



How to Guide

How to access and complete the CPD / TP Annual Declaration on SAICA Member Portal

version 0.2

11 November 2021

confidential, limit distribution, controlled



Table of Contents

1. Document Summary	3
1.1 Objective	3
1.2 Learning Outcomes	3
2. How to access and complete the CPD / TP Annual Declaration on the SAICA Member Portal	4
2.1. CPD / TP Annual Declaration by SAICA member or associate.	4
2.1. How to upload evidence when you are selected for monitoring.	11
2.2. How to edit the declaration.	15

1. Document Summary

1.1 Objective

This How to Guide has been produced to guide SAICA members and associates through the steps required for 2021 CPD / TP Annual declarations on the SAICA Member Portal.

1.2 Learning Outcomes

The following is covered in this How to Guide:

- a. How to submit a CPD / TP annual declaration;
- b. How to upload CPD / TP evidence;
- c. How to edit a CPD/TP annual declaration?

2. How to access and complete the CPD / TP Annual Declaration on the SAICA Member Portal

2.1. CPD / TP Annual Declaration by SAICA member or associate.

STEPS	ACTIONS
1.	Visit Member Portal and capture the email address you used to create your profile, in the Email Address field.
2.	Enter your password in the Password field.
3.	Click the Sign in button.

The screenshot shows the SAICA Member Portal Dashboard. The left sidebar contains navigation links: Dashboard, Profile, Queries, Member Compliance, and Logout. The main content area includes sections for 'My Details' (personal and physical addresses), 'Membership' (active from 1985/01/01), and 'Recent Queries' (a table with columns: CASE NUMBER, CATEGORY, STATUS, CREATED DATE, RESOLVED DATE). A red arrow points to the 'Member Compliance' link in the sidebar.

STEPS	ACTIONS
4.	Once you see the Dashboard screen displayed as shown above, click the Member Compliance option in the left panel.

The screenshot shows the SAICA Member Portal Member Compliance section. The left sidebar contains navigation links: My Account, Annual Declaration, and Evidence. The main content area includes a 'CPD Declaration' table with columns: CPD PERIOD, TYPE, DATE DECLARED, STATUS, ACTIONS, and SELECTED FOR MONITORING. A red 'DECLARE' button is visible in the ACTIONS column.

5.	In the Member Compliance section, click the DECLARE button to open the declaration form.
----	---

Annual Declaration
Evidence

CPD Declaration

1
2

CPD Declaration
Review & Submit

By completing and submitting this CPD Declaration, I, as the deponent, acknowledge that the facts contained therein and the declarations made fall within my personal knowledge and belief, are true and correct and I furthermore also understand the contents of this declaration.

General Information

1. Please confirm your personal details (Note: Please update your personal information on the SAICA [Member portal](#))

First Name
Mapula

Preferred Name (for emailing purposes)

Surname
Hill

Initials

The CPD Declaration screen will then display a form containing your general information.
Note the **General CPD Requirements** listed below.

General CPD Requirement

Note: SAICA will, on a sample basis, verify members'/ associates compliance to the CPD policy. Members'/ associates who are selected for the monitoring process will be advised of the deadline to submit their reflective plans.

The SAICA CPD policy requires all members'/ associates to submit an annual declaration.

***Members'/ associates who are required to fulfil certain additional requirements set out by an external regulator operating in the specialist area in which the member is working, must take responsibility for satisfying the obligations for continued registration with the regulator body. It is the members'/ associates responsibility to meet both SAICA and the other regulatory bodies requirements.**

- Tax practitioners are required to obtain at least 15 hours of tax-specific CPD (at least 9 hours MUST be verifiable). No exemption will be granted to members'/ associates for the 15 hours' tax specific CPD requirement.
- Business rescue practitioner are required to comply with a minimum of 20 relevant CPD hours for a calendar year, of which 12 hours must be verifiable (from the 12 hours, 4 hours must be directly related to business rescue) and 8 (verifiable/ non verifiable) hours must be completed during each calendar year.
- Registered Auditors are required to complete a minimum of 3 hours of relevant learning and development activities on ethics.

