



DIFFERENCE MAKERS



Training Contract
Registration 101

January/February 2026

CAPABILITIES &
ENDORSEMENTS

SAICA
DIFFERENCE MAKERS™

AGENDA

1. Training Contract Registration on TCMS
2. EAT onboarding for trainees
3. Enhancements to EAT
4. Review of the Assessment Process
5. 2026 Training Regulations

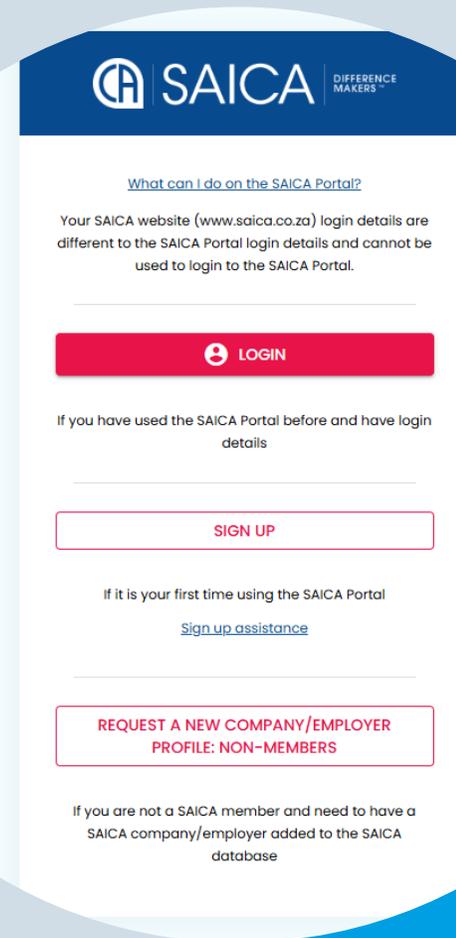


Please use the Q&A function for any questions



DIFFERENCE
MAKERS

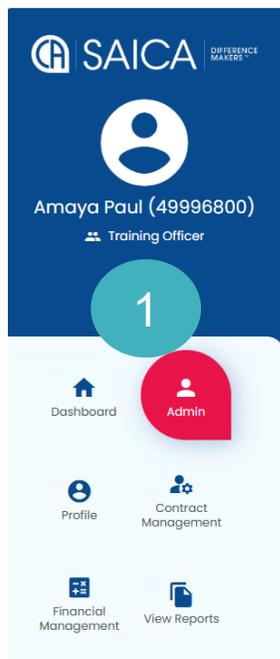
The SAICA Training Contract Management System (TCMS)



DIFFERENCE
MAKERS

TCMS: Invite Trainee

1. Admin
2. View Invites
3. Send Invites



A screenshot of the Admin 'Manage Invites' page. The page title is 'Manage Invites' and it features a 'Send Invites' button (highlighted with a red circle and the number '3'). Below the title are three dropdown menus: 'Select Training Office', 'Select a Role', and 'Select a Status', followed by a search bar. A table below displays a list of invites with columns for Training Office, First Name, Surname, ID Number, SAICA ID, Sent Date, Invite Type, Status, and Action. A single row is visible with the following data: TCMS Test Office 1, Lifter, Makabza, 49999725, 19/08/2025, Trainee, Accepted, and a 'View' button.

TRAINING OFFICE	FIRST NAME	SURNAME	ID NUMBER	SAICA ID	SENT DATE	INVITE TYPE	STATUS	ACTION
TCMS Test Office 1	Lifter	Makabza		49999725	19/08/2025	Trainee	Accepted	View

TCMS: Invite Trainee

- 4. Select type of invite
- 5. Select training office

Send Invites

4

Trainee Administrator EAT Invite

Specify to which training office invites are sent to

5

Please choose... 

NOTE:

Trainee invite = TCMS contract

EAT Invite can be sent at the same time. Do not have to wait for contract to be active on TCMS for trainee to be invited to EAT!

After invite to EAT on TCMS, trainee needs to be activated on EAT – refer to separate section.

Default: will change to accepted, but still needs to be activated on EAT.

STATUS	ACTION
Accepted	View

TCMS: Invite Trainee

6. Enter the SAICA ID of the trainee (or use the bulk upload template)
7. Click on Add to List

The screenshot shows the 'Invite Trainee' interface. At the top, there are five summary boxes: '35 Training Office Quota', '3 Active Trainees', '5 Invites Accepted', '7 Invites Pending', and '0 Transfers Pending'. Below these is a toggle switch for 'With SAICA ID'. The main form has a search field for 'Enter SAICA ID' with a magnifying glass icon, circled with a teal '6'. Below the search field are input fields for 'First Name', 'Surname', 'Govt ID/Passport', 'Mobile Number', and 'Email Address'. At the bottom, there are three buttons: 'Add to List' (circled with a teal '7'), 'Upload Invite Template', and 'Download Invite Template' (circled with a teal '6').

NOTE:

Cannot invite trainee with full details anymore i.e. trainee needs a SAICA ID. Resulted in Duplicate Profiles.

Trainee does not have profile

1. Trainee to register on <https://my.saica.co.za/>
2. Trainee to confirm whether they interacted with SAICA before

1

SAICA DIFFERENCE MAKERS

[What can I do on the SAICA Portal?](#)

Your SAICA website (www.saica.co.za) login details are different to the SAICA Portal login details and cannot be used to login to the SAICA Portal.

LOGIN

If you have used the SAICA Portal before and have login details

SIGN UP

If it is your first time using the SAICA Portal

[Sign up assistance](#)

REQUEST A NEW COMPANY/EMPLOYER PROFILE: NON-MEMBERS

If you are not a SAICA member and need to have a SAICA company/employer added to the SAICA database

2

SAICA Portal

I HAVE A SAICA PROFILE (SAICA ID)

I have an existing record with SAICA. Example - I am / was a CA(SA), AGA(SA), AT(SA), Trainee, Student, Delegate but have not used this SAICA Portal before

I DO NOT HAVE A SAICA PROFILE (SAICA ID)

I do not have an existing record with SAICA – i.e. I have never interacted with SAICA before

GO BACK

SIGN UP

Title *
Please choose...

First Name (Max 20 characters) *

Middle Name (Max 20 characters)

Last Name (Max 30 characters) *

Email *

Mobile Number *

Gender *
Please choose...

