

WELCOME TO TRAINING CONTRACT MANAGEMENT SYSTEM

# Otcms



# This presentation covers the following aspects of TCMS

Roles on TCMS

The dashboard

View contract functions

New registration

Discharge

Cancellation

Remission : Academic Remission

RPL remission

- Under a previous SAICA training contract
- Not under a previous SAICA training contract

Suspension

Return from suspension

Extension

Download certificates for new registration / discharge / completed / cancellation

Adding a training office administrator

Removing a training office administrator

Manage Invites

Reporting

## ROLES ON TCMS

- Training office administrator:  
All activities except discharge
- Training officer:  
All activities including discharge
- Trainee:  
Various activities
- SAICA:  
Various approvals  
Allocation of payments
- IRBA:  
Approval of Auditing & Assurance contracts



## DASHBOARD

- The dashboard displays actions in TCMS which need attention, such as applications in progress, suspension requests, remission requests, cancellation requests, extension requests and reverted requests.
- By clicking on the item on the dashboard the user is directed to that action.
- When an action such as a contract request or suspension etc is reverted back to the trainee, the trainee must select the revert option on the dashboard, the trainee will be directed to the action to fix, the trainee may then re-submit the request for approval.



## VIEW CONTRACT FUNCTIONS

- Log into TCMS
- Select “Contract Management” from the menu options
- Select “view contract”
- Click on filter –the filter has been defaulted to active training contracts, click on the word active to see further statuses.
- The filter allows you to view the “state” of the training contract. When the required state is selected from the list, only those training contracts with the selected state will be returned
- If no filter is selected all training contracts can be viewed
- The search facility allows searching by ID number, surname and SAICA ID
- To select a specific training contract click on the view button next to the contract details



# View training contracts

TCMS Dashboard

192.168.200.9:100/Secure/ManageContracts.aspx

## Contracts

All Contracts   Contracts On Hold

Search

Specify training office filter: No Filter

Specify status filter: Active

Training Office	Start Date	End Date	First Name	Last Name	ID Number	SAICA ID	Status	
PricewaterhouseCoopers, Northern Cape, Kimberley, 03049182	2013-02-01	2016-01-31				30656563	Active	<a href="#">View</a>
Nexia Cape Town, Western Cape, Century City, 03039321	2013-02-01	2018-01-31				30659495	Active	<a href="#">View</a>
John Lightfoot, Western Cape, Tokai, 20014318	2014-01-01	2018-12-31				30668987	Active	<a href="#">View</a>
Nolands JHB Inc, Gauteng, Pinetown, 03040761	2013-01-18	2016-01-17				20034549	Active	<a href="#">View</a>
BDO South Africa Incorporated, KwaZulu-Natal, La Lucia, 03034561	2012-01-30	2015-01-29				20054648	Active	<a href="#">View</a>
Ernst & Young Registered Auditors Inc, Gauteng, Northlands, 03041321	2013-01-02	2016-01-01				30656133	Active	<a href="#">View</a>
LDSW Chartered Accountants, Free State, Fichardtspark, 08245501	2013-09-16	2018-09-15				30666427	Active	<a href="#">View</a>
Deloitte and Touché, Western Cape, Cape Town, 03037171	2012-01-01	2014-12-31				20052393	Active	<a href="#">View</a>
Deloitte and Touché, Gauteng, Woodmead, 03037421	2012-01-01	2014-12-				20053362	Active	<a href="#">View</a>

07:50 AM



# Filter for states of training contracts

The screenshot shows a web browser window titled "TCMS Dashboard". A filter menu is open, displaying a list of contract states. The states listed are:

- Awaiting Saica Approval
- Cancelled
- Completed
- Contract Requires Action
- Declined
- Discharge Pending
- Discharged
- Requested Contract Cancel
- Requested Contract Data Modification
- Requested Contract Discharge
- Requested Contract Remission
- Requested Contract Suspend
- Requested Contract Suspend Return
- Requested Unilateral Cancel
- Suspended

A "Close" button is located at the bottom right of the filter menu. The browser's address bar is empty, and the Windows taskbar at the bottom shows the time as 07:49 AM.



# View a specific contract

The screenshot displays a web browser window titled 'TCMS Dashboard'. The main content area shows 'Contract Details' for a specific contract. The details are as follows:

Field	Value
Status:	Active
Start Date:	2012-02-01
End Date:	2015-01-31
Term (in years):	3
Duration (in months):	36
Work Attendance Hours:	4500
Core Experience Hours:	3600
Achieved Educational Qualification:	
Qualification:	BCom(Accounting)
Type:	ACCDEGREE
Completion Date:	2011-12-01
Institution:	University of Johannesburg

The browser's taskbar at the bottom shows various application icons and the system clock indicating 07:59 AM.



