# ACCA 会员申请指南 2025

更新日期: 2025.03

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# 成为会员的条件?

## How to be member?



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# 成为ACCA 会员的基本条件



✓ Exam 完成并通过13门ACCA专业资格考试
✓ Ethics 完成职业道德与职业技能模块
✓ Experience 录入实践工作经验和记录绩效目标



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# 6

# 完成职业道德与专业技能模块 Ethics and Professional Skills Module(EPSM)

1.EPSM是什么 2.EPSM的模块 3.如何登录EPSM



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### EPSM是什么? 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 Ethics and professionalism

Unit 2 个人效能 Personal effectiveness

Unit 3 沟通交流与人际交往技能 Communication & interpersonal skills

Unit 4 商业意识 Commercial awareness

Unit 5 领导力与团队协作 Leadership and team working Unit 6 创新与质疑精神 Innovation and skepticism

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



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# 登录myACCA, 点击 'My qualification' - 'Launch EPSM'

	Ethics		
C Dashboard	Your ethics module progress	Launch EPSM [2] Ethics module syllabus guides [2]	
<ul> <li>Ges &amp; transactions</li> <li>Documents &amp; downloads</li> <li>A My details →</li> </ul>	<b>O</b> <sub>/1</sub> MODULE If you started EPSM before 17 April 2023 your progress bar may not update until you have fully completed the module	Foundations in Professionalism	扫描上方二维码 查看购买指南一键通



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# 记录工作经验

## Record your experience

1.记录工作经验
 2.添加实践经验导师
 3.关联导师账户
 4.发送工作经验给导师



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## 实践工作经验要求

**Record your experience** 

1. 工作内容与财会领域相关:大部分时间用于会计、财务、审 计和认证有关的活动和任务上,或者税务、破产和鉴证等其他 相关技术领域的活动和任务上。

2. 工作方式:可以是兼职工作、实习工作甚至是部分职责涉及会计和财务方面工作的岗位。

3. 时间:36个月。36个月的实践无须一次性或在同一个岗位/ 一份工作完成。许多类型的工作都可计为PER。甚至包括您在 成为ACCA准会员以前所做的工作。



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### 第一步登录myACCA,点击'Launch MyExperience' Route1



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# 第一步登录myACCA,点击'Record your practical experience' Route2

TUDENT		Your overview	
Dashboard     My qualification     Fees & transactions		S MY QUALIFICATION ACCA Accounting Technician Apprenticeship View progress	■ ACCOUNT BALANCE £137 in debit View transactions [2]
A My details	>	ACCA KEY DATES • Annual subscription due: 1 January 2025 • September exams: 2-6 September 2024 • December exams: 2-6 December 2024	COMMON ACTIONS           Book an exam         Image: Common actions           Print a transcript         Image: Common actions           Print a transcript         Image: Common actions







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# 第二步 添加雇主信息



温馨提示: 已经录入的 经被PES确认	这里显示的是您 时间,而不是已 - 、好的时间 →					
Employment	(		Employer details Please complete the fields b	elow and save and finish		
Add new employer	Manage roles	7 Months	For example Employer name * ACCA	所有信息请用英 带*号都为必填	文字符 <sup>4</sup>	真写
NASA	01/01/2013 - 30/	04/2013	No.1, <u>Tianhe</u> Roa		- <b>X</b>	
- Spaceman (01/01/20	13 - 30/04/2013) - 🏴 🚺	Months	Address line 2	点击 'Save and	l finish'	讲入
ACCA	01/01/2012 - 01/	05/2012	Town / City *	下一步		, <u> </u>
- TM (01/01/2012 - 01/0	5/2012) - 💻 🖪	Months	Guangzhou			
company two	18/10/2010 -	current	Guangdong	注意:实践经验	会师是:	<u>直接</u>
- Admissions Manager	(18/10/2010 - ) - 🏴 🚺	Months	Country *	绑定在每一份工	作经验	里,
company one	31/08/2010 - 31/	08/2010	China Zip code / Post code	所以要先添加和	编辑好风	<u> </u>
- 1 (31/08/2010 - 31/08	/2010) - 🟴 🚺	Months	510620	信息和职位信息	<u>, 系统</u> )	方能
			Save and finish	出现PES的部分	供编辑。	_