***Members'/ associates who are not professionally active** need to confirm on the annual declaration and there is then no expectation that any other aspects of the CPD policy need to be met (i.e. drawing up a reflective learning plan and undertaking relevant learning interventions).

Definition of professionally active:

An activity requiring accountancy or related skills undertaken by a professional accountant, including:

- Auditing, review, other assurance and related services
- Accounting
- Tax
- Management Consulting; and
- Financial Management

A professional accountant working in areas such as commerce, industry, service, the public sector, education, the not-for-profit sector, or in regulatory or professional bodies, who might be an employee, contractor, partner, director (executive or non-executive), owner-manager or volunteer

A professional accountant, irrespective of functional classification (for example, audit, tax or consulting) in a firm that provides professional services. The term "professional accountant in public practice" is also used to refer to a firm of professional accountants in public practice.

2. Please select the applicable answer:

I confirm that I am professionally active ☒ Yes ☐ No

3. Formal Recognition Agreement

I confirm that I belong to another professional body with which SAICA has a formal recognition agreement ☐ Yes ☐ No

CPD COMPLIANCE DECLARATION

4. I, as deponent do hereby confirm that during the 2020 SAICA membership period (i.e. 1 January to December 2020)

I confirm that I have identified the competencies (knowledge, skills, attitudes and behaviors) required to perform my current role ☐ Yes ☐ No

I confirm that I have documented my personal learning needs in a reflective and development plan ☐ Yes ☐ No

I confirm that I have undertaken relevant learning interventions as detailed on my reflective plan ☐ Yes ☐ No

I confirm that I have COMPLIED with SAICA CPD policy requirements for 2020 ☐ Yes ☐ No

Declaration

5. I, as deponent do hereby confirm that during the 2021 SAICA membership period (i.e. 1 January to December 2021)

[I confirm that I have read the SAICA Code of Professional Conduct and complied with its requirements for the year ending 31 December 2021](#) ☐ Yes ☐ No

My membership with any other recognized professional body has not been terminated within the last five years as a result of misconduct ☐ Yes ☐ No

I have not been convicted of theft, fraud, forgery or issuing a forged document or committed offence in the last five years ☐ Yes ☐ No

Members/Associates queries relating to the annual declaration may be logged on SAICA [Member Portal](#)

Whenever you answer a question with **No**, in the Declaration section, a text field will display, allowing you to enter additional information.

Members/associates queries relating to the annual declaration may be logged on the [Member Portal](#).

2. Please select the applicable answer:

I confirm that I am professionally active Yes

3. Formal Recognition Agreement

I confirm that I belong to another professional body with which SAICA has a formal recognition agreement No

CPD COMPLIANCE DECLARATION

4. I, as deponent do hereby confirm that during the 2021 SAICA membership period (i.e. 1 January to December 2021)

I confirm that I have identified the competencies (knowledge, skills, attitudes and behaviors) required to perform my current role Yes

I confirm that I have documented my personal learning needs in a reflective and development plan Yes

I confirm that I have undertaken relevant learning interventions as detailed on my reflective plan Yes

I confirm that I have COMPLIED with SAICA CPD policy requirements for 2021 Yes

Declaration

5. I, as deponent do hereby confirm that during the 2021 SAICA membership period (i.e. 1 January to December 2021)

I confirm that I have read the SAICA Code of Professional Conduct and complied with its requirements for the year ending 31 December 2021) Yes

My membership with any other recognized professional body has not been terminated within the last five years as a result of misconduct Yes

I have not been convicted of theft, fraud, forgery or issuing a forged document or committed offence in the last five years Yes

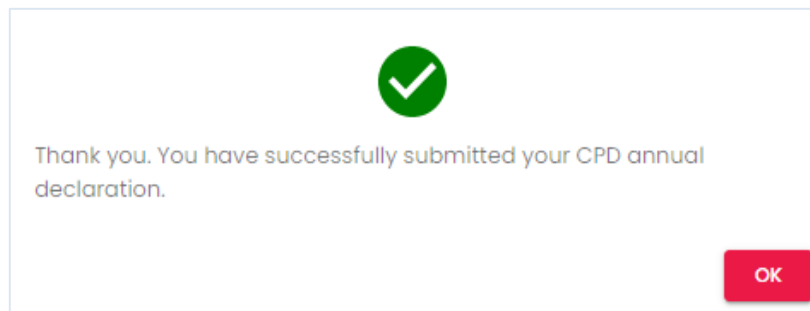
Members/Associates queries relating to the annual declaration may be logged on SAICA [Member Portal](#)

SAVE FORM AS PDF
BACK
SUBMIT

Once you have answered all the declaration questions, click the **Submit** button.