# NEW REGISTRATIONS



Deadline for lodgement: Within six months from start (effective) date of the training contract



Late lodgement penalty payable: If the contract is approved by the training office AFTER six months from the start (effective) date of the contract



# NEW REGISTRATIONS: ENTRY REQUIREMENTS

Trainee must be:

- In possession of an accredited degree
- Studying towards an accredited degree
- Undertake to enrol at the next available opportunity



# NEW REGISTRATIONS: CONTRACT TERM

Qualification at the <u>start</u> of the training contract	Basic term of the training contract	Required minimum hours of core experience
<ul style="list-style-type: none"> <li>• CTA or equivalent</li> <li>• Accredited BCom degree</li> <li>• Accredited bridging programme</li> </ul>	36 months	3 600
<ul style="list-style-type: none"> <li>• Non-accredited BCom degree</li> <li>• B Tech degree</li> <li>• Non-relevant degree</li> </ul>	48 months. A remission of 12 months is granted if the trainee achieves the CTA or equivalent or an accredited B Com degree or an accredited bridging programme	4 800
<ul style="list-style-type: none"> <li>• National Diploma in Internal Auditing, Cost and Management Accounting or Taxation</li> <li>• National Higher Diploma in Internal Auditing, Cost and</li> </ul>	48 months. A remission of 12 months is granted if the trainee achieves the CTA or equivalent or an accredited B Com degree or an accredited bridging programme	4800
<ul style="list-style-type: none"> <li>• Matriculation certificate or equivalent</li> <li>• Any other educational qualification not listed above</li> </ul>	60 months. A remission of 12 months is granted if the trainee achieves an accredited BCom degree	6 000



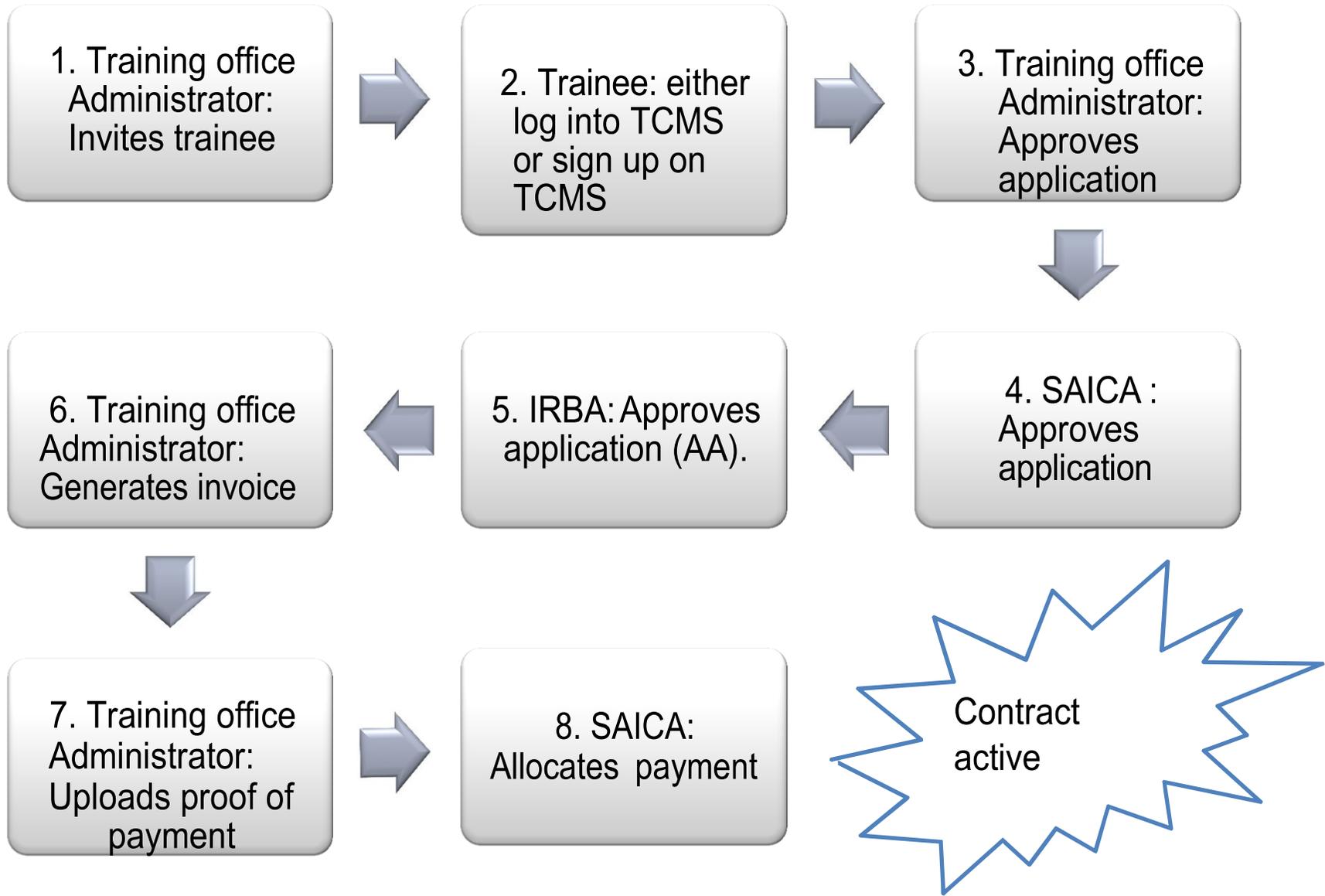
# NEW REGISTRATIONS: CONTRACT TERM

NOTE:

- TCMS WILL AUTOMATICALLY ADD ANY PENALTY ARISING FROM A PREVIOUSLY CANCELLED CONTRACT/S
- A CONTRACT WILL ALWAYS START OVER, EVEN IF THE TRAINEE HAS A PREVIOUSLY CANCELLED CONTRACT



# NEW REGISTRATIONS: PROCESS FLOW



# NEW REGISTRATIONS: STEPS AND ACTIVITIES

TRAINING OFFICE ADMINISTRATOR:  
INVITE TRAINEE TO APPLY FOR A TRAINING CONTRACT

Click on the menu item **“admin and select manage invites”**  
select **“send invites”**

You will need:

- Trainee ID number
- Traineee-mailaddress
- Trainee cell phone number

Complete the fields and click **“add to list”**  
Once done click on **“send invite/s”**

NOTES:

- ENSURE THAT THE TRAINEE ID IS CAPTURED CORRECTLY
- TRAINEE DOES NOT HAVE TO WAIT FOR AN E-MAIL OR SMS TO APPLY



TRAINEE – has never had a previous contract:

STEP 1: Click on “**sign up now**”

STEP 2: Complete fields

SUPPORTING DOCUMENTS:  
ID Book

STEP 3: Save and upload



## APPLY FOR A TRAINING CONTRACT

STEP 1: **Dashboard**– select “ **Documents required**” click on select ID and upload your Identity document (if documents required is 0, SAICA has your ID on record) the Invitation can also be selected to apply for the training contract.

STEP 2: Under **Contract Management**, select “**apply for contract**”

STEP 3: Click on the “**apply**” button

NOTE: IF THE TRAINEE CANNOT SELECT THE TRAINING OFFICE, IT MEANS HE HAS NOT BEEN INVITED OR HIS ID NUMBER WAS CAPTURED INCORRECTLY WHEN HE WAS INVITED

STEP 3: Complete fields

STEP 4: Tick declaration for terms and conditions

STEP 5: Click on “**upload and send request**”

**SUPPORTING DOCUMENTS:**  
Proof of highest qualification achieved  
(must be on university letterhead and  
contain at least the trainee’s name)



# TRAINING OFFICE ADMINISTRATOR: APPROVAL OF THE APPLICATION FOR A TRAINING CONTRACT

On the dashboard select “**applications in progress**”

Click on the “**view**” button and view the contract start date under  
“**view contract**”

Select “**actions**” click on “**process applications**”

## NOTES:

PLEASE ENSURE THAT YOU TAKE EXTRA CARE WHEN VERIFYING

- THE TRAINEE’S ACADEMIC QUALIFICATION
- THE START DATE OF THE CONTRACT



## TRAINING OFFICE ADMINISTRATOR: PAYMENT

1. From the menu items select “Financial Management” and then “manage invoices”
2. Select the training office from the drop down
3. Tick the box under the column “select” and click on “generate invoices”
4. Click on view to “view breakdown”
5. Select the Tab “All Invoices” and select the invoice to be paid,
6. Select the tab “Actions” this tab has two options, “download invoice” and “upload payment”.

### NOTE:

PLEASE NOTE THAT YOU WILL ONLY BE ABLE TO SUBMIT THE PROOF OF PAYMENT ONCE YOU HAVE MARKED THE FULL AMOUNT FOR THE INVOICE AS PAID. THE AMOUNTS CAPTURED AND THE AMOUNT OF THE INVOICE MUST BE EXACTLY THE SAME



SAICA allocates payment



NOTE:  
TRAINEE AND ADMINISTRATOR CAN VIEW REGISTRATION CERTIFICATE



# DISCHARGES



Deadline for lodgement: Within two months  
from the end date of the training contract



Late lodgement penalty payable: If the training Officer approves the discharge AFTER 60 days from the end date of the training contract



# DISCHARGES: REQUIREMENTS

Trainee must:

- Be within 2 months from the end date of the contract
- Trainee must have status “discharge pending”
- Have completed the prescribed minimum hours of core experience;
- Have achieved the competencies

The trainee need not have achieved an accredited degree or CTA in order to be discharged – should the trainee not have achieved an accredited degree the status of the training contract will be completed and not discharged.