# 第二步 添加和编辑职位信息

Employment			Employer name	ACCA
Employment			Address line 1	No.1 Tianhe Road
		7 Months	Address line 2	
Add new employer	lanage roles		Town / City	Guangzhou
B			County / State	Guangdong
🖍 ACCA		-	Country	China, Peoples Rep of
NASA	01/01/2013	- 30/04/2013	Zip code / Post code	510000
- Spaceman (01/01/201	3 - 30/04/2013) - 🏴	3 Months	Edit this employer Del	lete this employe Add new role
ACCA	01/01/2012	- 01/05/2012		
- TM (01/01/2012 - 01/05	5/2012) - 🏴	4 Months	上土建成中	++×:+ )
company two	18/10/2	010 - current		土仁进入,
- Admissions Manager	(18/10/2010 - ) - 🏴	0 Months	自知工作时	
company one	31/08/2010	- 31/08/2010		נייו
- 1 (31/08/2010 - 31/08/	2010) - 💻	0 Months		

#### Role details

Complete the fields below and save and finish.

Remember to confirm the number of hours you work each week and the percentage of your time that's spent on relevant activities. You can only claim a maximum of 35 hours for a full time role.

08/03/2016	
🔳 End date 👩	
DD/MM/YYYY	
Average hours	per weel v
% Relevant role	* 🕥
100	•
ACCA approve	d employe
No	
No <b>Is this an audit</b>	role? *

#### 请如实填写职位信息

包括职位名称,工作开始日期,工 作结束日期,每周平均工作小时, 相关工作的时间占比,是否为认可 雇主,是否涉及审计

#### 注意:

- 1. End date须填写具体的日期, 系统才能计算出总共的工作时 间
- 如有疑问,可点击旁边的问号, 为填空内容的解释

Save and finish

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# 在系统中添加实践经验导师PES Add new supervisor



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# 第三步 添加实践经验导师PES

Employment		Job title Start date	Accountancy Consultant	
Add new employer Manage roles	173 Months	End date Average hours per week	35	
Kennen's Home	05/05/2018 - current	% Relevant role ACCA approved employer?	100 No	
Accountancy Consultant (05/05/2018 - )	12 Months	Is this a lecturing role?	No	
- auditor (29/04/2018 - 02/04/2019)	11 Months 20/04/2017 - 02/04/2019	Edit this role Practical experience s	upervisors	植写并保在职位信息后 在你职位
<ul> <li>auditor (29/04/2018 - 02/04/2019)</li> <li>auditor (20/04/2017 - )</li> </ul>	25 Months	Kennen Feng	Selected supervisor     Add new supervisor     Disabled	信息下方,添加实践经验导师
Accountants Enterprise - The Boss (20/06/2018 - )	20/06/2018 - current 6 Months	<ul> <li>Approve performance objectives</li> <li>Approve time</li> </ul>		

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# 实践经验导师能如何帮助您?

Practical Experience Superisor(PES)

### PES需要帮您在线确认:

- ✓ 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



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# 谁能成为您的实践经验导师?

#### 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.

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	$\checkmark$	$\checkmark$
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	$\checkmark$	$\checkmark$
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		$\checkmark$

\*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/whowe-are/membership

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## 第三步 编辑PES信息

- Se untat (05/09/2020 - 01/01/2023) 27 Months	First Name *	
Bo 05/06/2024 - 06/08/2024		请用英文字符填写
- Bis (05/06/2024 - 06/08/2024) 2 Months	Last name *	
A 14/12/2020 - 14/12/2023	E-mail Address * (?)	姓名,常用邮箱, 与PES的关系(请参照
- / A (14/12/2020 - 14/12/2023) 36 Months		上一页关系叙述),
06/09/2022 - current	Relationship * 🧑	PES的职位名称
- Ac 18/2023 - ) 18 Months	IFAC qualified line manager	填妥后请点击'save and
- ; (06/09/2022 - ) 30 Months		send invite', 糸统会目
At 01/01/2022 - 27/06/2023		初反达一到邀咱邮件到 您的PES
- Acc (01/01/2022 - 27/06/2023) 17 Months	Save and send invite	



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## 第四步 PES收到系统邀请邮件

Dear a' '

You have been nominated by as their practical experience supervisor during their employment at to help them complete their 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=98124849-353C-458A-ACC9-F73C0C35938C

If you've not previously registered or need additional help you can view our step-by-step guides for either <u>ACCA members</u> or <u>non-members</u>. ACCA has lots of resources to help you understand the PER policy and support your trainees in achieving it, find out more at <u>accaglobal.com/per</u>

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. Please contact us directly via accaglobal.com/contactus where we will be happy to help you with any questions or concerns you may have.

