under review 1: Ethics and professionalism 2: Stakeholder relationship management 3: Strategy and innovation Under review 4: Governance, risk and control AE exemption Under review 5: Leadership and management Technical 4 required Corporate and business reporting AE exemption 6: Record and process transactions and events 7: Prepare external financial reports AE exemption 8: Analyse and interpret financial reports Completed Financial management 9: Evaluate investment and financing decisions Under review 10: Manage and control working capital 11: Identify and manage financial risk

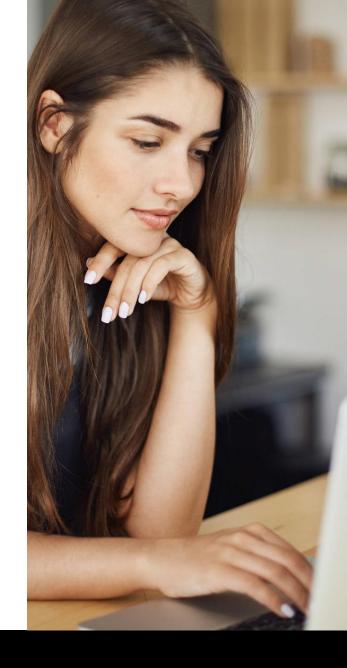


somethingsomething somethingsomething somethingsomething something

Save statement

把鼠标移到问号的 图标处,会显示要 求的详细说明。

在这里填入200-500字的总结,然 后保存。(注意:少 于200字和多于500 字都无法提交)