# DISCHARGES: STEPS AND ACTIVITIES

Step 1. Trainee logs onto TCMS and selects “contract Management”

“view contract” from the menu item

Step 2. Clicks “view”

Step 3. Selects the Tab “Actions” and selects “Discharge contract” .

Step 4. Enters the core hours, these must not contain decimal places

The hours must be equal to or be more than the hours required for the training contract.

To view the hours select the tab “view contract”

Step 5. Completes the exit survey

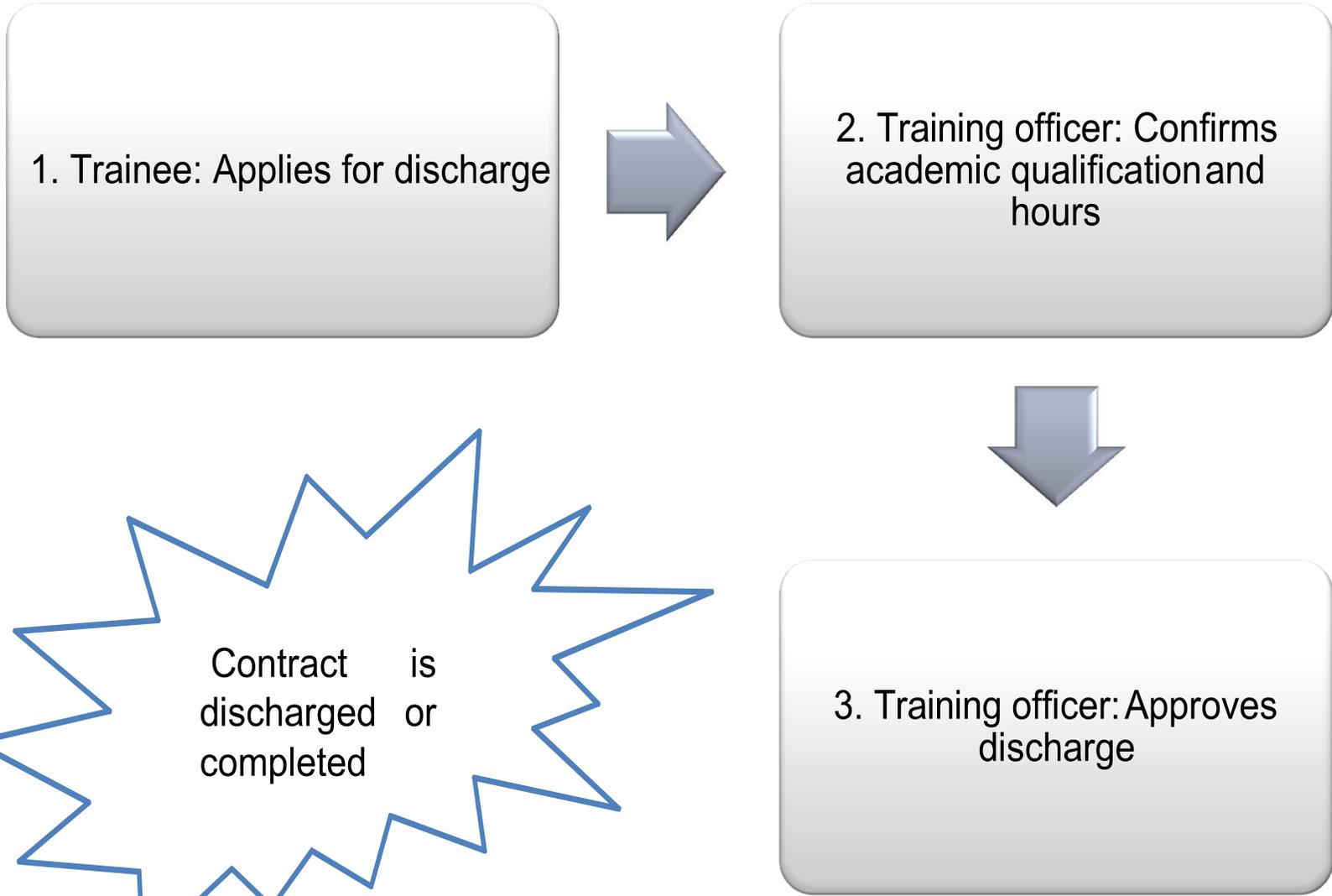
Step 6. “Upload and submit” the application will be sent to the training officer for approval

## **SUPPORTING DOCUMENTS:**

Proof of highest qualification achieved  
(must be on university letterhead and  
contain at least the trainee’s name)



# DISCHARGES: PROCESS FLOWS



## TRAINING OFFICER:

Selects “**discharge requests**” from the Dashboard

Clicks “**view**” on the training contract to be discharged

### NOTES:

PLEASE ENSURE THAT YOU TAKE EXTRA CARE WHEN VERIFYING

- THE TRAINEE’S ACADEMIC QUALIFICATION
- THE HOURS CAPTURED BY THE TRAINEE





Contract is now  
discharged

NOTE:

TRAINEE AND TRAINING OFFICE ADMINISTRATOR CAN VIEW THE DISCHARGE  
CERTIFICATE UNDER THE ACTIONS TAB



# CANCELLATIONS



Deadline for lodgement: Within one month  
from date on which  
the trainee left the training office



Late lodgement penalty payable: If the Cancellation is logged or approved AFTER one month from the date on which the trainee left the training office



# CANCELLATION: TIME PENALTIES

Term of the previous training contract	Automatic penalty
Three years	Six months
Four years	Eight months
Five years	Ten months

NOTE:  
CANCELLATION PENALTY CALCULATED ON THE TERM OF THE  
PREVIOUS CONTRACT



# CANCELLATION: REASONS

Reason	Initiated by trainee	Initiated by administrator	Supporting docs	Incurs penalty	On hold
Contravention of academic progress rule*		X		X	
De-accreditation of training office		X			
Emigration	X		Resignation letter	X	
Failure to provide proof of enrolment		X		X	
Failure to return after approved suspension		X		X	X
Full-time study	X			X	
Incapacity	X	X	Doctor's note		
No longer pursuing CTA	X	X		X	
Other	X	X	Related to reason	X	
Relocation	X	X	Resignation letter		X
Trainee absconded		X		X	X

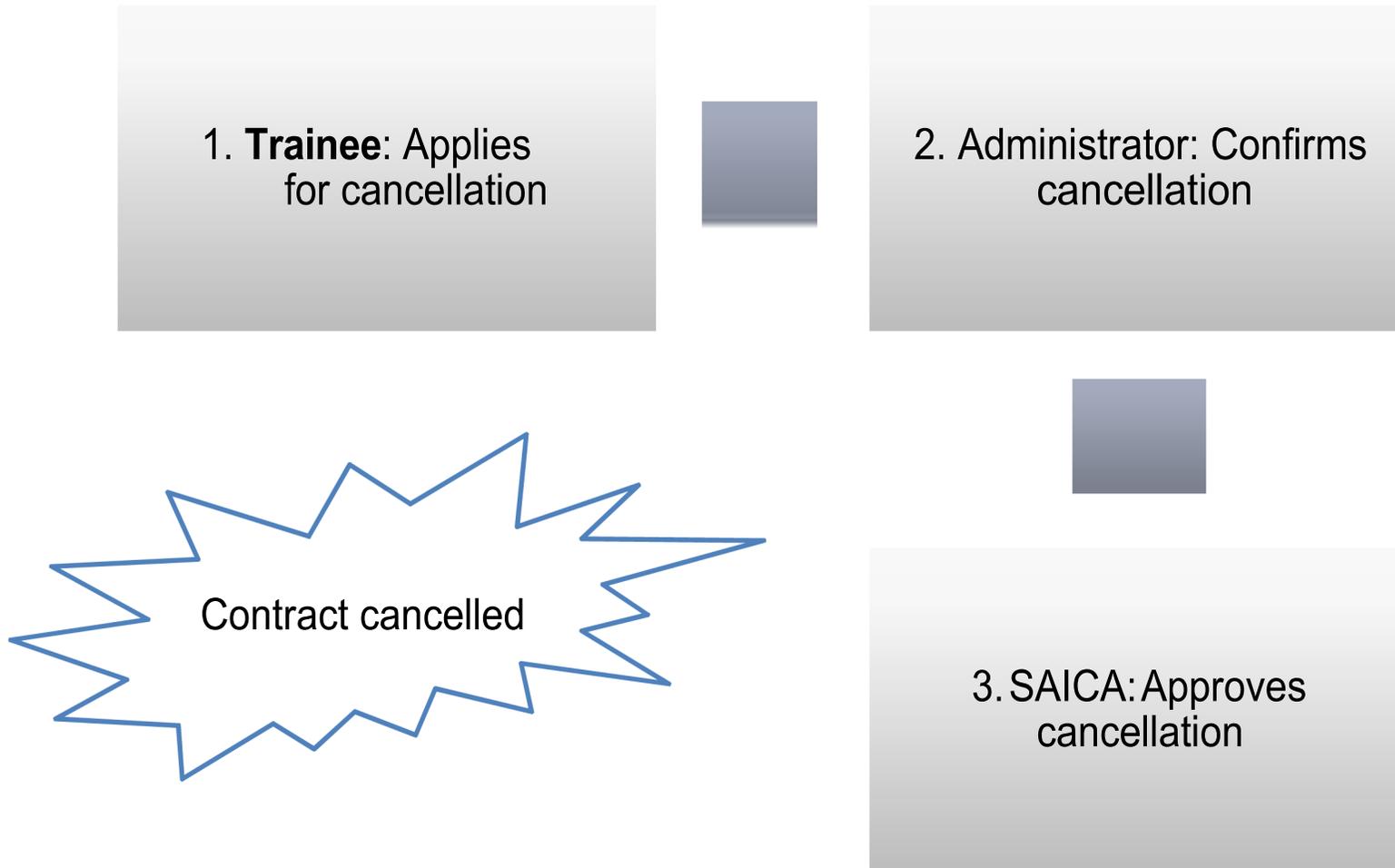


\*Not in last 6 months of contract

Reason	Initiated by trainee	Initiated by administrator	Supporting docs	Incurs penalty	On hold
Trainee continual absence		X		X	X
Trainee deceased		X			
Trainee did not sit for exam		X		X	
Trainee dismissed		X	Transcript of hearing	X	X
Trainee registration at university cancelled		X		X	
Trainee resigned	X	X	Resignation letter	X	
Trainee retrenched		X	Retrenchment agreement		
Training office ceased to exist		X			



# CANCELLATION: STEPS AND ACTIVITIES (scenario 1)



# STEPS AND ACTIVITIES TO CANCEL A TRAINING CONTRACT

- Step 1. **Trainee** logs onto TCMS and selects **“contract Management” “view contract”** from the menu item
- Step 2. Clicks **“view”**
- Step 3. Selects the Tab **“Actions”** and selects **“Cancel contract”**
- Step 4. Enters the work and core hours, these must not contain decimal places.
- Step 5. Completes the exit survey
- Step 6. **“Upload and submit”** the request will be sent to the training office administrator for approval.
- Step 7. The request will be sent to SAICA for approval.



# CANCELLATION: STEPS AND ACTIVITIES (scenario 2)

1. **Administrator:** Applies for unilateral cancellation



2. SAICA: Approves cancellation

Contract cancelled



## STEPS AND ACTIVITIES TO UNILATERALLY CANCEL A TRAINING CONTRACT

Step 1. Training office administrator logs onto TCMS and selects

**“contract Management”** and **“view contract”** from the menu items

Step 2. Selects the training contract that needs to be cancelled by either searching by the SAICA ID, surname or ID number.