Note: If you do not complete a mandatory field, the form will highlight any missing information and you will not be able to submit your declaration.

STEPS	ACTIONS
6.	Click the Submit button.
<div> <p>Confirm?</p> <p>Would you like to Proceed further?</p> <div> CANCEL YES </div> </div>	
7.	Click the Yes button to proceed.



STEPS	ACTIONS
8.	Click the OK button.

CPD Declaration:

CPD PERIOD	TYPE	DATE DECLARED	STATUS	ACTIONS	SELECTED FOR MONITORING
2020/01/01 - 2020/12/31	CPD	2021/06/17	Submitted	VIEW	No
2020/01/01 - 2020/12/31	Tax Practitioner	2021/06/17	Draft	EDIT	No
2021/01/01 - 2021/12/31	Tax Practitioner	YYYY/MM/DD	Draft	DECLARE	No
2021/01/01 - 2021/12/31	CPD	YYYY/MM/DD	Draft	DECLARE	No

New Query

The status of your declaration will be updated to **Submitted**. You will no longer be able to edit the declaration, you will only be able to view it.

Subject line: We have received your CPD Compliance Declaration

Dear Member

Thank you for completing and submitting the 2021 SAICA CPD Compliance Declaration. We hereby confirm receipt of your declaration.

SAICA will review your declaration and will notify you should any further information be required in relation to your CPD Compliance.

Thank you for your continued support.

