

EAT  
Enhancements  
101

April 2026

CAPABILITIES &  
ENDORSEMENTS

# AGENDA

1. Change to 2026 Training Regulations
2. EAT: Bimonthly LOR cadence
3. Recent enhancements to the EAT
4. Update on Queries
5. Q&A



 Please use the Q&A function for any questions



# Change in training regulations

## Annexure 2 Category D2.1.1

<b>D2.1</b>
<b>Learning Outcome Review</b>
1. Trainee accountants must submit at least one (1) LOR every two months. Training offices may require more regular submission.

From  
01 January  
2026

**Minimum:** at least one LOR every two months

Training office may set assessment policy for more regular submissions

# Key considerations: Bimonthly cadence

- The submission cadence (requirement) is **set at a training plan level**
- The submission requirement **cannot be edited directly on active training plans**; however, the existing plan can be duplicated and the requirement amended on the copied version
- Training Plans with a duration of **3-months cannot be set to a bimonthly** LOR submission period
- Trainees in **one office** can be on different training plans and thus have **different submission cadences**
- Training plan assignment to a trainee **can be changed multiple times** – new log available

# Limitation on bi-monthly cadence

Training Plans with a duration of **3-months** cannot be set to a **bi-monthly LOR** submission period.

Create a new Training Plan

The fields listed below are required to create a new training plan.

Name (Example: Default 3 year plan)

PDS period duration  3 Months  4 Months  6 Months

Number PDS periods in this training plan

LOR submission cadence  Monthly  Bimonthly

Note: Bimonthly cadence is not available for 3-month PDS duration.

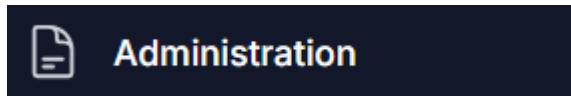
Training contract length (Years)

