THE TECHNICAL SKILLS REVIEW – Guidelines for Completion

1. The TSR is used as a mechanism for the trainee to put forward (and receive feedback on) evidence in support of their abilities to perform the required technical tasks in terms of the training model.

2. It is a self-evaluation by the trainee that is then reviewed and independently rated by the trainee's "Reviewer" (who is usually their immediate senior - the person to whom they were directly responsible for the performance of the task at hand).

3. Reviewers need to specify the overall level of complexity of the assignment (Advanced or Basic) to provide trainees with an idea of that assignment's overall perceived level of complexity. Note however that this overall level of complexity is simply a guide. **Individual tasks performed will each need to be considered as to whether the evidence presented is at an advanced or basic level.** It is quite possible that there will be some basic tasks within an assignment that is generally (at an overall level) rated to be advanced. It is also possible that there may be advanced tasks performed within an assignment that is generally regarded as basic. It is the individual tasks with their associated ratings of competence and indicated levels of complexity that are transferred through to the ANA every 6 months.

4. The TSR focuses on a trainees "ability to do" and not on their "understanding". A trainee's understanding is tested formally through the education process and a trainee's ability to perform a competency at a sufficiently high standard to meet the entry level requirements into the profession (level 4) will require an adequate understanding (which may therefore be assumed).

5. The initiation of this document is the responsibility of the trainee. One of the pervasive tasks (PA 7) specifically requires that trainees demonstrate their ability to "take responsibility for their own development". Them driving the assessment process is seen to be a fundamental component of this pervasive task and Training Offices may struggle to sign off on their trainee's competence in PA7 if their trainees do not initiate these documents by the due dates.

6. Trainees need only complete those sections of the document in respect of tasks for which they wish to receive formative assessment of their competence thereat. Trainees should however note that the absence of expected evidence could well be seen as an indicator of a lack of competence. Trainees should also note that once they have initiated a TSR, there is nothing to prevent a Reviewer from including a rating of their assessment of a trainee's competence in a task that the trainee was involved in and yet had chosen not to rate themselves on.

7. Trainees are required to reflect on, and document, any professional (pervasive) skills that they utilised to be able to perform the technical tasks that they undertook. These documented tasks should bear a direct correlation to the list of SAICA prescribed pervasive skills and while there is no specific requirement that these be included in the PSR, trainees should be conscious of the potential to include evidence of their abilities in the pervasive skills when documenting this reflection in the TSR.

8. At a minimum, trainees must initiate and complete at least one TSR form DURING every two months. Trainees should complete the TSR document timeously after having completed all responsibilities associated with an assignment (it is suggested that the form should be completed within 2 weeks from the end of the assignment). This is the minimum requirement and Training Offices may wish to specify a more regular requirement for completion. The more frequently the document is completed, the more frequently a trainee receives feedback on his competence and thus the greater the opportunity for them to identify and work on their own developmental need

areas. There is also no doubt that the more evidence there is of the trainee's ability to perform a task, the easier it is to evaluate their competence during the ANA.

9. Notwithstanding the previous point above, this document may either be completed:

    a) at the conclusion of a specific assignment or task, or

    b) at the end of a time period during which numerous small assignments relating to that task were undertaken, or

    c) at the end of a set time period (monthly, for example), regardless of the work performed during that month.

10. Although not always the case, trainees in a public practice training environment are more likely to complete the TSR on a job-specific basis while trainees in a commercial training environment are more likely to complete it on a time basis.

11. Where a Reviewer disagrees with a trainee's rating of their competence in a task, it is important for the Reviewer to provide adequate justification in support of their rating. This justification should not simply be a reference to the decision tree but would also need to include specific reference to which aspects of the job caused the rating. For example, it would be inappropriate for the Reviewer to simply make reference to the fact that the "trainee required guidance" or that "there were several fundamental errors in the work". Reviewers would need to make specific mention of the nature of the guidance received or of the errors that they believed were fundamental. Properly documented Reviewer comments will go a long way to minimising the need for trainees to then have to discuss these differences with their Reviewers.

12. IT IS STRONGLY RECOMMENDED that at the commencement of any assignment about to be undertaken by a trainee, their Reviewer should highlight to them which particular SAICA tasks they are about to be exposed to. This may help to focus the trainee's mind on the fact that they now have an opportunity to demonstrate their ability in certain tasks that will assist in their demonstration of overall competence. Further to this, prior to the start of any new engagement, a trainee should reflect on what opportunities this engagement might present to them in terms of their ability to demonstrate their overall competence. This may well include reflecting back on their last ANA meeting and on whether or not there were any developmental needs identified at that meeting that they may now be able to work on in the upcoming engagement.

13. Reviewers must review the TSR form timeously after the trainee has completed the form (it is suggested that forms should be reviewed within three weeks from when they are completed by the trainee). Trainees must finalise and sign the TSR form timeously after the reviewers have completed the review (it is suggested that forms are finalised and signed off by the trainee within two weeks from the date of review).