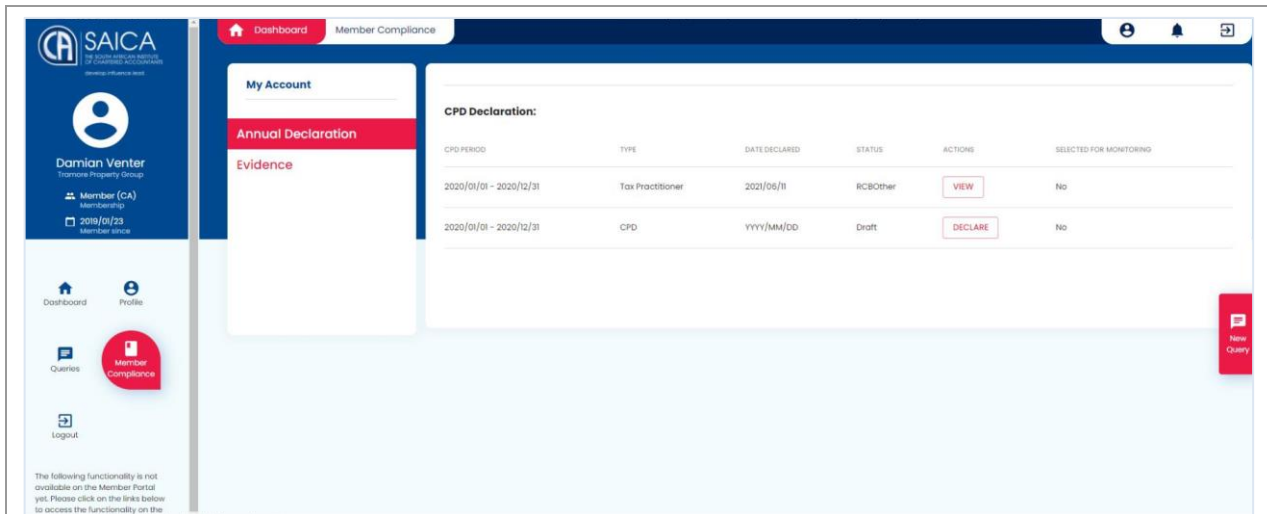
Kind regards

The Member Compliance team

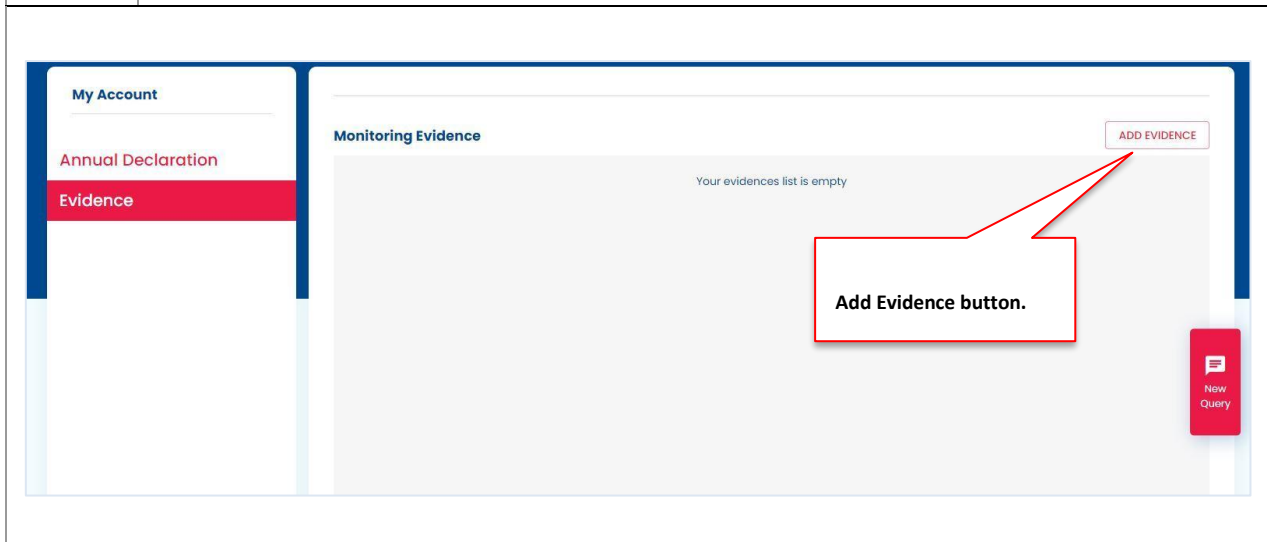
On submission, you will receive an automated email, acknowledging the submission of your declaration. An example of the email is displayed above.

2.1. How to upload evidence when you are selected for monitoring.

Should you be selected for monitoring and upon receiving a CPD / TP monitoring selection notification email, you will need to log on to the Member Portal and upload evidence against the declaration for the current declaration period. This applies for all members and associates.