Management accounting

12: Evaluate management accounting systems

Under review

新会员关于完成Performance objectives的经验分享

强烈建议 4 个可选的 PO 选自己目前工作的领域来写,并且一定要结合自己在公司的职位以及日

常工作中与该职务有着密切联系的工作事项进行阐述,切记不能写套话空话之类的,如果实在是

不能往要求的 5 个 elements 上来靠的话,也希望大家能尽量的去靠着写。

尽量去举与自己工作领域相关的例子来写,比如阐述完职业道德定义之后,首先就可以举自己在

工作中碰到的某项事情是不能做的例子,因为是违反了 ACCA 的某一项职业道德,然后自己做

为 ACCA 的准会员是有责任和义务在自己的职责权限范围内提醒他人这样做是违反了职业道德

的,举例说明特别是举自己在实际工作中碰到的事项是最具说服力的,因为 ACCA 特别关注大

家在平时的工作中碰到的问题以及解决这些问题的能力,而不是纯粹为了通过考试而考试的。

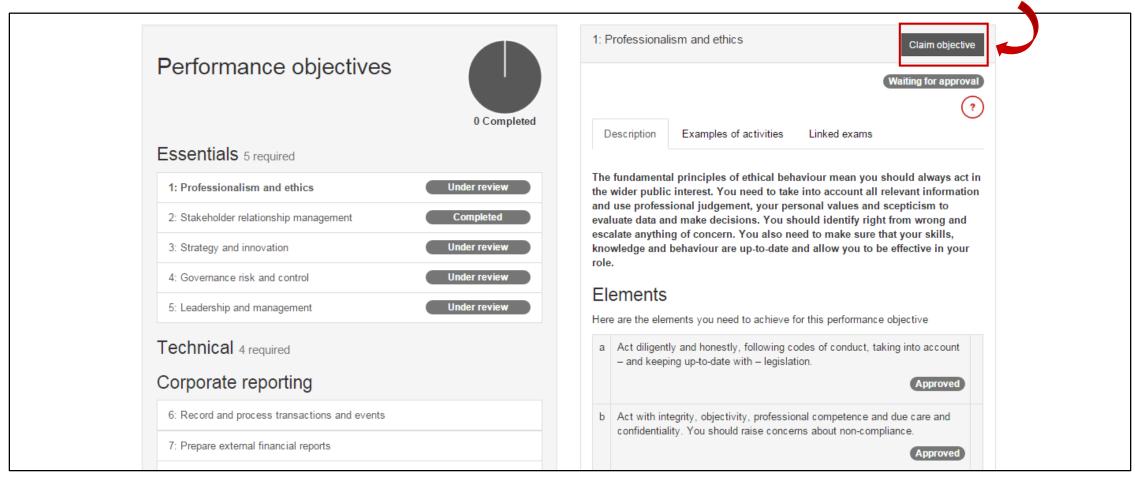
因为我是写的比较认真,所以每个PO平均下来大概用了半个小时完成。



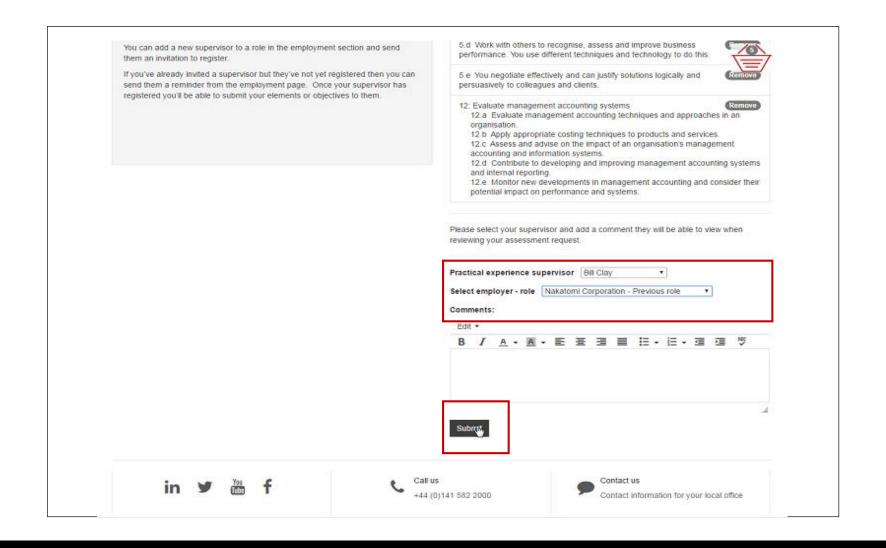


提交PO给PES审批

如果您已经完成了所选PO里面的 Statement和5个Elements,您可以直接 点Claim objective提交整一个PO。



提交完整的一个PO给PES审批





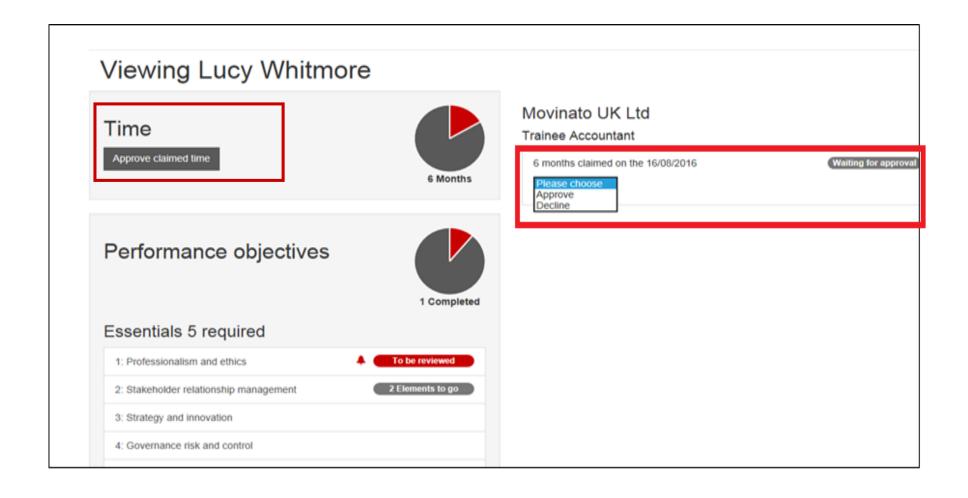
您的PES到ACCA全球官网 - www.accaglobal.com登录他/她的myACCA