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

如无收到,请检查广告/垃圾 邮箱

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# 第五步 PES建立审批账号

Already registered with ACCA?	Not registered with ACCA?
If you have a username and password for My ACCA please login.	Please enter your details to create a My ACCA account.
My ACCA For en your username? For en your password?	First name: *   Last name: *   Email: *   Date of birth (dd/mm/yyyy): *   Create account
in 🛩 🛗 f 🕓	Call us +44 (0)141 582 2000 Contact information for your local office

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。



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# 关联PES账号 Link the account with PES



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Already registered with ACCA?	Sign in to $M_{\rm e}$
If you have a username and password for My ACCA please login.	Sign in to WiyACCA
	Insert your username and password below to access your secure personal MyACCA account. Username
Forgotten rusername? Forgotten rpassword?	Password
	Sign in to MyACCA
	Ecolopiton your username2
	Postpolien your password?
	Having problems signing in?
<b>h</b> You <b>f</b> Call us +44 (0	Keeking your contact and employment details up to date will allow up to contact you and taker our communications to your needs. Remember to saide your changes your maker. Or your personal security you will automatically be togged out of your account after 10 minutes of in activity.

点击左边页面的My ACCA直接进入右边页面,请PES输入7位的ACCA ID和您的账户密码



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登录后,会进入到这个界面,请 确认您的个人信息;

然后点击 'Review and sign-off' 或者 'experience record' 进入 审批页面

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### Supervisor overview

IFAC member body If you're a member of an accountar	ncy body please add your membership details	
Add membership details	请任此上传IFAC相关的资格证书(图 片或扫描件)	
Link with trainee Lilly Laronette has asked you to be Please confirm or amend your rela	their practical experience supervisor. ionship and job title.	×
Pathway	PER 请确认与学员/准会员的职	
Relationship	JFAC qualified line manager 场关系,可参考前文	
Job Title	Accountant	
Confirm and link		

进入审批页面后,PES需要在 此处添加相关资格证书的图片 或扫描件

确认与学员/准会员的职场关系

确认无误后,请点击 'Confirm and link',此处已完成PES账号的关联



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Not registered with A	ACCA? etails to create a My ACCA account.				
First name: * Last name: * Email: * Date of birth (dd/m Create account	nm/yyyy): *	Message sent We have sent a message containing your login details to t My ACCA account creat Please make a note of your new My ACCA username. ACCA Username: 26006333 Please access My ACCA, and use the forgoing password fa	ne address you used to register your ACCA Global Accounted ted as a secure password and complete the reg	unt. gistration process.	
141 582 2	Contact us Contact information for your local office	© 2017 Association of Chartered Certified Accountants (A	Call us. +44 (0)141 582 2000	Contact us Contact information	for your local office
您须按照 这只是一	步骤提示建立一个ACCA账户 -个PES的账户	您的账户已被创建,并通 按要求设置一个安全密码	过邮件获得ACCA ID。 }。	,请点击MyACo	CA链接,

Sign in to MyACCA	Set/Reset your password
Insert your username and password below to access your secure personal MyACCA account.	Enter the username used to register your MyACCA account.
	Username
Password	
	Forgotten your username?
Sign in to MyACCA	
Eorgotten your username?	Set/Reset your password
Forgotten your password?	Back to Sign In
New user - set your password	
Having problems signing in?	

选择"New user – set your password",输 入您的ACCA ID,完成密码设置

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Set/Reset your password	From: Interepty@kam.accaglobal.com To: Co Sublant: Mold/CA Destructed Dest	
Password reset email sent Back to Sign In	Please click on the link below to reset your password. This line https://login.iam.accaglobal.com/#new-password?confirmation 您会看到以上界面信息,并收	hk is only valid for 48 hours. ond=cyms1i7BcrJWPc2ITVNCgraOS7k%3D&lokenkd=rR5sSK8gP8jn5tlsEO4YPEVngc0%3D&usemame=26006333 收到一份带有修改密码链接的邮件,请点击进行密码修改
	Choose your new password Please enter your new password below. Password Re-type password	Choose your new password Password reset Back to Sign In
	Set new password Backs to Stight In	设置一个新密码,确保密码符合安全标准,然后单击 "back to sign in",请使用您的ACCA ID和密码登录。