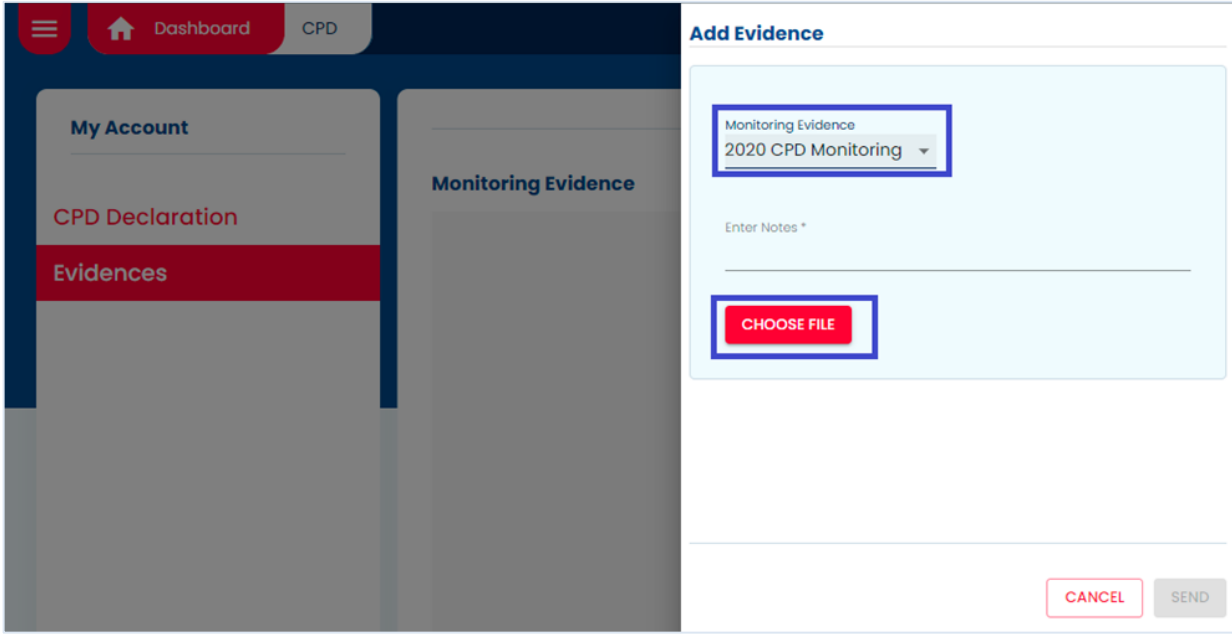


STEPS	ACTIONS
1.	Login to the Member Portal at Member Portal and click on the Member Compliance button in the left panel.
2.	Click the Evidence link, which can be found under My Account section.



3.	When you see the Monitoring Evidence screen, as shown above, click on the Add Evidence button.
----	--

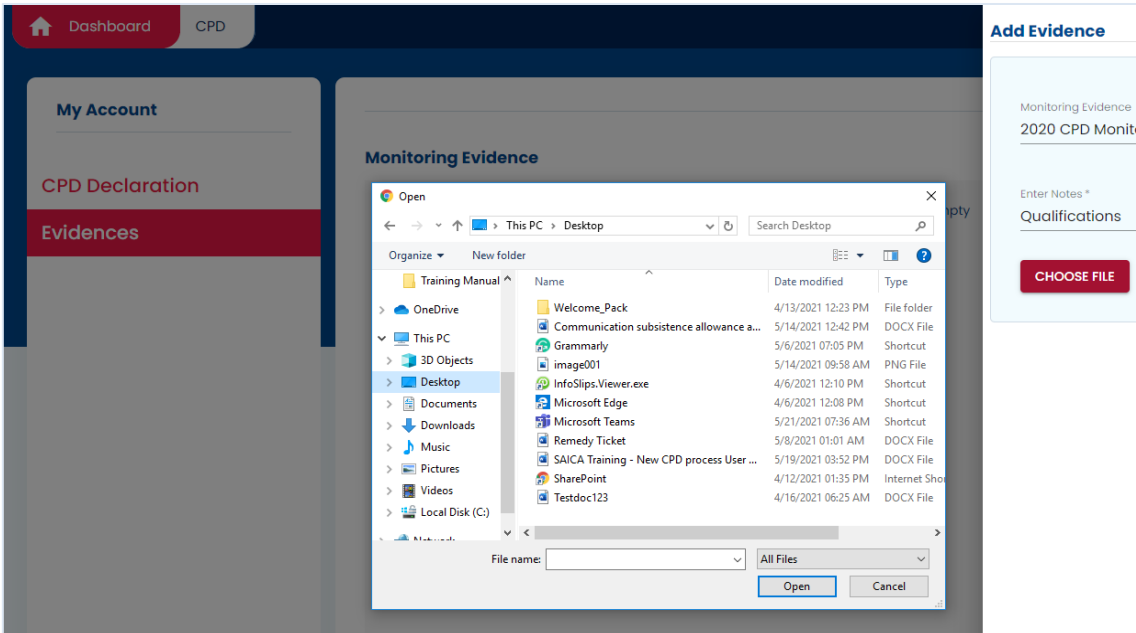
STEPS	ACTIONS
4.	In the Add Evidence window, select the declaration year from the CPD / TP Monitoring Evidence dropdown list.
5.	Capture your notes in the Enter Notes field.



STEPS	ACTIONS
6.	Click the Choose File button.

