Approved Employer PER confirmation form

For trainees employed by an Approved Employer – trainee development stream, Gold or Platinum level

To claim the completion of some or all of the Practical Experience Requirement (PER) performance objectives through the ACCA Approved Employer route, you must complete and return this form to ACCA. Please ensure that all signatures are handwritten or official verified digital signatures. We are unable to accept typed signatures.

Section 1 must be completed by you.
Sections 2 and 3 must be completed by your ACCA Approved Employer primary contact or practical experience supervisor.

The practical experience supervisor must:

- be a member of an IFAC body or a qualified accountant or auditor recognised by law in your country; and
- have knowledge of your work.

A copy of this form must be retained in case it is required by ACCA for PER audit purposes or to validate any claims on your membership application.

DATA PROTECTION

We may use your personal data for the purposes of:

- membership administration and training requirements
- sending you publications and other communications
- responding to enquiries and investigating complaints
- complying with our regulatory obligations.

You can update your information through your *myACCA* account at any time. We may share information with our service delivery partners and our auditors. If you are a trainee, we may also share information with employers, in order to verify details regarding this PER confirmation.

Please note that for individuals based outside the UK and EU, your information will be held in ACCA's main information systems which are located in the UK and EU and may be accessed by ACCA's local office in your country of residence. ACCA processes information within the UK and EU, but may also transfer data outside of the UK and EU as part of its operations and service delivery.

For more information on how your personal information and rights are respected, please access our privacy notice (accaglobal.com/privacy) or contact privacy@accaglobal.com

For residents of China

☐ By filling in this form and ticking the box, I give my consent that ACCA can collect, use, transfer and share the personal information I have entered according to ACCA's privacy notice, to process for the purpose of above mentioned activities only, and possibly provide relevant customer supports or contact me about helping the membership management, or any related industry news, events, career tips and other information relevant to their qualification or to me via the official email address, our monthly e-magazine, potential and relevant events/activities information for your continuous growth.

☐ By filling in this form and ticking the box, I give my consent that ACCA can transfer the personal information I have entered outside the broader of the People's Republic of China, ie to those overseas designated servers owned by ACCA or its partners mentioned below to enable the global services providing to me, all those data transfer will be proceed according to ACCA's privacy notice for the purpose of above mentioned activities only.

You can update your information or opt-out from communication at any point by contacting us. In principle, the personal information we collect will be stored in the main systems/servers we ACCA globally operated. And as we ACCA provides products or services through the global resources and servers, which means, after receiving your consent this time, when part of its operations and service deliveries demand, your personal information may be transferred to the jurisdictions that the product or service being operated, or be accessed from the ACCA local office of these jurisdictions that you are staying, eg your personal information may be transferred and stored on the ACCA main information system located in EU, or your personal information may be handled by ACCA local office of your country of residence registered. ACCA may share your personal information with legally authorized suppliers and internal auditors for their proceeding in order to enable our membership management operations as well. ACCA will not use or process your Personal Information beyond the extent that it is directly or reasonably relevant to the purposes for which it was collected. ACCA may also share your personal information with authorized suppliers and auditors.

For more information on how your information and rights are respected, please see our privacy notice (https://cn.accaglobal.com/privacy/policy.html) or contact privacy@accaglobal.com

1 YOUR WORKPLACE DETAILS

To be completed by the trainee

Full name

Email address

ACCA registration number

Date of birth / /

Organisation name

Approved Employer number

Job title

Dates of employment From: / / To: / /

Months in a relevant role

Percentage relevance of role %

Employer address including postcode

Level of approval (Gold/Platinum)

2 ACCA APPROVED EMPLOYER DETAILS

To be completed by the ACCA Approved Employer primary contact or practical experience supervisor

Full name

ACCA registration number (if applicable)

Job title

Qualifications

Email address

Relationship to trainee

Signature

To be completed by a second practical experience supervisor, if applicable

Full name

ACCA registration number (if applicable)

Job title

Qualifications

Email address

Relationship to trainee

Signature

3 PERFORMANCE OBJECTIVES SUMMARY

To be completed by the Approved Employer primary contact or practical experience supervisor(s)

To be eligible to apply for ACCA membership, trainees must have completed the ACCA exams, the Ethics and Professional Skills module or Professional Ethics module, 36 months in relevant finance/accounting roles and must also have achieved all five Essentials and four Technical performance objectives from the list below.

Please review the performance objective descriptions and elements, which can be found in the ACCA performance objective booklet, then sign and date each performance objective the trainee named in Section 1 has achieved while at your organisation.

	Performance objective	Signature	Date (DD/MM/YYYY)
ESSENTIALS	1 Ethics and professionalism		
	2 Stakeholder relationship management		
	3 Strategy, innovation and sustainable value creation		
	4 Governance, risk and control		
	5 Leadership and management		
TECHNICAL	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		
	11 Identify and manage financial risk		
	12 Evaluate management accounting systems		
	13 Plan and control performance		
	14 Monitor performance		
	15 Tax computations and assessments		
	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		

In addition to achieving the performance objectives signed off above, I confirm that the trainee named in section 1:

- has been employed by this organisation during the dates entered in section 1
- has achieved the number of months in a relevant role claimed in section 1 (to be prorated for part-time experience)
- has followed this organisation's performance management and appraisal processes
- is eligible to claim performance objectives through the Approved Employer route.

Print name

Signature

Date

Submit this form to ACCA by using the 'Help' section within your myACCA account or uploading it during your ACCA membership application.