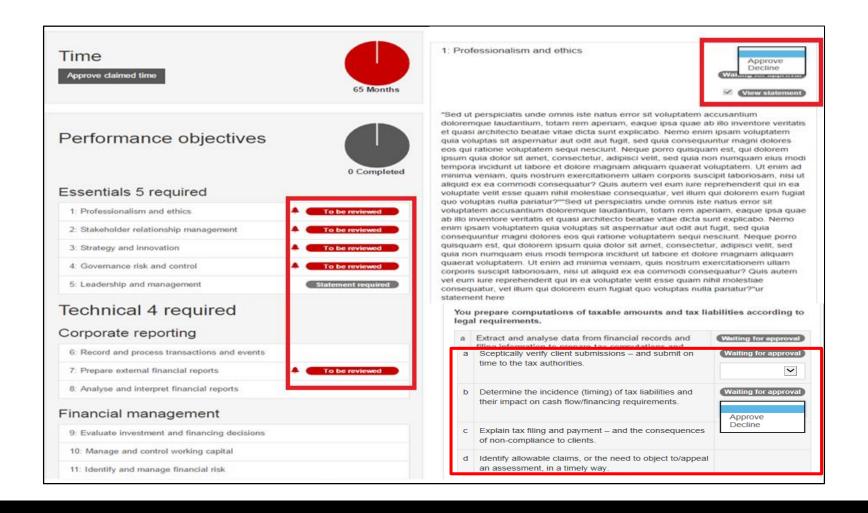
Sample - PES收到需要审核的PO的请求样板

Trainee name	Permissions	Tasks	
Training John	Can sign performance	0 Objectives waiting for	View trainee
Doe	objectives	assessment	
	Can approve time	0 Elements waiting for assessment	
		0 Time waiting for assessment	

PES审批工作经验(时间)



PES审批PO





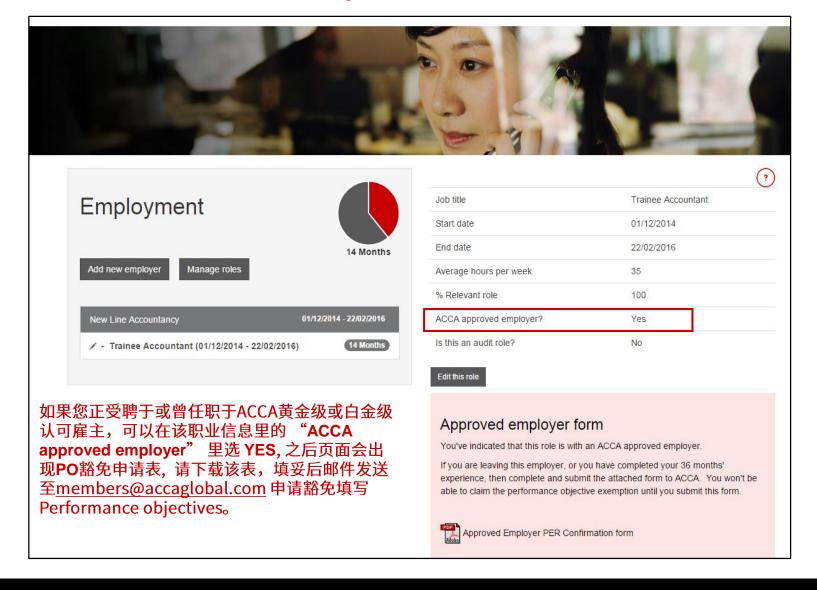
Step 1:登录myACCA录入工作经验

请查阅本指南P16-22

Step 2:下载并填写Approved Employer PER confirmation form

*用以申请豁免Performance objective

申请豁免Performance Objective



豁免申请表 Approved Employer PER Confirmation Form

1 YOUR WORKPLACE DETAILS		
To be completed by the trainee		
Full name		
ACCA registration number		
Organisation name		
Approved Employer number	□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□	号
Job title		
Dates of employment From:	To:	Months in a relevant role
Employer address		在该雇主工作了多少个
2 GOLD OR PLATINUM ACCA APPRO PRACTICAL EXPERIENCE SUPERVIS		T OR
To be completed by the ACCA Approve	ed Employer primary contact or pract	ical experience supervisor
Full name		
		ES是ACCA会员,请填写注册
	如果PE	ES是ACCA会员,请填写注册
ACCA registration number (if applicable) Job title		
ACCA registration number (if applicable) Job title		ES是ACCA会员,请填写注册· ·