Step 3. Clicks on the **“view”** button for the training contract

Step 3. Selects the Tab **“Actions”** and selects **“Unilateral cancel”**

Step 4. Enters the work and core hours, these must not contain decimal places.

Step 5. **“Upload and submit”**

Step 6. The request will be sent to SAICA for approval



**NOTE:**

- **TRAINEE: CAN VIEW CANCELLED CONTRACT**
- **ADMINISTRATOR: CAN VIEW CANCELLED CONTRACT**



# REMISSIONS: ACADEMIC



Deadline for lodgement: None – the trainee can apply for academic remission at any point in the contract



Late lodgement penalty payable: None



# ACADEMIC REMISSION

Previous qualification	Remission
<ul style="list-style-type: none"> <li>• Non-accredited BCom degree</li> <li>• B Tech degree</li> <li>• Non-relevant degree</li> </ul>	<p>A remission of 12 months is granted if the trainee achieves the CTA or equivalent or an accredited BCom degree or an accredited bridging programme</p>
<ul style="list-style-type: none"> <li>• National Diploma in Internal Auditing, Cost and Management Accounting or Taxation</li> <li>• National Higher Diploma in Internal Auditing, Cost and Management Accounting or Taxation</li> </ul>	<p>A remission of 12 months is granted if the trainee achieves the CTA or equivalent or an accredited BCom degree or an accredited bridging programme</p>
<ul style="list-style-type: none"> <li>• Matriculation certificate or equivalent</li> <li>• Any other educational qualification not listed above</li> </ul>	<p>A remission of 12 months is granted if the trainee achieves an accredited BCom degree</p>



## ACADEMIC REMISSION: CALCULATIONS

- If the trainee completes the degree during the first 12 months of the training contract, the training contract expires 36 months from the date on which the trainee completed the degree;
- If the trainee completes the degree during the last 12 months of the training contract, the remission constitutes the remaining balance of the term of the contract;
- If the trainee completes the degree at any other point in the training contract, the term of the training contract is reduced by 12 months.



# ACADEMIC REMISSION: STEPS AND ACTIVITIES

1. Trainee: Applies for academic remission



2. Administrator: Confirms degree and approves academic remission

3. SAICA: Confirms degree and approves academic remission

Contract reduced and end date changed



## ACADEMIC REMISSION : STEPS AND ACTIVITES

- Step 1. Trainee logs onto TCMS and selects **“contract Management”**  
**“view contract”** from the menu item
- Step 2. Clicks **“view”**
- Step 3. Selects the Tab **“Actions”** and selects **“Remission”**
- Step 4. Selects **“academic remission”** from the list
- Step 5. The request will be sent to SAICA for approval.