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登录后,会进入到这个界面,请 确认您的个人信息;

然后点击 'Review and sign-off' 或者 'experience record' 进入 审批页面

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### Supervisor overview

IFAC member body If you're a member of an accounta Add membership details	incy body please add your membership details 请在此上传IFAC相关的资格证书(图 片或扫描件)	
Link with trainee Lilly Laronette has asked you to b Please confirm or amend your rela	e their practical experience supervisor. ationship and job title.	×
Pathway	PER 请确认与学员/准会员的职	Ϋ́
Relationship	JFAC qualified line manager 场关系,可参考前文	
Job Title	Accountant	
Confirm and link		

进入审批页面后,PES需要在 此处添加相关资格证书的图片 或扫描件

确认与学员/准会员的职场关系

确认无误后,请点击 'Confirm and link',此处已完 成PES账号的关联



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# 提交工作经验给PES审批 Claim the time



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# 您需要查询并确认PES的相关状态

Employment	Practical experience supervisors Add new supervisor
173 Months Add new employer Manage roles	显示您的名字 ✓ Approve time
Kennen's Home 05/05/2018 - current	Remove supervisor
Accountancy Consultant (05/05/2018 - )	,
aaa 29/04/2018 - 02/04/2019 - auditor (29/04/2018 - 02/04/2019) を 占主文1 応的职位进入	PES已经接受邀请和绑定账号的状态 右下角显示状态为"Enabled"的时候,代表PES已经和您的账号联结,可以审批工作经验
ABC 20/04/2017 - 02/04/2019	
	Practical experience supervisors
- auditor (29/04/2018 - 02/04/2019) 🞓 🐥 11 Months	
- auditor (20/04/2017 - ) 25 Months	✓ Add selected supervisor Add new supervisor
Accountants Enterprise 20/06/2018 - current	显示PES的名字 Enabled
- The Boss (20/06/2018 - ) 6 Months	<ul> <li>✓ Approve performance objectives</li> <li>✓ Approve time</li> </ul>

笙/A DEC 培平激活的状态



# 第六步 提交工作经验给PES审批





Import approved的工作时间需要PES审核 需要点" claim this time",然后联系PES进行确认。

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# 第六步 提交工作经验给PES审批



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提交后, 请查看您工作经验的状态



# 记录绩效目标 Record your performance objective (PO)

1.进入记录页面

2.点击PO开始记录

3.按element内容撰写 PO的总结

4.提交PO给PES审批



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### 绩效目标PO performance objective (PO)

作为PER的一部分,您将完成绩效目标,以表明您能将通过考试教学大纲习得的知识、技能和 行为运用于真实生活和工作活动。您将通过在日常工作中的实践来达成各目标要素,最终, 通过文字描述把从中所获得的的经验和所开展的工作的实例表述出来,而这将是实践经验导 师进行判断的依据。

您必须完成全部<mark>九项</mark>绩效目标,包括:**所有五项核心能力目标 (必选)**以及**七个技术领域**17 项技术能力表现目标 (17选4)。

每一项PO都由description, element (用以描述所要求的相关技能与经验)和statement组成。 您可以在statement中简单总结您的工作,以及从中得到的反思,由此您的上级就能够判断您 是否已经达到标准了。

写statement的时候,要注意以下几点:

- 简洁明了 1.
- 2.
- 3.
- 避免术语或缩写(可以使用注解) 使用证据和例子去阐述论点 避免信息重复或引用其他statements





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# 第一步 进入记录页面

	Employment Employer: Role: View employment	22 Months
	Performance objectives	0 Completed
点击 'View objectives' 进入页面	View objectives Essentials 5 required	
	1: Ethics and professionalism	Started
	2: Stakeholder relationship management	Started
	3: Strategy and innovation	Started
	4: Governance, risk and control	Started