Race *
Please choose...

Home language *
Please choose...

Date Of Birth *
yyyy-mm-dd

Select a Document Type

TCMS: Invite Trainee

- 8. Verify trainee details
- 9. Send Invites

To remove a trainee,
click here

8

Show 5

Search: _____

SAICA ID	FIRST NAME	LAST NAME	ID NUMBER	MOBILE NO.	EMAIL ID	ACTION
50000312	Bat	B	Asssss4567	9000008787	batb@yopmail.com	

Showing 1 to 1 of 1 entries

< >

9

Send Invites

TCMS: Trainee to accept invite & apply

1. Trainee to log onto the Member Portal (my.saica.co.za)
2. Click on the TCMS tile (if it does not show, click on the three lines icon in the top left corner)
3. Trainee will then be on the TCMS Dashboard

The screenshot displays the SAICA Member Portal interface. On the left, the user profile for Bat B (50000312) is shown. The main content area is titled 'Dashboard' and features a 'Basic Tasks' section with five tiles: 'Reverted' (0), 'Messages' (0), 'EAT Invites' (0), 'Document Required' (1), and 'Invitation' (1). A red circle with the number '3' highlights the 'Dashboard' tile in the bottom navigation menu.

TCMS: Trainee to accept invite & apply

The screenshot displays the SAICA TCMS dashboard for user Bat B (50000312). The 'Basic Tasks' section contains four notification cards: 'Reverted' (0), 'Messages' (0), 'EAT Invites' (0), 'Document Required' (1), and 'Invitation' (1). The 'Document Required' and 'Invitation' cards are highlighted in pink. Two callout boxes with arrows point to these cards: 'If no certified ID copy has been uploaded yet' points to 'Document Required', and 'Invite from Training Office' points to 'Invitation'. The dashboard includes a sidebar with navigation options: Dashboard, Profile, Contract Management, and Help.

Document Required

Invitation

If no certified ID copy has been uploaded yet

Invite from Training Office

TCMS: Trainee to accept invite & apply

4. Click on Documents Required
5. Trainee will be directed to Document Management, click on upload next to Certified ID Document



Dashboard Profile

Personal Details

Contact Details

Document Management

ID Documents

DOCUMENT TYPE	CREATED ON	CREATED BY	UPLOADED	UPLOADED ON	UPLOADED BY
Certified ID Document	--/--/--	--	No	--/--/--	--

Showing 1 to 1 of 1 entries

Upload 5

TCMS: Trainee to accept invite & apply

6. Select the PDF upload file
7. Click on upload

Upload Document

Certified ID Document

Choose File Example Certi...S test site.pdf

Close Upload

NOTE:

ID document has to be certified.

Name and Surname **MUST** match ID document.

New FASSET requirement – certification



Please refer to the email '*Important Updates: PVAA Examples, TCMS Supporting Documents and Academic Integrity*' sent on 12 December 2025 or refer to this link:

[2025.12.12 - Important Updates - PVAA Examples, TCMS Supporting Documents and Academic Integrity – Training Office Central](#)

2. TCMS Training Contract Applications

For new SAICA training contract requests on TCMS, training offices must ensure that:

- Trainee accountants upload a **certified copy of their ID**.
- The name and surname captured on TCMS match the details on the ID.
- **Certified copies of qualifications**.

FASSET has indicated that this requirement aligns with the attached framework for validating SETA performance information from the Department of Higher Education.

TCMS: Trainee to accept invite & apply

8. Confirm the file was uploaded
9. Navigate to the Dashboard
10. Click on Invitation

The screenshot displays the TCMS user interface. On the left, a sidebar menu includes 'Personal Details', 'Contact Details', and 'Document Management' (highlighted in red). Below the sidebar is a navigation grid with icons for 'Dashboard' (circled with a red '9'), 'Profile', 'Contract Management', and 'Help'. The main content area is titled 'ID Documents' and contains a table with the following data:

DOCUMENT TYPE	CREATED ON	CREATED BY	UPLOADED	UPLOADED ON	UPLOADED BY	
Certified ID Document	27-01-2026	Bat B	Yes	27-01-2026	Bat B	Download

Below the table, it says 'Showing 1 to 1 of 1 entries'. A red box with a white '1' and the text 'Invitation' is circled with a red '10', indicating the next step in the process.

TCMS: Trainee to accept invite & apply



11. Click on Apply

The screenshot shows the TCMS web application interface. The top navigation bar includes a 'Dashboard' button and 'Contract Management' text. A sidebar on the left contains 'View Invites', 'View Contract', and 'Training Office Visit Questionnaire'. The main content area is titled 'View Invites' and features a 'Show 5' dropdown, a search bar, and a table of training invites. The table has columns for 'TRAINING OFFICE', 'TRAINING OFFICER', 'SEND DATE', 'STATUS NAME', and 'ACTION'. A red 'Apply' button is visible next to the first row, and a teal circle with the number '11' is overlaid on the right side of the table.

TRAINING OFFICE	TRAINING OFFICER	SEND DATE	STATUS NAME	ACTION
TCMS Test Office 1	Amaya Paul	27-01-2026	Pending	Apply

TCMS: Trainee to accept invite & apply

12. Trainee to capture Nationality, Citizenship and Disability details

13. Click Next

Contract Application

Nationality **12**

Select Nationality

Disability **12**

None

Citizenship **12**

Select Citizenship

Upload Certified ID Document

Example%20Certified%20ID%20for%20TCMS%20test%20site_2026-01-27T07%3A40%3A08.pdf

Next

13

ID document automatically included from previous upload

TCMS: Trainee to accept invite & apply

- 14. Trainee to upload proof of employment contract
- 15. Capture date on which contract started

NOTE:

- Contract must be signed by both parties
- Start date captured on TCMS = employment contract
- Only full employment contracts including addendums – not offers

Contract Application

Application Basics

Training Office
TCMS Test Office 1

Upload Proof of Employment

14

Proof of employment Test.pdf.