Once you have selected the monitoring year, the **Choose File** button will become available.

Note that you will not be able to upload evidence after the due date for submission of evidence has passed.



7.	Select the document to attach and click the Open button.
----	---

STEPS	ACTIONS
8.	Once the file is uploaded, click the Send button on the bottom right of the screen to submit the evidence.

You can upload *multiple files* as evidence against the CPD / TP monitoring.

File types: *pdf, docx, images, ppt, zip and excel*.

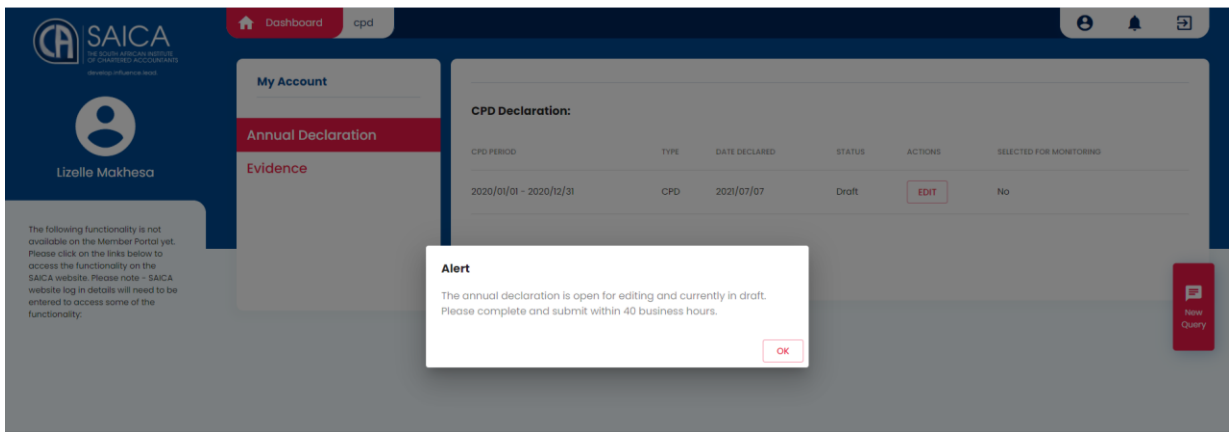
The **Monitoring Evidence** screen will display all the added evidence.

Note that you can view, edit and/or delete the evidence you uploaded. You will not be able to edit or delete the evidence after the deadline has passed.

2.2. How to edit the declaration.

If you have submitted an incorrect declaration or are contacted by SAICA to confirm information on your declaration, the declaration form will be made editable for the member to re-submit.

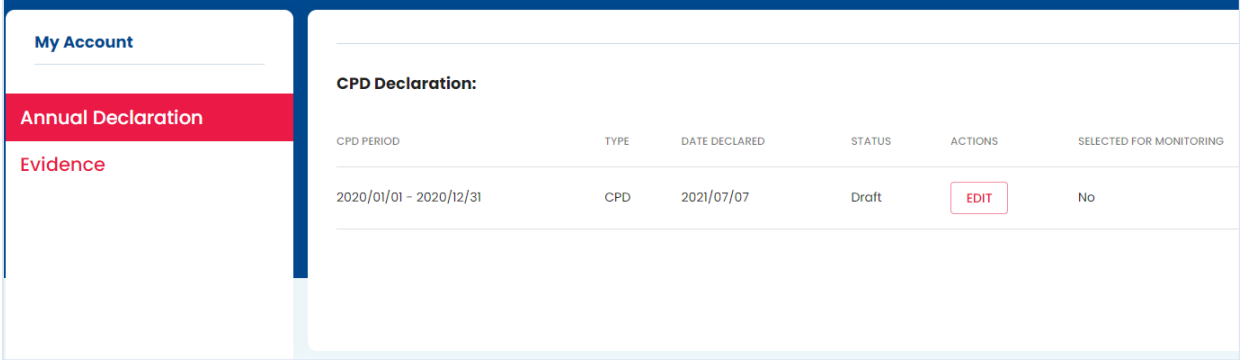
When you log into the Member Portal, an alert pop-up message will display, as shown below.