豁免申请表 Approved Employer PER Confirmation Form

必须完成,全部由PES签字 并签上完成日期。

按照个人情况选择4项已经 在职场上达到的目标,由 PES签字,并签上完成日期。

	Performance Objective	Signature	Date (DD/MM/YYYY
ESSENTIALS	1 Ethics and professionalism		
	2 Stakeholder relationship management		
	3 Strategy and innovation		
	4 Governance, risk and control		
	5 Leadership and management		
	6 Record and process transactions and events		
	7 Prepare external financial reports		
	8 Analyse and interpret financial reports		
	9 Evaluate investment and financing decisions		
	10 Manage and control working capital		
TECHNICAL	11 Identify and manage financial risk		
	12 Evaluate management accounting systems		
	13 Plan and control performance		
	14 Monitor performance		
	15 Tax computations and assessments		
F	16 Tax compliance and verification		
	17 Tax planning and advice		
	18 Prepare for and plan the audit and assurance process		
	19 Collect and evaluate evidence for an audit or assurance engagement		
	20 Review and report on the findings of an audit or assurance engagement		
	21 Business advisory		
	22 Data analysis and decision support		
nas b	ion to achieving the perfromance objectives signed off above been employed by this organisation during the dates entered chieved the number of months in a relevant role claimed in s	in section 1	

- is eligible to claim the performance objective exemption.

Print name

PES签字 Signature

签字日期

Step 4: 发送扫描版的表格到members@accaglobal.com

Step 5: 申请会员

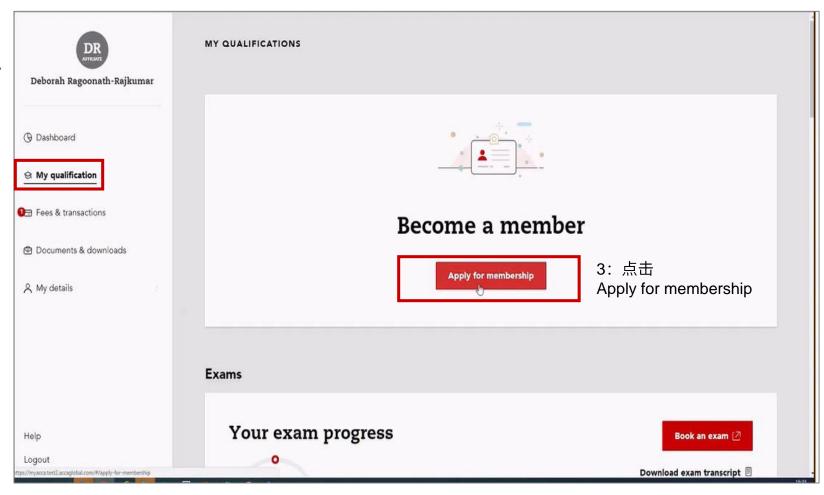
等待总部回复(一般10个工作日内), 并根据回复指引在myACCA操作申请会员即可。