Signed Trainee Full Employment Contract

Date on Which Contract Started

yyyy-mm-dd 15

TCMS: Trainee to accept invite & apply

16. Select postal code of where trainee matriculated

Matriculated Address (Where you Matriculated)

Country	Postal Code
South Africa	1398

16

Matriculated Address (Where you Matriculated)

Country	Postal Code
South Africa	1398

16

- 1394
- 1395
- 1396
- 1397
- 1398

TCMS: Trainee to accept invite & apply

17. Select the correct suburb and municipality from the pop-up

18. Confirm the auto-populated details

17

Please select

POSTAL CODE	PROVINCE	SUBURB	MUNICIPALITY	URBAN/RURAL
<input type="radio"/> 1396	Limpopo	Maseke	Ba-Phalaborwa	Urban

Showing 1 to 1 of 1 entries

Matriculated Address (Where you Matriculated)

18

Country	Postal Code	Province
South Africa	1396	Limpopo
Suburb	Municipality	Urban/Rural
Maseke	Ba-Phalaborwa	Urban

TCMS: Trainee to accept invite & apply

19. Confirm whether trainee has a degree (endorsed or not endorsed)
20. Then capture the required details

19

Achieved Educational Qualification Achievement

Are you Graduated ?

Yes No

TCMS: Trainee to accept invite & apply



No Degree – Matric:

Are you Graduated ?

Yes No 20

Please enter your Matriculation details

Date Achieved	Institution	Name of Qualification
2025-12-31	My High School	Matric

Upload Proof of Qualification

No file chosen

Degree:

Are you Graduated ?

Yes No

Do you have a SAICA Accredited Degree ?

Yes No 20

Please enter your Qualification details

Date Achieved	Institution	Name of Qualification
2025-12-31	University of Johannesburg	BCom LLB

Upload Proof of Qualification

No file chosen

TCMS: Trainee to accept invite & apply

Accredited Degree – capture the required information using the provided drop-downs:

Achieved Educational Qualification Achievement

Are you Graduated ?
 Yes No

Do you have a SAICA Accredited Degree ?
 Yes No

Please enter your Qualification details

Date Achieved
2025-12-31

Select Institution

- IIE Varsity College - Durban North
- IIE Varsity College Durban-Westville
- IIE Varsity College Pretoria
- IIE Varsity College Sandton
- Institute of Accounting Science
- Institute of Accounting Sciences
- Milpark Education (Pty) Ltd
- Milpark Education (Pty) Ltd
- NELSON MANDELA METROPOLITAN UNIVERSITY
- New York University
- North-West University
- REGENT BUSINESS SCHOOL

20

Select Qualification

- Postgraduate Diploma Accounting Sciences
- Postgraduate Diploma Accounting Sciences
- Bachelor of Accountancy [Bcom Accountancy]
- Bachelor of Accounting [B Acc]
- Bachelor of Accounting Honours (CA)**
- Bachelor of Commerce in Accounting [BCom Accounting (Extended programme)]
- Bachelor of Commerce in Accounting [BCom Accounting]
- Bachelor of Commerce (Accounting) [B Com Accounting]
- Bachelor of Commerce in Accounting [BCom Accounting (Extended programme)]
- Bachelor of Commerce in Accounting [BCom Accounting]
- Bridging Certificate in the Theory of Accounting [BCTA]
- Postgraduate Diploma Accounting Sciences

Term of a Training Contract

Refer to Regulation 16 in the [SAICA Training Regulations](#)

Qualification	Term of contract
Endorsed post-graduate qualification	36 months
Endorsed degree	
Bridging programme	
Non-endorsed degree	48 months
Relevant Advanced Certificates and Diplomas at NQF level 6	
Matriculation certificate, National Senior Certificate or equivalent	60 months
Any other educational qualification not listed above	

For list of endorsed qualifications – refer to the SAICA website:
[SAICA Endorsed Academic and Professional Programmes](#)

New contracts, where trainee had a previous contract – full term until application for RPL

FASSET: Certification Requirement

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[2025.12.12 - Important Updates - PVAA Examples, TCMS Supporting Documents and Academic Integrity – Training Office Central](#)

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- **Certified copies of qualifications**.

FASSET has indicated that this requirement aligns with the attached framework for validating SETA performance information from the Department of Higher Education.

TCMS: Trainee to accept invite & apply

- 21. Upload proof of qualification
- 22. Click on Terms and Conditions

21

Upload Proof of Qualification

No file chosen

22

Terms and Conditions



TCMS: Trainee to accept invite & apply

23. Accept the Terms and Conditions

SAICA

Bot B (50000312)
Individual

Dashboard Profile

Contract Management Help

Logout

Training Contract Terms & Conditions

1. Definitions

1. In this document, unless the context otherwise indicates:

- "Employment Contract"** means a contract or letter of appointment signed by the Training Office and acknowledged by the trainee accountant, which deals with the conditions of employment of the trainee accountant, as provided for in the Basic Conditions of Employment Act, the Labour Relations Act and any other applicable legislation;
- "GDPR"** means the General Data Protection Regulation of the European Union (EU) 2016/679;
- "Personal Information"** means information which relates to and identified or identifiable natural person, and where applicable, an identifiable, existing juristic person, in particular by reference to an identifier factor such as a name, identification number, location data, online identifiers or other specific factors such as physical, physiological, genetic, mental, economic, cultural or social identity of a natural person, as defined in Section 1 of the POPIA and Article 4 of the GDPR, whichever is applicable under the circumstances;
- "POPIA"** means the Protection of Personal Information Act, 4 of 2013 and its Regulations, which effective date still have to be determined;
- "Processing"** means any operation or set of operations performed on personal information or sets of personal information, as defined in Article 4 of the GDPR and Section 1 of the POPIA, whichever is applicable under the circumstances;
- "Special Personal Data Information"** means Personal Information described in Section 26 of the POPIA and Article 9 (1) of the GDPR, whichever is applicable under the circumstances;
- "Regulations"** means SAICA's Training Regulations, as amended from time to time;
- "SAICA"** refers to the South African Institute of Chartered Accountants, a body corporate not for gain, established in terms of its own Constitution and incorporated in accordance with the laws of the Republic of South Africa;
- "Training Contract"** includes a reference to a learnership agreement;
- "Trainee Accountant"** includes a reference to a learner;
- "Training Officer"** is a member of the South African Institute of Chartered Accountants and, if applicable, registered with the Independent Regulatory Board for Auditors (IRBA). Such person must be based at the training office, and is responsible for the training of trainee accountants carried out at or from the training office and who, in the case of a partnership, by virtue of a resolution of the partners, is empowered to act on behalf of the training office pertaining to the training of trainee accountants employed at that training office; and
- "Training Office"** means an accredited training office whether within or outside the borders of South Africa, and refers to an organisation in commerce and industry or public practice or the public sector that is approved by and registered with SAICA as an organisation where prospective CAs may be trained.