# Set the submission cadence for NEW training plans

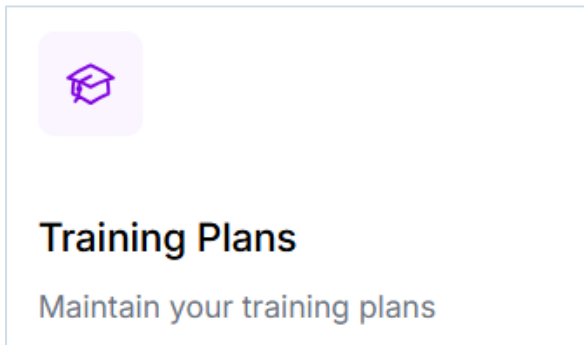


1. Log onto EAT (assess.saica.co.za)

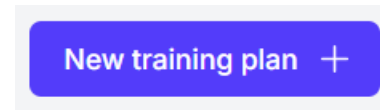
2. Click on the 'Administration' tab



3. Click on the 'Training Plans' tile



4. Click on 'New training plan +'

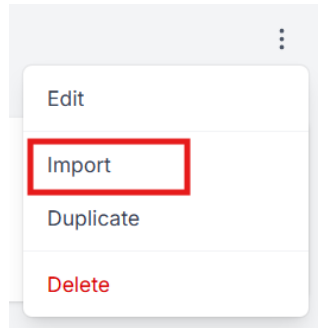


5. Complete the training plan details and select the relevant cadence

Training plans can only be edited/ updated by users with TO and TOAD roles

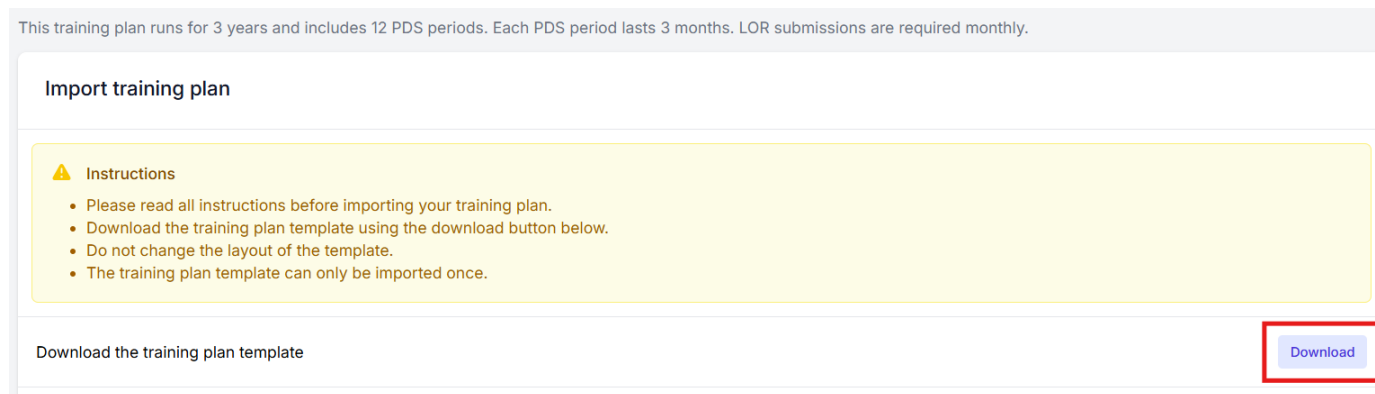
# Set the submission cadence for NEW training plans

6. Click on the 'three-dot' menu and click 'Import'



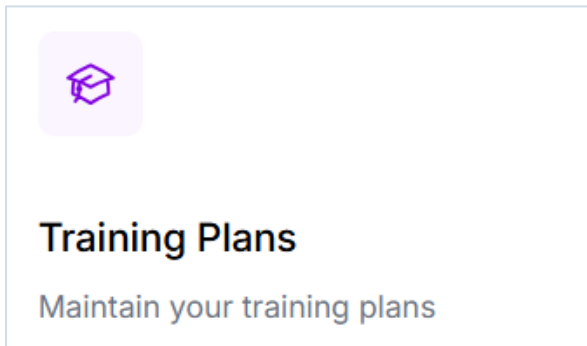
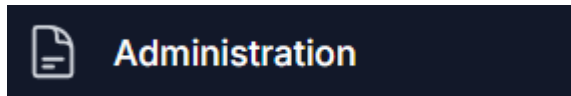
Downloading the latest training plan template

7. Click on the 'Download' button



# Update the submission cadence for EXISTING training plans

1. Log onto EAT (assess.saica.co.za)
2. Click on the 'Administration' tab
3. Click on the 'Training Plans' tile



4. Identify the plan you want to edit and click on the 'eye' icon.

Administration > Training plans

Training plans New training plan +

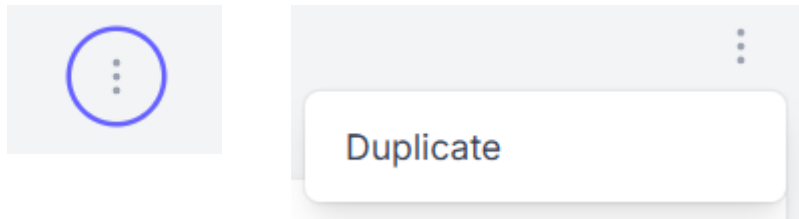
Active Archived

NAME	PDS DETAILS	STATUS	
2026-04-02 - Demo T Rate - Duplicate	6 periods 6 months per period - Bimonthly	Active Trainees: 2	👁️
01111111 Dec 2024	6 periods 6 months per period - Monthly	Active Trainees: 1	👁️
3	6 periods 6 months per period - Monthly	Active Trainees: 3	👁️
3 year plan	6 periods 6 months per period - Monthly	Active Trainees: 38	👁️