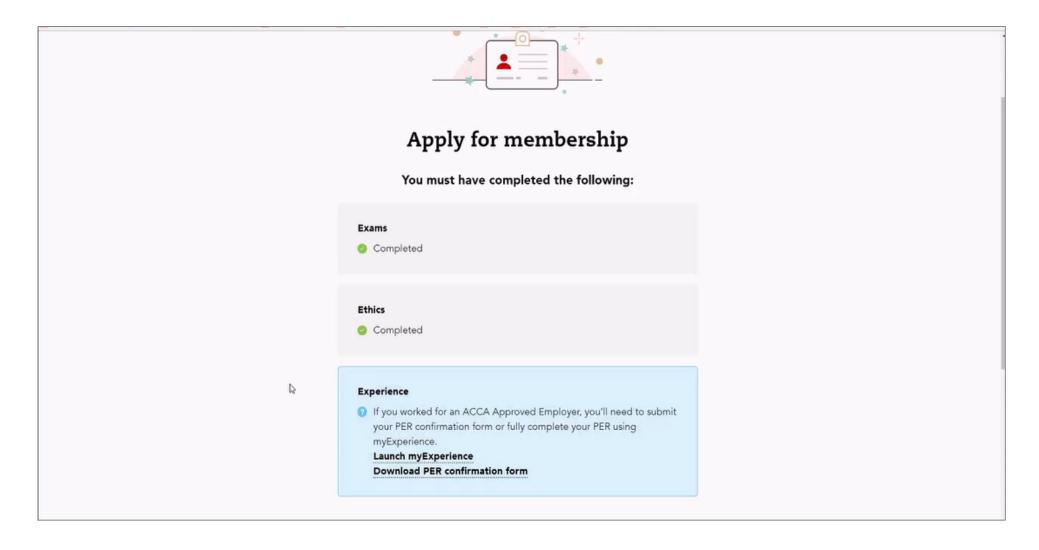


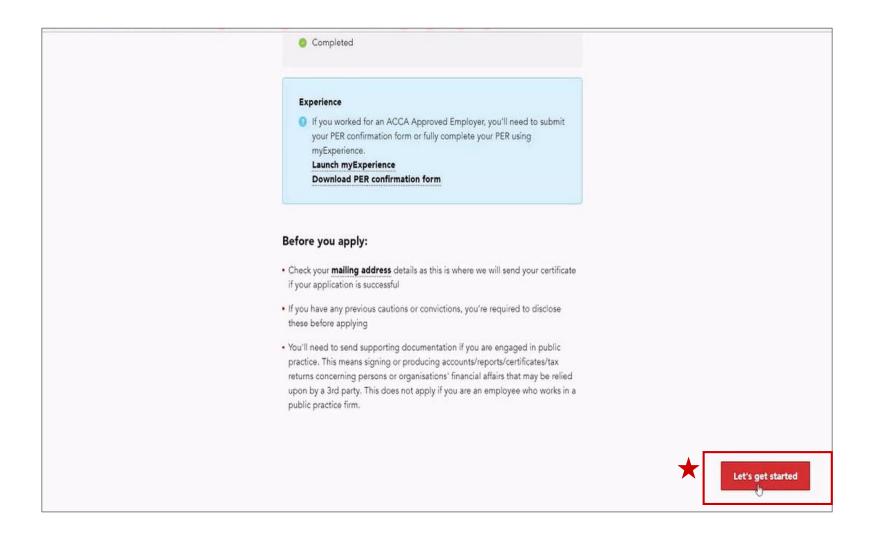
登录myACCA, 在线提交会员申请

1: 登录 myACCA

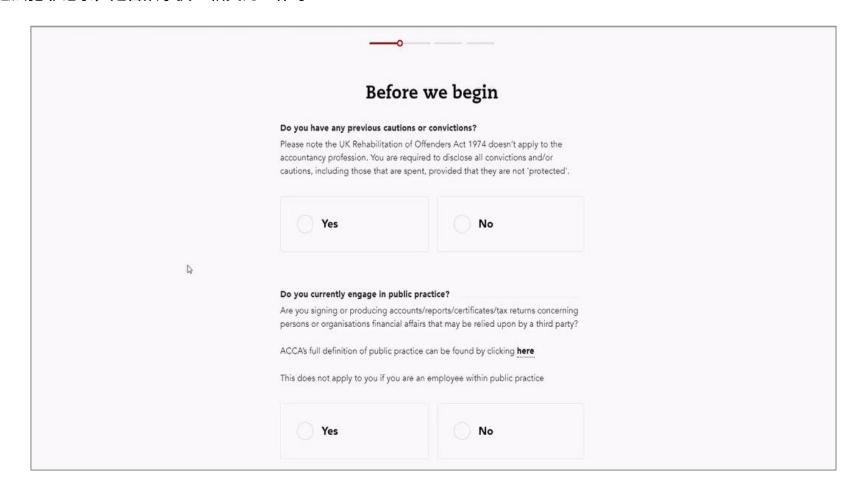