2. This Training Contract is entered into between the parties in order to enable SAICA to regulate the effectiveness of the practical training undergone by the trainee accountants, in terms of SAICA's Regulations prescribed from time to time.

2. The Parties to the Training Contract Agree that:

- this training contract is entered into in terms of, and is subject to, such provisions of Regulatory Requirements as are applicable and the Regulations pertaining to trainee accountants prescribed by SAICA from time to time;
- any amendments or additions to the Regulations that affect this training contract will be deemed to be incorporated in this training contract upon promulgation, notwithstanding that notice of such amendments or additions may not have been given to the parties;
- SAICA may act, in relation to the training contract, in accordance with the powers conferred on it by the Regulation;
- a written contract of employment has been entered into between the training office and the trainee accountant for a period not less than the duration of this training contract, as prescribed by the Regulations;
- if conflict should arise between the terms and conditions of this training contract and the terms and conditions of the contract of employment, the training contract will prevail, subject to the applicable labour laws applicable thereto;
- the transfer to another training office of another training office, or the suspension or cancellation of this training contract, may only occur if the parties mutually agree thereto or when the transfer, suspension or cancellation has been ordered by SAICA. The transfer, suspension or cancellation is only effective once it has been approved and registered by SAICA;
- any dispute between the parties arising from this contract must be referred to SAICA for settlement and the decision of SAICA will be final and binding on the parties;
- should SAICA not approve the registration of, or cancellation of the registration of this training contract, the contract will be null and void;
- the commencement date of this training contract will be the date approved and registered by SAICA as such;
- the commencement date of this training contract will not be backdated by more than 6 (six) months; and
- interruptions of the duration of this training contract, as defined in SAICA's training regulations, as a result of temporary absence from employment will be limited to the maximum periods prescribed in the Regulations.

3. The Training Officer Agrees that:

4. The trainee agrees that

- the trainee accountant will be afforded every reasonable opportunity to obtain sufficient exposure to the range of core experience, as defined by SAICA from time to time, to enable him/her effectively to apply knowledge in a variety of relevant situations;
- the trainee accountant will be properly instructed in the standards of professionalism and ethics expected of chartered accountants and, where applicable, registered auditors;
- the training officer will comply with his/her duties in terms of all applicable legislation, including:
 - the Basic Conditions of Employment Act (Act 75 of 1997);
 - any applicable determination made in terms of section 18(3) of the Skills Development Act (Act 97 of 1998).

5. The Trainee Accountant Agrees that:

- he/she will diligently serve the training office in the profession of a chartered accountant and, if applicable, registered auditor;
- he/she will diligently pursue his/her studies in the theory and practice of the profession of a chartered accountant and, if applicable, registered auditor and that he/she will notify the training officer immediately he/she ceases to be registered for a course that would lead to the eventual award of a SAICA accredited qualification;
- he/she will during the currency of this training contract not engage in any other business or occupation without the express written authority of the training officer;
- he/she will at all times keep the affairs of the training office and its clients confidential and will not breach any codes of professional conduct, disciplinary rules or by-laws that apply to the profession of a chartered accountant and, if applicable, registered auditor;
- he/she will comply with any training office policies and procedures;
- he/she will complete any timesheets and/or other assessment tools supplied by the training officer to record training experience;
- he/she agrees that the training officer will be entitled, and is hereby authorised, to disclose to SAICA any circumstances which in the opinion of the training officer may constitute improper conduct on the part of the trainee accountant. The trainee further agrees that the training officer may make available to SAICA all information regarding disciplinary procedures in the training office in which the trainee may have been involved, including the record of those procedures; and
- prior to leaving the training office the trainee undertakes to complete the exit survey and within 30 (thirty) days after completion of the duration of the training contract, he/she will submit a duly completed Final assessment - Training record form to the training officer for onward submission to SAICA.

6. Personal Information Protection and Security:

- SAICA recognises and is committed to manage and protect the fundamental rights and freedoms of the trainee accountant, training officer and training office, and more specifically the right to privacy which includes the right to the protection against the unlawful processing of personal information.
- SAICA is committed to manage and process your personal information in accordance to the provisions of POPIA and GDPR, which specifically provides for the lawful, fair and transparent processing of your personal information for specified, explicit and legitimate purposes.
- SAICA is required to provide you with a Data Protection Notice which outlines SAICA's processes in terms of the collection, use and disclosure of your personal information, to ensure fair and transparent processing. SAICA's Data Protection Notice, General Data Protection & Retention Policy and Privacy Policy can be found on the SAICA website: www.saica.co.za.
- The Trainee Accountant, Training Officer and Training Office acknowledges and hereby consent to SAICA and/or its representative/s processing his/her/its personal information as defined in the POPIA and GDPR, where applicable, for the purpose/s of carrying out obligations arising from the Training Contract; for circumstances which are compatible with the purposes for which the personal information was collected and in pursuing the legitimate interests of the trainee accountant or SAICA in terms of any By-laws, applicable regulations, policies and codes. He/she/it further consents to SAICA and/or its representatives disseminating said personal information where SAICA deems appropriate and in compliance with the POPIA and GDPR, where applicable.

Close Download T&C Accept

22

Close

Download T&C

Accept

TCMS: Trainee to accept invite & apply

24. Complete the declaration

25. Submit application

Declaration

24

I apply for the registration of training contract and declare that:

- I have not been found guilty of and have no pending or current investigations, charge/s or proceedings against me for a criminal offence/s that renders me ineligible for registration;
- I have not been declared insolvent and there are no current or pending insolvency applications against me in circumstances which may render me ineligible for registration;
- I will endeavour to make sufficient academic progress by achieving at least one year of academic progress during any two calendar years, I understand that academic progress is the progression in studies towards the completion of a SAICA accredited qualification
- I have read the terms and conditions and SAICA training regulations pertaining to the training contract and understand that these are applicable to me;
- I have read the SAICA By-laws and Code of Professional Conduct and understand that these are applicable to me;
- I have entered into a separate employment contract with the training office; and
- The information provided in this application is to the best of my knowledge true and correct.