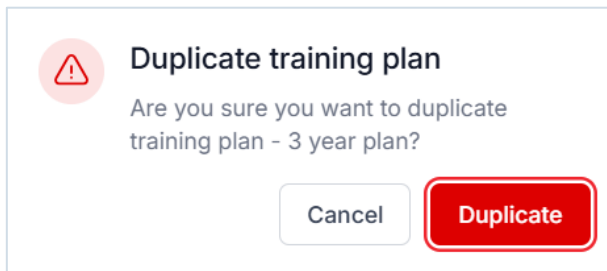
Training plans can only be edited/ updated by users with TO and TOAD roles

# Update the submission cadence for EXISTING training plans

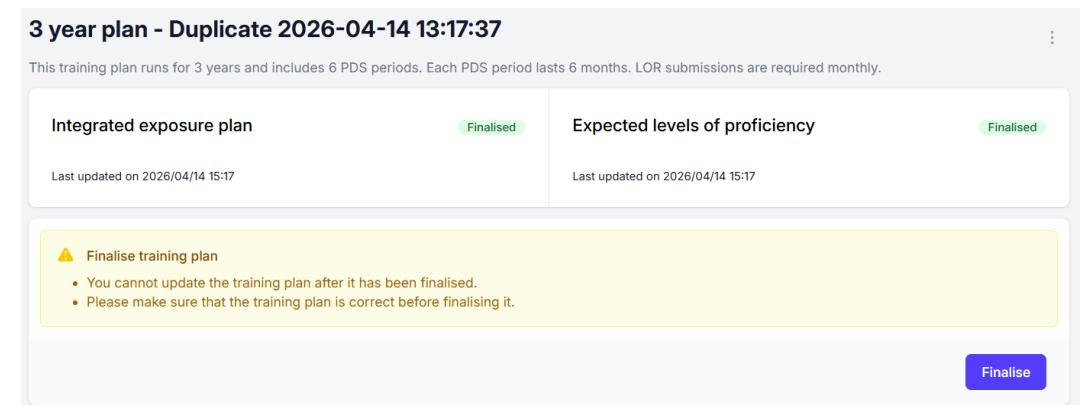
5. Click on the three-dot menu and select 'duplicate'.



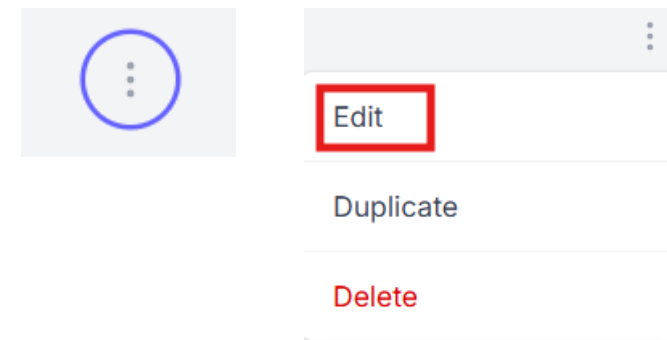
6. Confirm that you want to duplicate the plan by clicking on 'Duplicate'.