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# 第二步 点击其中一条PO开始记录



Essentials 5 required	3 Completed
1: Professionalism and ethics	Transferred
2: Stakeholder relationship manag	ement
3: Strategy and innovation	Transferred
4: Governance risk and control	Transferred
5: Leadership and management	
Commodi 4 required	
Corporate reporting 6: Record and process transactions	and events
Corporate reporting 6: Record and process transactions 7: Prepare external financial reports	and events
Corporate reporting 6: Record and process transactions 7: Prepare external financial reports 8: Analyse and interpret financial rep	and events
Corporate reporting 6: Record and process transactions 7: Prepare external financial reports 8: Analyse and interpret financial rep	and events ports
Corporate reporting 6: Record and process transactions 7: Prepare external financial reports 8: Analyse and interpret financial rep Financial management 9: Evaluate investment and financing	and events ports g decisions
Corporate reporting 6: Record and process transactions 7: Prepare external financial reports 8: Analyse and interpret financial rep Financial management 9: Evaluate investment and financing 10: Manage and control working cap	and events ports g decisions ital

	_	
Start objective	点击"开始"	
	· · · · · · · · · · · · · · · · · · ·	

You manage stakeholder expectations and needs, developing and maintaining productive business relationships. You listen to and engage stakeholders effectively and communicate the right information to them when they need it.

#### Elements

Here are the elements you need to achieve for this performance objective

- Display sensitivity, empathy and cultural awareness in all your communications. This allows you to establish trust and credibility with a range of stakeholders and gain their confidence.
- b Use a range of mediums and make appropriate use of IT to communicate clearly, concisely and persuasively in formal and informal situations.
- Gain commitment from stakeholders by consulting and influencing them to solve problems, meet objectives and maximise mutually beneficial opportunities.

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# 第三步 按element内容撰写这项PO的总结

	8 Completed	а	Evaluate management accounting techniques and approaches in an organisation. Waiting for approval
ssentials 5 required		b	Apply appropriate costing techniques to products and services.
1: Ethics and professionalism	Under review	с	Assess and advise on the effectiveness of an organisation's management accounting and ICT systems.
2: Stakeholder relationship management	Started		
Strategy and innovation	Under review	d	Contribute to developing and improving management accounting systems and internal reporting recognising the impact of emerging technologies
Governance, risk and control	AE exemption		iconnologios.
			Manakan and Annala and Annala to an an an and a second second second
5: Leadership and management echnical 4 required Corporate and business reporti	Under review	Sta	atement
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Leadership and management chnical 4 required rporate and business reportin Record and process transactions and events Prepare external financial reports Analyse and interpret financial reports	Under review	e Sta Writt You EC	atement         e a statement of between 200 - 500 words.         r statement is currently 225 words.         dit ▼         J       A ▼ ▲ ▼ ▲ ▼ ▲ ▼ ▲ ■ ■ ↓ □ ▼ ↓ □ ▼ ↓ □ ▼ ↓ □
E Leadership and management echnical 4 required prporate and business reportin E Record and process transactions and events Prepare external financial reports E Analyse and interpret financial reports nancial management	Under review  Dg  AE exemption  AE exemption  Completed	E Sta Vrit You EC B B So So So	wonitor new developments in management accounting and consider their potential impact on performance and systems. atement e a statement of between 200 - 500 words. r statement is currently 225 words. dit ・
5: Leadership and management echnical 4 required orporate and business reportin 5: Record and process transactions and events 7: Prepare external financial reports 3: Analyse and interpret financial reports nancial management 9: Evaluate investment and financing decisions	Under review	E Sta Vritt You Ec B B So So So So So So	The potential impact on performance and systems. atement the a statement of between 200 - 500 words. If the statement is currently 225 words. ati the statement is currently 225 words. ati the statement is currently 225 words. The statement is currently 255 words. The statement is cu
5: Leadership and management echnical 4 required corporate and business reportin 6: Record and process transactions and events 7: Prepare external financial reports 8: Analyse and interpret financial reports inancial management 9: Evaluate investment and financing decisions 10: Manage and control working capital	Under review	Sti Write You Ecc B So So So So So So So	The potential impact on performance and systems. atement the a statement of between 200 - 500 words. If the statement is currently 225 words. ati the statement is currently 225 words. ati the statement is currently 225 words. The statement is currently 225 words. At the statement is currently 25 words. At the statement is curre

12: Evaluate management accounting systems Under review

6 accounting techniques and approaches in <mark>常工作中与该职务有着密切联系的工作事项进行阐述</mark>,切记<mark>不能写套话空话之类</mark>的,如果实在是 Waiting for approval 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。 ng techniques to products and services. the effectiveness of an organisation's ng and ICT systems. 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 ng and improving management accounting porting recognising the impact of emerging 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 ents in management accounting and impact on performance and systems. 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,<mark>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</mark> n 200 - 500 words. ? 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。 25 words 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。 ething somethingsomething somethingsomething 把鼠标移到问号的图标处,会显示要求的详细说明。 ~ ethingsomething somethingsomething ethingsomething somethingsomething ethingsomething somethingsomething V thingsomething somethingsomething something 在这里填入200-500字的总结,然后保存。(注意:少于 Save statement 200字和多干500字都无法提交)