SUBMIT REQUEST

25

TCMS: Trainee to accept invite & apply



Invite status will change to Accepted

The screenshot shows a web application interface for 'Contract Management'. The top navigation bar includes a 'Dashboard' button (highlighted in red) and a 'Contract Management' tab. On the left, a sidebar menu contains 'View Invites' (highlighted in red), 'View Contract', and 'Training Office Visit Questionnaire'. The main content area is titled 'View Invites' and includes a 'Show 5' dropdown menu and a search field. Below this is a table with the following data:

TRAINING OFFICE	TRAINING OFFICER	SEND DATE	STATUS NAME	ACTION
TCMS Test Office 1	Amaya Paul	27-01-2026	Accepted	

Below the table, it says 'Showing 1 to 1 of 1 entries'. A teal arrow points to the 'Accepted' status in the table. The bottom right of the interface has navigation arrows (< >).

TCMS: Trainee to accept invite & apply



Contract Status will change to Application in Progress and Workflow Status to Awaiting Training Office Approval.

The screenshot shows the 'Contract Management' section of the TCMS interface. On the left, there is a sidebar with three menu items: 'View Invites', 'View Contract' (highlighted in red), and 'Training Office Visit Questionnaire'. The main content area is titled 'View Contract' and features a table with the following columns: TRAINING OFFICE, START DATE, END DATE, FIRST NAME, LAST NAME, ID NUMBER, SAICA ID, WORKFLOW STATUS, CONTRACT STATUS, and ACTION. A single entry is displayed in the table, with two blue arrows pointing to the 'Awaiting Training Office Approval' and 'Application In Progress' cells. Below the table, it says 'Showing 1 to 1 of 1 entries'. The top navigation bar includes a 'Dashboard' button and a 'Contract Management' breadcrumb. On the right, there are user profile and search icons.

TRAINING OFFICE	START DATE	END DATE	FIRST NAME	LAST NAME	ID NUMBER	SAICA ID	WORKFLOW STATUS	CONTRACT STATUS	ACTION
TCMS Test Office 1 (49997116)	01/01/2026	31/12/2028	Bat	B	Asssss4567	50000312	Awaiting Training Office Approval	Application In Progress	View

TCMS: Training Office Review

On the Dashboard, click on Application in Progress

The screenshot displays the SAICA TCMS dashboard for a Training Officer. The user is Amaya Paul (49996800). The dashboard features a sidebar with navigation options: Dashboard (highlighted), Admin, Profile, and Contract Management. The main content area is titled 'Training Office Related Tasks' and contains a grid of task cards. A red arrow points to the 'Applications In Progress' card, which shows a count of 1. Other tasks include Reverted (1), Academic Recess Requests (0), Discharge Requests (1), Invoices To Generate (2), Suspend Requests (0), Remission Requests (0), Document Approval Requests (1), Inter-Firm Transfer Requests (0), Invoices Awaiting Proof Of Payment (3), Return From Suspend Requests (0), and Cancel Requests (0). EAT Invites also shows a count of 0.

Task Category	Count
Reverted	1
Applications In Progress	1
Academic Recess Requests	0
Discharge Requests	1
Invoices To Generate	2
Suspend Requests	0
Remission Requests	0
Document Approval Requests	1
Inter-Firm Transfer Requests	0
Invoices Awaiting Proof Of Payment	3
Return From Suspend Requests	0
Cancel Requests	0
EAT Invites	0

TCMS: Training Office Review

1. Click on View

The screenshot displays the SAICA TCMS Admin interface. On the left, a user profile for Amaya Paul (49996800), Training Officer, is shown. The main content area is titled 'Admin' and contains a sidebar menu with options: 'Manage Invites', 'Manage Request' (highlighted in red), 'Manage Office', 'Manage Communication', and 'Visit Evaluation'. The 'Manage Request' section is active, showing a dropdown menu set to 'Application In Process'. Below this, there is a table with columns: FIRST NAME, LAST NAME, ID NUMBER, SAICA ID, STATUS, and ACTION. A single entry is listed: Bat, B, Asssss4567, 50000312, Application In Progress. A red 'View' button is next to this entry, and a red circle with the number '1' is overlaid on it. The bottom of the interface shows navigation icons for Dashboard and Admin.

FIRST NAME	LAST NAME	ID NUMBER	SAICA ID	STATUS	ACTION
Bat	B	Asssss4567	50000312	Application In Progress	View

TCMS: Training Office Review

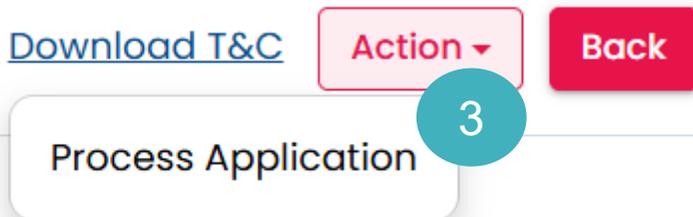
2. Review the details of the contract and take note of the following:
 - Correct training office
 - Start date of contract – this should align to contract supporting document when you process the application
 - Qualification details – this should align to supporting document when you process the application

The screenshot displays the 'Training Contract Details : Bat B (50000312)' page. The page is divided into sections: 'Contract Details', 'Personal Details', and 'Training Office Details'. The 'Personal Details' section includes fields for Title (Mr), First Name (Bat), Middle Name (-), Last Name (B), ID Number (Asssss4567), and SAICA ID (50000312). The 'Training Office Details' section includes fields for Training Office (TCMS Test Office 1), Training Office ID (49997116), Training Officer (Amaya Paul), and Training Officer ID (49996800). A red circle with the number 2 highlights the Training Office ID field.