2: 点击 My qualification



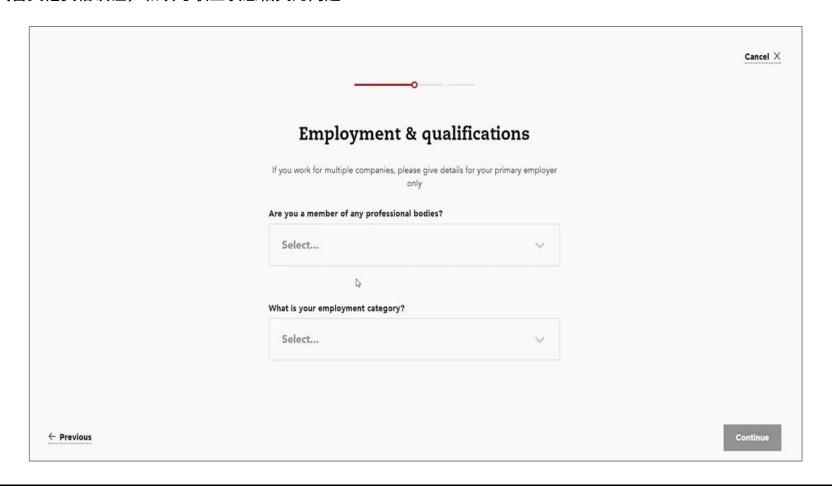




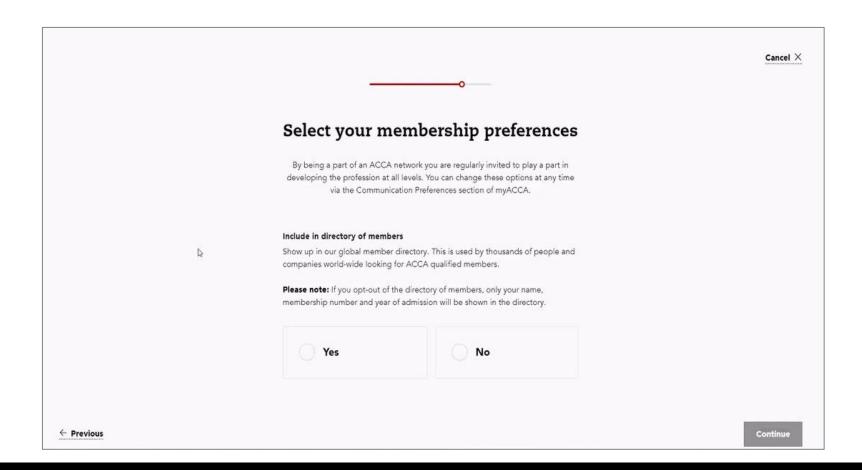
- 按照提示回答几个简单的问题 1. 是否有违法犯罪记录,是否从事执业相关的工作等