请结合自身职位与日常工作项目进行阐述

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<mark>结合自己在公司的职位以及日</mark>

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# 第四步 提交PO给PES审批

#### 如果您已经完成了所选PO里面 的Statement,您可以直接点 Claim objective提交这一项PO。



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## 第四步 提交PO给PES审批

	6.b Gather information for end-of-period accounting entries – and prepare estimates for adjustments to inter-company accounts.       6.c Verify, input and process routine financial accounting data within the accounting system using emerging technology where appropriate or feasible.         6.d Prepare and review reconciliations and other accounting controls.       6.e Make sure you're using accounting standards and policies when you're processing transactions and events.         Please select a supervisor to send your items to and confirm the role where you gained this experience. You can add an optional comment.         Practical experience supervisor <ul> <li>Select employer - role</li> <li>Select employer - role</li> </ul>	选择对应的PES
	Comments: testing submission Terms and condit submit	Terms and conditions需要阅读后勾选 然后按submit

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# PES如何审批? Approve your PER



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## 第一步 PES登录myACCA- www.accaglobal.com



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# 第二步 PES进入页面审批工作时间



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# 第二步 PES进入页面审批PO

Time Approve claimed time	9: Evaluate investment and financing decisions
Performance objectives	As an internal auditor, I plan the audits which I participate in, as follows: I review the policies in place related to the area being audited and identify the relevant regulations and laws which were applicable to the process. I also consider the requirements emanating from the MFSA's Ethics Framework during the planning of internal audits and investigations. Furthermore, I carry out a risk assessment on the area being audited and hold discussions with the Risk Management function to identify any other
ssentials 5 required	risks associated with the process being audited together with any risk incidents
1: Professionalism and ethics	reported. Following discussions with the both the auditees and the internal audit team, I clearly set and document the objectives and scope of the engagement and
2 Stakeholder relationship management	communicate it to the auditees together with the timeline of the internal audit fieldwork through the notification letter sent by the Head of Internal Audit. Based on the risks
Strategy and innovation	identified by Risk Management, the Function being audited and the internal
: Governance risk and control	expected to be in place and the tests to be carried out during the audit fieldwork. The
5: Leadership and management	audit programme is inputted on the Internal Audit Software together with any attachments obtained, discuss it with the internal audit team and submit it for review by
echnical 4 required	the Audit Manager. I also include on the Internal Audit Software, the dates of the fieldwork and when the draft and final report are to be issued.
orporate reporting	Description Linked evame
Record and process transactions and events	
7: Prepare external financial reports	You advise on alternative sources of finance, and evaluate and review the
8: Analyse and interpret financial reports	financial viability of investment decisions.
nancial management	Elements
9: Evaluate investment and financing decisions	Here are the elements you need to achieve for this performance objective
10: Manage and control working capital	a Advise on the appropriateness and cost of different sources of finance.
11. Identify and manage financial dak	

To be reviewed 意味着该PO正 等待PES审批。PES只需点击对 应的PO,就可以选择页面右上 角的Approve来完成该PO的审 批。

Statement required的意思是学员/准会员暂未完成该PO的statement。

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# 如果您在ACCA认可雇主任职? Working in Approved Employer?





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# 如何搜索认可雇主?

点击 <u>https://www.accaglobal.com/gb/en/help/approved-employer.html</u>





# 如何搜索认可雇主?

#### COMPANY NAME

Professional Development (Single office - Shanghai) Trainee Development - Platinum (Single office - Shanghai) OR Trainee Development - Platinum (Country wide)

- 若Country wide即该雇主全国范围的办公点都有资格作为 认可雇主豁免您的PO;
- 若Single office-Shanghai,即表示只有上海办公点/分公司才有资格作为认可雇主豁免您的PO;
- 所以在后续填写PO豁免表格时先查看能作为认可雇主的范围, 再 填写详细公司地址。
- <mark>只有黄金及白金级培训生发展类(</mark>trainee development)认可雇 主才能为您豁免PO。



#### Performance objective exemption Yes

ACCA trainees may claim a performance objective exemption, however they still need to use their online My Experience to:

- · record that they are claiming the performance objective exemption
- · enter the employment details and employment status
- record progress towards achieving 36 months in a relevant role.