Training Contract Details : Bat B (50000312)	
Download T&C Action Back	
Personal Details	
Title	First Name
Mr	Bat
Middle Name	Last Name
-	B
ID Number	SAICA ID
Asssss4567	50000312
Training Office Details	
Training Office	Training Office ID
TCMS Test Office 1	49997116
Training Officer	Training Officer ID
Amaya Paul	49996800

TCMS: Training Office Review

3. Click on Action > Process Application
4. Select the SETA
5. Select the Elective



Trainee Contract Details (Bat B : 50000312) Back

4

SETA

Select ▾

5

Elective

<input type="checkbox"/> Auditing And Assurance Foreign Offices	<input type="checkbox"/> CA2025 Auditing And Assurance	<input type="checkbox"/> Management Decision Making
<input type="checkbox"/> Auditing And Assurance	<input type="checkbox"/> Taxation	
<input type="checkbox"/> Not Applicable	<input type="checkbox"/> Internal Auditing	
<input type="checkbox"/> Financial Management	<input type="checkbox"/> CA2025	

TCMS: Training Office Review

6. Click on View Document for EACH supporting document

Please click on "View Document" to review and validate the documents uploaded by applicant in order to submit the application

Documents

Trainee ID Document

[View Document](#)

6

Trainee Achieved Qualification

[View Document](#)

6

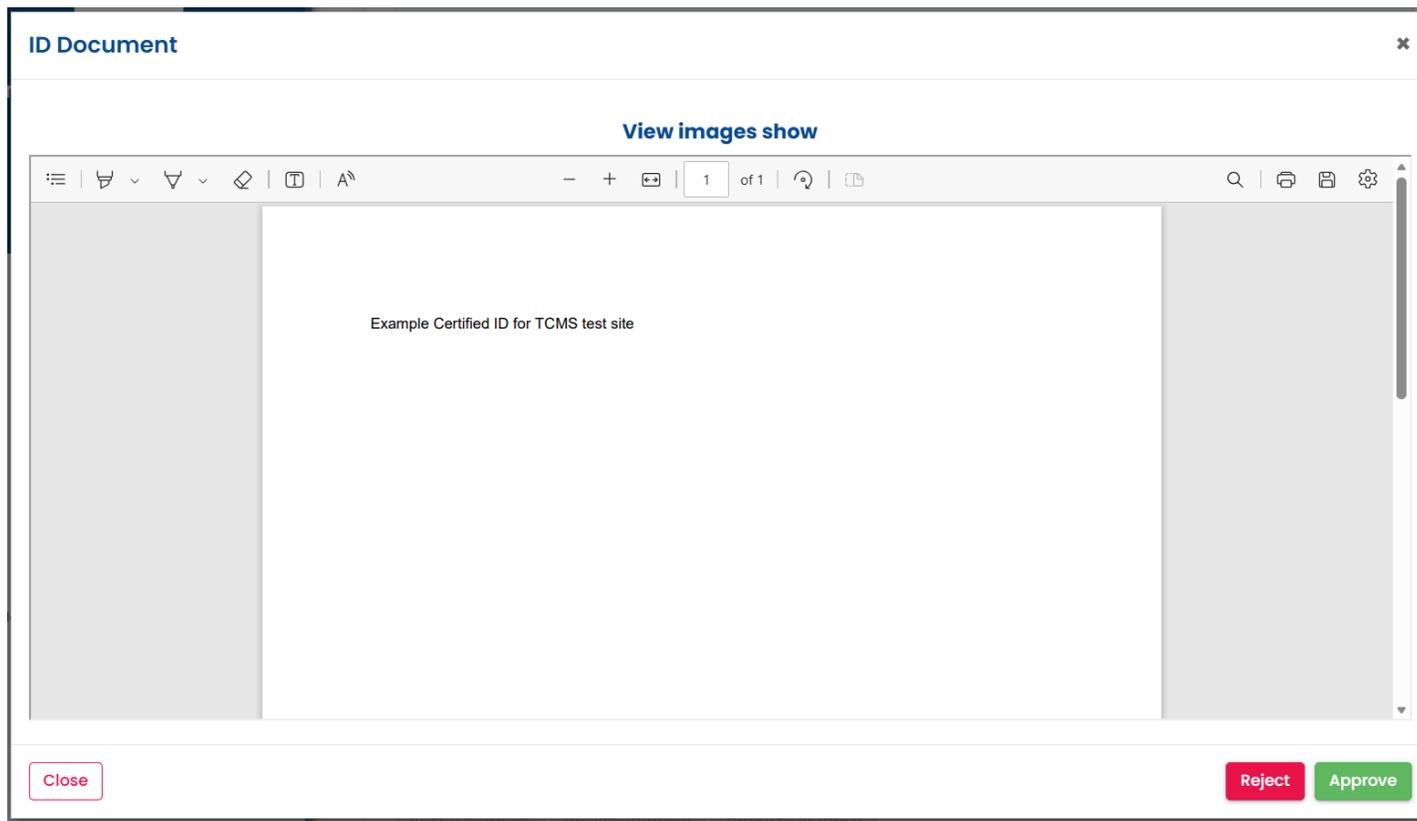
Trainee Full Employment Contract

[View Document](#)

6

TCMS: Training Office Review

7. Click on Approve / Reject to review the document



If you reject, the only options will be to Revert the contract or Decline.

TCMS: Training Office Review

8. Once confirmation is completed, you can Revert / Decline / Approve the contract

Confirmation

I hereby confirm the following for the contract of Bat B (50000312)

- ID Number Confirmed
- Trainee Full Employment Contract Confirmed
- Start Date Confirmed
- Achived Qualification Confirmed

8

Revert Request Decline Request Approve Request

If you rejected any of the supporting documents, the only options will be to Revert the contract or Decline.

TCMS: Training Office Review

9. When reverting the contract – select all options to ensure the trainee can edit the contract

9

Reason For Revert

Please Specify a Reason For Reverting For Each Filed

- Trainee Full Employment Contract
- Contract Start Date
- Achieved Qualification
- Enrolled Qualification
- ID Document

Close Continue

Once reverted, the contract will be back on the Trainee's dashboard

Prevent contract from being reverted

- Start date captured on TCMS = employment contract
- Only full employment contracts including addendums – not offers
- Qualification captured on TCMS = uploaded proof of qualification / enrolled qualification
- Achieved SAICA endorsed qualification → certificate / transcript to state **Obtained / Achieved / Fulfilled / Completed / Pass / Qualifies**
Cannot accept a transcript with only passed subjects
- Documents may not be password protected!
- First name & surname captured on TCMS = ID uploaded (add marriage certificate if needed)
- Check latest list of SAICA endorsed programmes