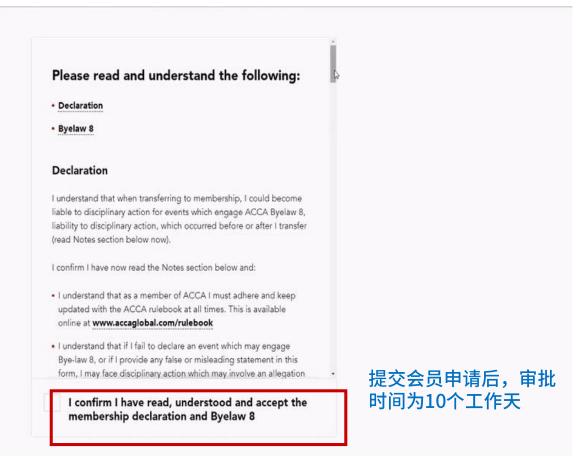
- -按照提示回答几个简单的问题 2. 选择是否同时具备其他资格认证,和填写职业状态相关的问题



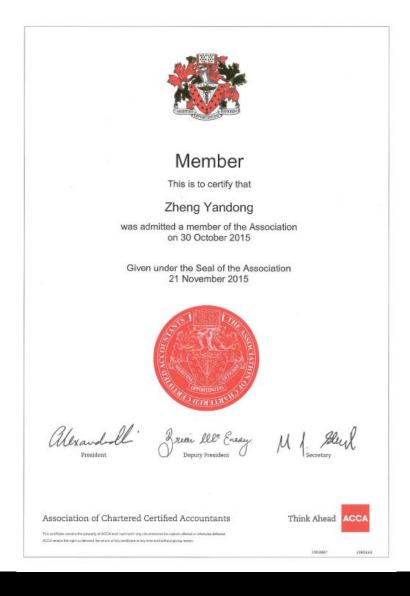
- -按照提示回答几个简单的问题 3. 选择是否在ACCA全球官网公开您的会员信息



-提交会员申请 阅读会员申请声明,并点击已阅读和了解相关条例



ACCA会员证书范例



关于会员证书的邮寄安排

ACCA总部会每隔2个月特制会员证书, 并批量寄到ACCA中国的办公室。各个办 公室收到证书后,会联系会员,并用顺丰 快递给大家寄送。

*请务必把自己正确的联系方式,包括<mark>电</mark> <mark>适和邮箱</mark>更新在myACCA里,否则我们 无法联系本人寄送证书。

Q&A

1. 没考完之前的工作经验算吗?

答: 算,实习与兼职也算。

2. 在A公司工作2年,B公司工作2年,是不是需要两个PES去签字啊?

答:是的。工作经验(时间)需要原公司的HR或Line Manager去确认的。

Performance objectives则可以让同一个PES或不同的PES帮您做确认。

3. 目前正在一家认可的雇主工作,但是不满36个月,可以把Performance objectives全豁免了吗?

答:可以的。假如您觉得您在目前的工作上已经能够体现出您达到9个Performance objectives的要求了,那么您是可以9个全豁免的,也可以申请部分豁免。

4. 国有企业一般以职称为主,尤其是较为年长的Line Manager,高级会计师是否属于IFAC?

答:国内职称并不属于IFAC体系的专业会计师团体,所以不可作为PES的。

5.如果我用PER confirmation form申请PO豁免,那么工作时间需要另外找PES审批吗?

答:当递交PO豁免表,如已经离职或在认可雇主里工作已满36个月,收到表格后,工作时间会一起审批,不用额外找PES审批时间。

6.在我的 "My qualifications"的界面里,没有"Apply for membership"的按钮,怎么办?

答:如果没有这个按钮,您可以选择下载会员申请表,填妥后,以扫描件形式回传至members@accaglobal.com申请。

ACCA 北京办公室

华北区会员微信小助手: ACCANC2

所辖范围:

北京,黑龙江,吉林,辽宁,河北 天津,山东,山西,陕西,宁夏, 甘肃,内蒙古,新疆,青海

ACCA 上海办公室

华中区微信小助手: ACCAPE4

所辖范围:

上海,江苏,浙江,湖北 河南,四川,重庆,安徽,江西,西藏

ACCA 广州办公室

华南区微信小助手: ACCASC

所辖范围:

广东,广西,福建,湖南

云南,贵州,海南



ACCA会员服务号

*加入会员微信群请添加微信小助手,验证信息:会员号+姓名+城市