NOTE:

PLEASE ENSURE THAT YOU TAKE EXTRA CARE WHEN VERIFYING THE  
TRAINEE'S ACADEMIC QUALIFICATION



REMISSIONS: RPL



Deadline for lodgement: Within 14 months from the start (effective) date of the training contract



Late lodgement penalty payable: If the RPL is approved by the training office AFTER 14 months from the start (effective) date of the contract, late lodgement is calculated per month late or part thereof



## RPL: 2 TYPES

Experience NOT under a SAICA contract	Experience under a SAICA contract
Up to 12 months	Up to the maximum of the time served under the previous contract (rounded down)

NOTE:

RPL CANNOT BE USED TO OFF-SET THE CANCELLATION PENALTY



# RPL: STEPS AND ACTIVITIES

1. Trainee: Applies for RPL



2. Administrator: Captured amount of RPL

**Contract reduced  
end date and  
core hour  
changed**



NOTE:

- FOR RPL UNDER A PREVIOUS CONTRACT: THE SYSTEM WILL SHOW THE MAXIMUM AMOUNT OF RPL AVAILABLE
- FOR RPL NOT UNDER A PREVIOUS CONTRACT: THE SYSTEM WILL SHOW 12 MONTHS AVAILABLE



# SUSPENSIONS



Deadline for lodgement: 30 days after the commencement of the suspension



Late lodgement penalty payable: If the suspension is approved by the training office **AFTER** one month from the start (effective) date of the suspension



# SUSPENSIONS: REASON

Reason	Initiated by trainee	Initiated by administrator	Supporting docs
Maternity leave	X		Doctor's note
Other	X	X	Relevant docs
Sick leave	X	X	Doctor's note
Study leave	X		Proof of enrolment



# SUSPENSION: STEPS AND ACTIVITIES (scenario 1)

1. Trainee: Applies for suspension



2. Administrator: Approves suspension



Contract status  
suspended – trainee  
still active

2. SAICA: Approves suspension



# SUSPENSION: STEPS AND ACTIVITIES (scenario 2)

1. Administrator: Applies for suspension



2. SAICA: Approves suspension

Contract status  
suspended – trainee  
still active



NOTE:

- TRAINEE: CAN VIEW CONTRACT – STATUS SUSPENDED
- ADMINISTRATOR: CAN VIEW CONTRACT – STATUS SUSPENDED



# RETURN FROM SUSPENSION

1. Trainee : Applies for return from suspension



2. Administrator : Approves return from suspension

Contract status  
trainee is active



# EXTENSIONS



# EXTENSIONS: REASON

Reason	Approved by the trainee	Initiated by administrator
Trainee has not completed the prescribed minimum core experience and/or work attendance hours by the registered end date of his/her training contract	X	X
Trainee will not have achieved competence in all the prescribed compulsory , elective and residual competencies by the registered end date of his/her training contract	X	X
If at the end of the extension period the trainee has not yet achieved the prescribed competencies, the training officer may extend the trainees contract for a maximum of a further six months – should the trainee become competent prior to the end of this second extension SAICA will alter the contract end date and alter the status of the training contract to discharge pending, the trainee may then apply for discharge OR the training officer may cancel the training contract	X	X
Trainee fails to initiate two successive assessment forms	X	X



Deadline for lodgement: Within one month  
BEFORE the end date of the training contract



Late lodgement penalty payable: If the Extension is logged by the training office AFTER one months before the end date of the contract



# EXTENSIONS: REASONS

Reason	Minimum extension	Maximum extension
Competency not achieved	6 month	12 months
Core experience hours not met	6 month	12 months
Work attendance experience hours not met	6 month	12 months
Other	6 month	12 months
Insufficient academic progress	6 month	12 months



# EXTENSIONS: STEPS AND ACTIVITIES

1. Training office Administrator:  
Applies for extension



2. Trainee: Agrees to extension



Contract extended  
and end date  
changed

2. SAICA: Approves extension



## DOWNLOAD CERTIFICATE OF REGISTRATION DISCHARGE COMPLETED OR CANCELLATION

Select “**contract management**” from the menu and select “**view contract**”

Find the trainee (the search facility has been defaulted to active)

Click on the “**view**” button next to the trainees details

Select the “**actions**” tab and download the certificate



# ADDING A TRAINING CONTRACT ADMINISTRATOR



## Adding a Training Contract Administrator

### TRAINING OFFICERS:

STEP 1: Click on “log in” - You can log into TCMS using the usual username and password that you use to access SAICA’s website

STEP 2: Once you have logged into TCMS, please click on “profile management” three tabs will be available for selection. Change password, personal details and contact details.  
The contact details tab will allow you to update your contact details.