Process for contract to become active



Registration activity	Contract Status	Workflow Status
Trainee invited	-	-
Trainee submitted application	Application in progress	Awaiting Training Office Approval
TO revert application	Application in progress	Action Required
TO declines application	Declined	Declined
TO approves application	Application in progress	Awaiting SAICA Approval
SAICA reverts application	Application in progress	Action Required
SAICA declined application	Declined	Declined
SAICA approves application	Application in progress	Awaiting IRBA Approval
IRBA reverts application	Application in progress	Action Required
IRBA declines application	Declined	Declined
IRBA approves application	Application in progress	Awaiting Invoicing
TO generates SAICA invoice	Application in progress	Awaiting Proof of Payment
TO uploads proof of payment	Application in progress	Awaiting Recon
SAICA allocated payment	Active	Active

Contract on Hold

- Contracts are automatically placed on hold by TCMS depending on the reason for the cancellation of the previous training contract
- Mainly three cancellation reasons for the hold:
 - Trainee was dismissed – pending SAICA review of reason for dismissal
 - Trainee relocation – to assess whether trainee can apply for exemption from the 6-month penalty
 - Cancellation was cancelled with reason as “other”

Trainee can continue to document evidence on EAT (ensure EAT-Invite is sent)

Contract will only proceed to next status once hold is lifted

FASSET: Certification Requirement

Please refer to the email '*Important Updates: PVAA Examples, TCMS Supporting Documents and Academic Integrity*' sent on 12 December 2025 or refer to this link:

[2025.12.12 - Important Updates - PVAA Examples, TCMS Supporting Documents and Academic Integrity – Training Office Central](#)

2. TCMS Training Contract Applications

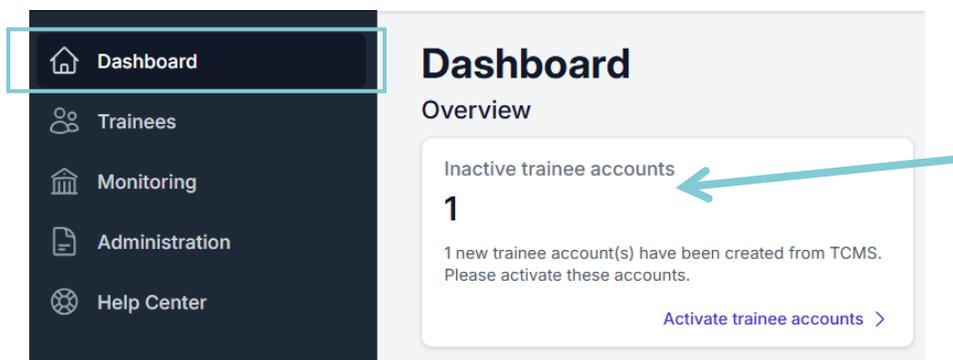
For new SAICA training contract requests on TCMS, training offices must ensure that:

- Trainee accountants upload a **certified copy of their ID**.
- The name and surname captured on TCMS match the details on the ID.
- **Certified copies of qualifications**.

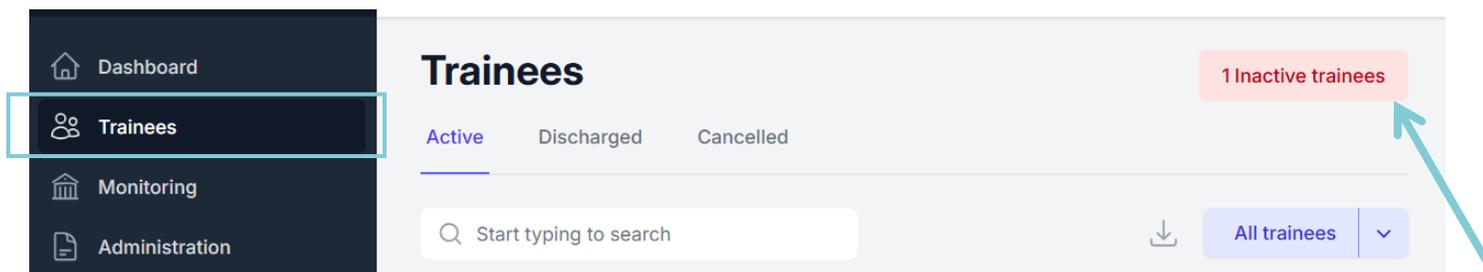
FASSET has indicated that this requirement aligns with the attached framework for validating SETA performance information from the Department of Higher Education.

EAT Onboarding

Once the EAT-invite on TCMS is sent, trainee needs to be activated on EAT:



The screenshot shows the EAT Dashboard. The left sidebar has 'Dashboard' highlighted. The main content area is titled 'Dashboard Overview' and features a card for 'Inactive trainee accounts' with a count of '1'. A teal arrow points to the 'Inactive trainee accounts' text. Below the count, it states '1 new trainee account(s) have been created from TCMS. Please activate these accounts.' and includes a link 'Activate trainee accounts >'.



The screenshot shows the EAT Trainees page. The left sidebar has 'Trainees' highlighted. The main content area is titled 'Trainees' and has tabs for 'Active', 'Discharged', and 'Cancelled'. A red badge in the top right corner indicates '1 Inactive trainees', with a teal arrow pointing to it. Below the tabs is a search bar with the placeholder 'Start typing to search', a download icon, and a dropdown menu labeled 'All trainees'.

EAT Onboarding

Click on Activate Trainee Account

Trainees > Inactive trainees

Inactive trainees

Start typing to search

NAME 	SAICA ID	INVITED FROM TCMS	
Test Trainee	49998568	3 months ago	

Activate trainee account

EAT Onboarding

Select Assessment start date, training plan and current PDS period.

NOTE:

- Assessment start date CAN BE DIFFERENT to contract start date
- Assessment start date = date from which trainee should be assessed on EAT
- Assessment start date cannot be changed after trainee creates first PDS

Once you click SAVE, trainee will receive an email to create EAT account and accept invite

Trainees > Inactive trainees > Activate trainee

Test Trainee

Please consider the following when activating a trainee:

- The 'Assessment start date' should be the date from when the trainee should be assessed on the EAT at your Training Office.
- The 'Assessment start date' can be different than the trainee's training contract start date, for example when the trainee is on probation.
- The 'Assessment start date' cannot be changed after the trainee created their first PDS.
- The 'Current PDS period' will start from the 'Assessment start date'.
- The 'Current PDS period' refers to the PDS periods on the training plan.
- The PDS period length is specified on the training plan.
- A trainee can submit a PDS for a shorter period than specified in the training plan, however a trainee cannot submit a PDS for a longer period than specified in the training plan.