The screenshot shows the SAICA Member Portal interface. On the left, the user profile for Lizelle Makhese is visible. The main content area displays a table for CPD Declarations. An alert pop-up is centered on the screen, indicating that the annual declaration is open for editing and currently in draft status, with a 40-business-hour deadline.

CPD PERIOD	TYPE	DATE DECLARED	STATUS	ACTIONS	SELECTED FOR MONITORING
2020/01/01 - 2020/12/31	CPD	2021/07/07	Draft	EDIT	No

STEPS	ACTIONS
1.	Click the OK button.



This detailed view of the CPD Declaration table shows the same data as the screenshot above, with the 'EDIT' button highlighted in red.

CPD PERIOD	TYPE	DATE DECLARED	STATUS	ACTIONS	SELECTED FOR MONITORING
2020/01/01 - 2020/12/31	CPD	2021/07/07	Draft	EDIT	No

Note the Declaration Status is updated to **Draft**, and the declaration is opened to be edited, allowing you to submit evidence to support the rectified declaration response. You will receive an automated email, acknowledging the submission of your declaration.

When you click the **EDIT** button on the CPD / TP Declaration screen, the declaration will be opened for you to complete the questions again.
You will also be able to add evidence.

Please note the below when editing your declaration:

- When your compliance status has changed from self-declared non-compliant to self-declared compliant for **CPD**; you should upload the **Reflective plan**.
- When your compliance status has changed from self-declared non-compliant to self-declared compliant in the tax practitioner declaration question: ***'I complied with SAICA's code of professional conduct (i.e., ethics code) and was tax compliant in all material respects in the conduct of my personal tax affairs on the date of this declaration'***; you should upload your **Tax Compliance status** as evidence to support the rectified declaration.
- When your compliance status has changed from self-declared non-compliant to self-declared compliant to the tax practitioner declaration question: ***'I have not been convicted of theft, fraud, forgery or issuing a forged document or committed a dishonest offence in the last five years'*** or ***'I have not been convicted of nor am I an accused of a serious tax offence within the last five years'***, you should upload a **Police Clearance Certificate** (If you do not receive the PCC by the due date for submission, you will be required to furnish a copy of the application for your PCC, noting the date on which you made the application) **or a report from a reputable criminal record checking company** as evidence to support the rectified declaration.
- When your compliance status has changed from self-declared non-compliant to self-declared compliant to the tax practitioner declaration question: ***'I have/will have attained at least 15 hours of tax-specific CPD in the 2021 SAICA membership period for purposes of being a tax practitioner (pro rata for lesser period), of which 60% is verifiable, and maintained relevant records for all tax-specific CPD hours'***, you should upload the **evidence of compliance with the 15 hours (including 9 verifiable hours) tax-specific CPD requirement for the 12-month period, 1 January 2021 to 31 December 2021** or **commissioned affidavit stating that you did not provide tax services for a fee** to support the rectified declaration.
- When you change the response from **'Yes'** to **'No'** to the tax practitioner declaration question: ***'Are you aware of or have you received a letter from SARS indicating SARS' intention to deregister you as a tax practitioner due to non-compliance, in terms of section 240(3)(d) of the Tax Administration Act, 2011'***, you should upload the **Tax Compliance status** to support the rectified declaration.

I confirm that I have COMPLIED with SAICA CPD policy requirements for 2021 ☒ Yes ☐ No

Declaration

5. I, as deponent do hereby confirm that during the 2021 SAICA membership period (i.e. 1 January to December 2021)

[I confirm that I have read the SAICA Code of Professional Conduct and complied with its requirements for the year ending 31 December 2021](#) ☒ Yes ☐ No

My membership with any other recognized professional body has not been terminated within the last five years as a result of misconduct ☒ Yes ☐ No

I have not been convicted of theft, fraud, forgery or issuing a forged document or committed offence in the last five years ☒ Yes ☐ No

Reflective Plan

No file chosen

Members/Associates queries relating to the annual declaration may be logged on SAICA [Member Portal](#)

Members/associates queries relating to the annual declaration may be logged on the [Member Portal](#).