STEP 3: From the menu select “Admin” and select “manage invites”, select the tab “send invites” and select “administrator”

Complete the fields and click “add to list”

Once done click on “send invite/s”

Please note:

- If you are the training officer for more than one training office, you need to repeat this step for each training office for which you are responsible
- You can invite more than one administrator for a training office
- If you do not have an administrator for your training office, please click on the “invite administrators” link and then tick the box to indicate that you are the administrator for your training office.



## Accepting the invitation as a Training Contract Administrator

### TRAINING OFFICE ADMINISTRATORS:

Click on “sign up”. Once you have captured all the information as requested on this screen, you will receive an e-mail, confirming that you have signed up to the TCMS.

Log into TCMS and select the menu item Manage Invites

Click on view and accept

You will then be the administrator for that office



# Removing a Training Office Administrator

The **training officer** selects the manage office tab from the menu items on the left hand side of the screen and clicks on the de-activate button next to the administrator to be removed

The screenshot displays the TCMS Dashboard interface. The left-hand navigation menu is visible, with the 'Manage Offices' tab selected. The main content area shows a 'Dashboard' header with a welcome message. Below this, there is a section titled 'Training Office Related Tasks' which contains a grid of task categories, each with a corresponding count of zero. The tasks listed are: Applications In Progress, Suspend Requests, Return From Suspend Requests, Academic Recess Requests, Remission Requests, Cancel Requests, Discharge Requests, Document Approval Requests, Reverted, Invoices To Generate, Invoices Awaiting Proof Of Payment, Profile Details Changes, and Contact Details Changes, Inter-Firm Transfer Requests. A 'Basic Tasks' section at the bottom shows 'Messages' with a count of zero. The top of the dashboard includes user information for 'Training Officer SAICA God User' and session details.

Training Office Related Tasks					
Applications In Progress	0	Suspend Requests	0	Return From Suspend Requests	0
Academic Recess Requests	0	Remission Requests	0	Cancel Requests	0
Discharge Requests	0	Document Approval Requests	0	Reverted	0
Invoices To Generate	0	Invoices Awaiting Proof Of Payment	0	Profile Details Changes	0
Contact Details Changes	0	Inter-Firm Transfer Requests	0		

Basic Tasks	
Messages	0



TCMS Dashboard

TCMS Login Live | TCMS Login Test | TCMS Login Direct | TCMS Login | TCMS Dashboard | TCMS Dashboard

Other bookmarks

Admin

Profile Management

Contract Management

Financial Management

Help

Let us get you there

User: [Redacted] Roles: Training Officer SAICA God User

Proxy Role: [Redacted]

User Session: 19:39

Leave Proxy Sign Out

Back View Office Details - [Redacted]

Office Details Officers

Officers

SAICA ID	First Name	Last Name	Type	Status	Added On	
[Redacted]	[Redacted]	[Redacted]	TRNOF	A	2016-02-09	
[Redacted]	[Redacted]	[Redacted]	TOAD	A	2012-08-17	Deactivate
[Redacted]	[Redacted]	[Redacted]	TOAD	I	2012-08-15	
[Redacted]	[Redacted]	[Redacted]	TRNOF	I	2008-06-24	
[Redacted]	[Redacted]	[Redacted]	TRNOF	I	2007-01-01	

192.168.64.20/Secure/Offices\_OfficeDetails.aspx?id=00001901#officers

08:08 AM 2016/11/04



# MANAGE INVITES

View invites allows the user to view the status of the invites already sent

The screenshot displays the 'Management Invites' interface in the TCMS system. The left sidebar contains a navigation menu with 'Manage Invites' highlighted. The main area features a 'View Invites' tab and a filter section. The 'Specify which invites to view' section has 'Trainee' selected. The 'Specify a status' dropdown menu is open, showing options: Pending, Select a status..., Pending, Accepted, Declined, Expired, Archived, and Uninvited. Below the filters, there are search criteria fields for 'Training Office', 'Surname', 'SAICA ID', 'Sent Date', and 'Status'. A table header is visible with these columns. The page is on 'Page 1 of 1'. The top right shows the user is 'Training Officer SAICA God User' with a session timer and 'Leave Proxy'/'Sign Out' buttons. The bottom of the screenshot shows a Windows taskbar with the time 07:59 AM on 2016/11/04.



# REPORTING

To access the reporting functionality select the menu item contract management

Then select view reports – there are a number of reports available which download into excel format

The screenshot displays the 'Manage Reports' section of the TCMS Dashboard. The user is logged in as 'Training Officer' (SAICA God User). The page shows a grid of report categories with their respective counts. The user is logged in as 'Training Officer' (SAICA God User).

Report Category	Count	Report Category	Count	Report Category	Count
Application In Progress	0	Active	24	Suspended	0
Discharge Pending	0	Discharged	82	Completed	23
Cancelled	40	Awaiting Invoicing	0	Awaiting Proof Of Payment	0
Awaiting Recon	0	Invitations	180	Reverted	0