Please check with the employer to confirm whether they want to allow ACCA trainees to claim the performance objectives exemption.

Foundation practical experience requirement exemption No

FIA students are required to record their experience in your FPER My Experience recording tool.

#### The scope of this approval covers the following locations

Location	Department / Function	Valid from
Shanghai, China, People's Republic of		01 January 2019

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## 查询ACCA认可雇主后,如何找到PO豁免表格并填写?



Step 1: 登录myACCA录入工作经验 Step 2: 下载并填写Approved Employer PER confirmation form

如果您正受聘于或曾任职于ACCA黄金级或白 金级培训生发展类(trainee development)认 可雇主,可以在该职业信息里的"ACCA approved employer"里选YES,之后页面会出 现PO豁免申请表,请下载该表。



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## 填写豁免申请表 Approved Employer PER Confirmation Form

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	1 YOUR WORKPLACE DETAILS	
	To be completed by the trainee	
	Full name	
你	Email address	
的	ACCA registration number Date of birth / /	
基	Organisation name	
本 信	Approved Employer number 认可雇主编号	
息	Job title	
	Dates of employment From: To:	
	Months in a relevant role Percentage relevance of role % 在该雇主工作了多少个月	
	Employer address including postcode	
	Level of approval (Gold/Platinum) 填写: 黄金级雇主或白金级雇主	
	2 ACCA APPROVED EMPLOYER DETAILS	
	To be completed by the ACCA Approved Employer primary contact or practical experience supervisor	
PES的	Full name 准会	员提交此表格时, <mark>需要附上PES的</mark>
基本信息	ACCA registration number (if applcable) 如果PES是ACCA会员,请填写注册号	会员证书扫描件。或其他的会员资
	Job title  友证	田 加是新的Lotter of Good
	Qualifications         PES所拥有的资质,如ACCA或CICPA等         1口仰	
	Email address	aing.
	Relationship to trainee PES与您的关系	
	Signature PES签名	
	THINK AHEAD	Public © ACCA

## 填写豁免申请表 Approved Employer PER Confirmation Form

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

必须完成, 全部由PES签名

并签上完成日期

	Performance objective	Signature	Date (DD/MM/YYYY)
	1 Ethics and professionalism		
ESSENTIALS	2 Stakeholder relationship management		
	3 Strategy, innovation and sustainable value creation	1	
	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		
	11 Identify and manage financial risk		
	12 Evaluate management accounting systems		
	13 Plan and control performance		
	14 Monitor performance		
	15 Tax computations and assessments		
TE	16 Tax compliance and verification		
	17 Tax planning and advice		
	18 Prepare for and plan the audit and assurance proc	ess	
	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	PES <mark>签名</mark>	Date <b>签名日期</b>

#### 温馨提醒:

#### 1. 请在对应完成的PO后逐一签名及签上完成日期。

	Performance Objective	Signature	Date (DD/MM/1111)
	1 Ethics and professionalism •	\	
IALS	2 Stakeholder relationship management		
LU S	3 Strategy and innovation		
ESS	4 Governance, risk and control		
	5 Leadership and management		
	6 Record and process transactions and events		and the second se
	7 Prepare external financial reports		0 2022 12.31
	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		
2	14 Monitor performance		
5	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		

#### 2. 请不要22项目标都全部签名及签上日期

ESSENTIALS: 5项目标需要全部逐一签名 TECHNICAL: 请选择其中4项逐一签名

3. 填妥后,请发送扫描版的表格以及PES的IFAC会员 证书扫描件到 info@accaglobal.com,相关部门收到 后,会在10个工作日内回复。

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# 在哪里提交会员申请?