Assessment start date

Training plan

Current PDS period

Recognition of prior learning

Enhancements to EAT – January 2026

Please refer to the email '**SAICA EAT: Several enhancements implemented**' sent on 26 January 2026 or refer to this link:

[2026.01.26 - SAICA EAT - Several enhancements implemented – Training Office Central](#)

Deleting
assessment
instruments

Hiding the removed
PVAA learning
outcomes

Discharge Process
enhancement

Reports and exports

Enhancements
related to levels of
proficiency

Various user
interface
improvements

Review of the assessment process

A survey will be sent out in February 2026 to all role-players in the assessment process:

- Trainees
- Reviewers
- Evaluators
- Assessors
- Training Officers and Training Office Administrators

Please ask your trainees and managers to complete the survey

The survey should only take a few minutes to complete

Will provide valuable insights into the assessment process

We will also schedule focus group engagements with the training officers and training office administrators for additional feedback on proposed changes (during February – March 2026).

2026 SAICA Training Regulations



Please refer to the email '**SAICA Training Office Communication - 2026 SAICA Training Regulations and Annual Updates**' sent on 07 January 2026 or refer to this link: [SAICA Training Regulations – Training Office Central](#)

SAICA Training Regulations

7 days ago · Updated

 Download Document

 Explanatory memorandum - Training Regulations 2026.pdf
200 KB · Download

 Training Regulations 2026 - Markup version.pdf
600 KB · Download

 Training Regulations 2026 - Clean version.pdf
600 KB · Download

Note:
The SAICA.org.za website is still being updated by the website team

Changes to the 2026 SAICA Training Regulations

Key changes highlighted

#DIFFERENCE
#MAKERS

- Regulation 10: Amended to clarify reimbursements permitted from cancelled trainees
- Regulation 24: Trainee required to submit discharge application within 30 days of contract end date
- Annexure 2: Accreditation Criteria
 - C7, C8 and C9: Amendments to align to the CA of the Future competency framework and remove duplication
 - D2.1.1: LOR submission requirement

D2.1

Learning Outcome Review

1. Trainee accountants must submit at least one (1) LOR every two months. Training offices may require more regular submission.

Change currently
being developed
on the EAT

Changes to the 2026 SAICA Training Regulations

Key changes highlighted

#DIFFERENCE
#MAKERS

- Annexure 2: Accreditation Criteria (continued)
 - D2.1.2: Replaced six journalist questions with “narrative description”
 - D2.2.3: Responsibilities of Assessors have been revised
 - No longer separate paragraph of responsibilities for the evaluator
 - Certain functions **may still be delegated** to the evaluator
 - Evaluator role **NOT eliminated** – evaluator involvement determined by training office’s internal processes
 - Change highlights that, even when delegated to Evaluator, responsibility ultimately rests with Assessor
 - D2.2.4: Timelines to meet, discuss and finalise PDS updated to six weeks.

New Guideline: Responsible use of AI in completing SAICA assessment forms



GUIDELINE: RESPONSIBLE USE OF AI IN COMPLETING SAICA ASSESSMENT FORMS

Objective

To ensure that trainee accountants use Artificial Intelligence (AI) tools responsibly and ethically when completing SAICA assessment forms by maintaining authenticity, originality, confidentiality, and accountability, while leveraging AI only as a support tool to enhance clarity and structure without replacing personal reflection or judgment.

1. Authenticity of evidence

- All evidence must be based on real experiences, for example audit engagements, training office tasks, or other professional activities.
- Evidence may not be fabricated or exaggerated. It must represent authentic, verifiable reflections of the prescribed competencies.

2. Use of own words

- Even when AI tools are used for grammar or clarity, the content must remain in the trainee accountant's own words, reflecting personal experiences and understanding.
- The direct use of generic or unedited AI-generated text is not permitted.

3. AI as a support tool, not a substitute

- AI tools may be used to:
 - Assist in structuring responses (e.g., ensuring appropriate detail to narrative description of how PVAA was demonstrated).
 - Improve clarity and professional tone.
 - Brainstorm ways to present evidence logically.
- AI tools may not be used as a replacement for the trainee accountant's own reflection, judgment, or articulation of experiences.

4. Accountability

- Trainee accountants remain fully responsible for the accuracy, integrity, and authenticity of all submissions.
- Trainee accountants must be able to substantiate, discuss, and defend the evidence provided if questioned by reviewers or assessors.

5. Confidentiality

- Confidential client or firm information may not be disclosed, uploaded, or otherwise shared with AI tools.
- Summarised or anonymised references must be used where necessary.

Who initiates & approves requests on TCMS



Request	Initiated by	TO Approval	SAICA Approval	IRBA approval	Other
Contract Registration	Trainee	Yes	Yes	Yes	
Academic Recess	Trainee	Yes	Yes		
Remission – Academic	Trainee	Yes	Yes		
Remission – RPL	Trainee	Yes			
Cancellation	Trainee / TO / TOAD	Yes (initiated by trainee)	Yes		
Discharge	Trainee	Yes			
Extension	Trainee / TO / TOAD	Yes (initiated by trainee)	Yes		Trainee accept if initiated by TO / TOAD
Suspension	Trainee / TO / TOAD	Yes (initiated by trainee)	Yes		
Return from Suspension	Trainee	Yes			
Elective Modification	TO / TOAD		Yes	Yes (CA2025AA)	

USEFUL LINKS



TO Central & Support Queries: <https://saicatcms.zendesk.com/> (Link to Zendesk Queries)

TCMS: <https://my.saica.co.za/>

EAT: <https://assess.saica.co.za/>

Latest Training Regulations: <https://saicatcms.zendesk.com/hc/en-za/articles/43081718944017-SAICA-Training-Regulations>

**THANK
YOU**

**#DIFFERENCE
#MAKERS**

**CONNECT
WITH US**

QUESTIONS?

SAICA relocating from the current head office on
14 November 2025 to No.8 Anslow, Bryanston

Head Office

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SAICA International

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For more information

visit www.saica.org.za