## Apply for membership



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## 登录myACCA,在线提交会员申请

Deborah Ragoonath-Rajkumar	MY QUALIFICATIONS		
<ul> <li>① Dashboard</li> <li>② My qualification</li> <li>② Fees &amp; transactions</li> <li>③ Documents &amp; downloads</li> <li>◇ My details</li> </ul>	<b>Exams</b>		<ol> <li>登录myACCA</li> <li>点击 'My qualification'</li> <li>点击 'Apply for membership'</li> <li>请注意, 'Apply for membership' 只能 点击一次, 请确保符合所有成为会员的 条件后再点击。</li> </ol>
Help Logout https://mjacastett2.accaglobal.com/W/apply-for-membership	Your exam progress	Book an exam 💋 wnload exam transcript 🗉	







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### 在线提交会员申请



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- 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

		1 •	
	Bet	ore we begin	
是否有违法犯罪行为	Do you have any previous cautions or convictions? Please note the UK Rehabilitation of Offenders Act 1974 doesn't apply to the accountancy profession. You are required to disclose all convictions and/or cautions, including those that are spent, provided that they are not 'protected'.		
	Yes	○ No	
D.			
是否从事执业相关的工作	Do you currently engage in public practice? Are you signing or producing accounts/reports/certificates/tax returns concerning persons or organisations financial affairs that may be relied upon by a third party? ACCA's full definition of public practice can be found by clicking <b>here</b> This does not apply to you if you are an employee within public practice		
	Yes	No	

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### 在线提交会员申请

-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

		Cancel ×
	Employment & qualifications	
	If you work for multiple companies, please give details for your primary employer only	
<ul> <li>是否同时具备其他财会专业资 格认证,比如HKICPA,注意: CICPA(中注会)请选择 "Other Qualifications"</li> </ul>	Are you a member of any professional bodies? Select	
	D <sub>2</sub>	
<ul> <li>选择相应的职业状态比如: Full time 全职学生 Industry/</li> </ul>	What is your employment category?	
Commerce 工商业界, Public Practice 事务所等公共实务;	Select V	
← Previous		Continue



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#### -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

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### 在线提交会员申请

### -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



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### 填写表格提交会员申请

- 曾经提交过在线会员申请但未通过,或无法打开在线会员申请页面?
- 打印并填写会员申请表,将扫描件发送至members@accaglobal.com

https://www.accaglobal.com/content/dam/ACCA\_Global/affiliates/Forms/acca-membership-application-form.pdf

• 总部会在10个工作日内邮件回复审核结果



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### ACCA会员及资深会员FCCA证书范例



#### 关于会员及资深会员证书的邮寄安排

成为ACCA会员和资深会员后证书会批量 寄到中国办公室,我们会先联系您再用顺 丰寄送给您。

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

说明:成为ACCA会员后,连续5年账户状态良好(期间未被除名过),ACCA会员将自动转换为FCCA(ACCA资深会员)。

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Q&A

1. 没考完之前的工作经验算吗?

答:算,实习与兼职也算。兼职工作获得的经验只能根据按比例的方式计入为申请ACCA会员而需达成的PER。您将会被要求 将您在岗位上一周工作的小时数录入"My Experience",然后您的工作时间会自动计算出来。因此,建议您尽量获得具有相关 性、获得指导的符合PER的全职工作经验\*。

\*作为一项指导原则,ACCA将全职工作经验定为每周35小时。1540小时的兼职工作等于12个月的全职工作经验。其中将年假 等剔除。

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。



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Q&A

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:需要的。如果您所在的ACCA认可雇主拥有trainee development 资质,您可以通过填写免PO申请表 (Approved Employer PER confirmation form) 申请PO的豁免。在培训生类认可雇主工作超过36个月的请按照以下步骤完成会员申请1、先登录 myACCA登记这36个月工作时间。登记步骤请看以下指南

https://www.accaglobal.com.cn/content/dam/acca/member/files/2025/01/2025-Membership-Application-Guide.pdf2、下载并 填写Approved Employer PER confirmation form https://www.accaglobal.com.cn/content/dam/acca/email/files/Approved-Employer-PER-confirmation-form.pdf3、找一位您的上级(持有ACCA或者其他国际会计师联合会(IFAC)机构的会员)帮您 在打印版的表格上签字确认 4、发送扫描版的表格以及PES的IFAC会员证书扫描件到 info@accaglobal.com 5、等待总部回复 (一般5个工作日内),并根据回复指引在myACCA操作申请会员即可。

6.我需要一次性完成所有的Performance Objectives (PO) 吗?

答:关于Performance Objectives的完成,您可以根据自己的进度和实际情况,可以一次性完成,也可以分批次完成。

7.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。







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电话: 400 6848 666 / 400 8333 338 Contact us: https://forms.accaglobal.com/contact-us 工作时间: 星期一至星期五: 8:00 - 20:00



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