7. The plan will duplicate and automatically open the duplicated plan.

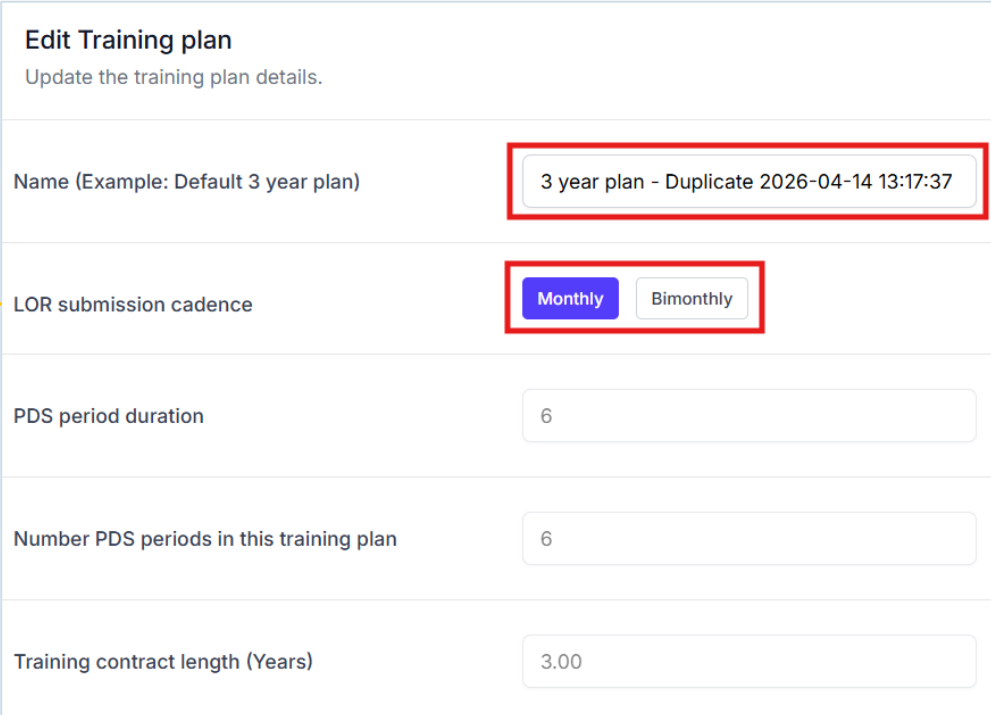


8. Click on the three-dot menu and select 'Edit'.



# Update the submission cadence for EXISTING training plans

9. Edit the plan name and select the applicable LOR submission cadence (requirement).



**Edit Training plan**  
Update the training plan details.

Name (Example: Default 3 year plan)

LOR submission cadence  Monthly  Bimonthly

PDS period duration

Number PDS periods in this training plan

Training contract length (Years)

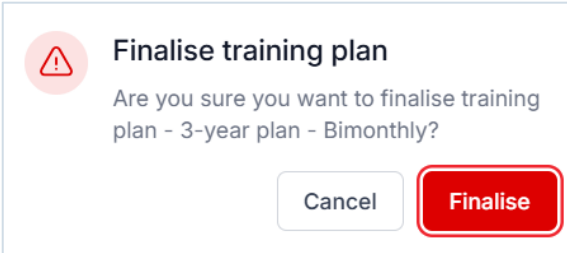
10. Click on 'Save'.

Save

11. Then click on 'Finalise'.

Finalise

12. Confirm that you want to finalise the plan by clicking on 'Finalise'.



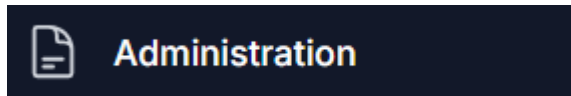
**Finalise training plan**  
Are you sure you want to finalise training plan - 3-year plan - Bimonthly?

13. Once you click Finalise, you will be directed back to the training plan list.

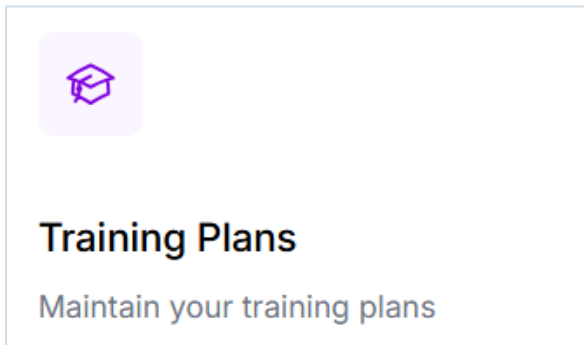
# Assigning the new / duplicated plan to trainees (Bulk Reassign)

1. Log onto EAT (assess.saica.co.za)

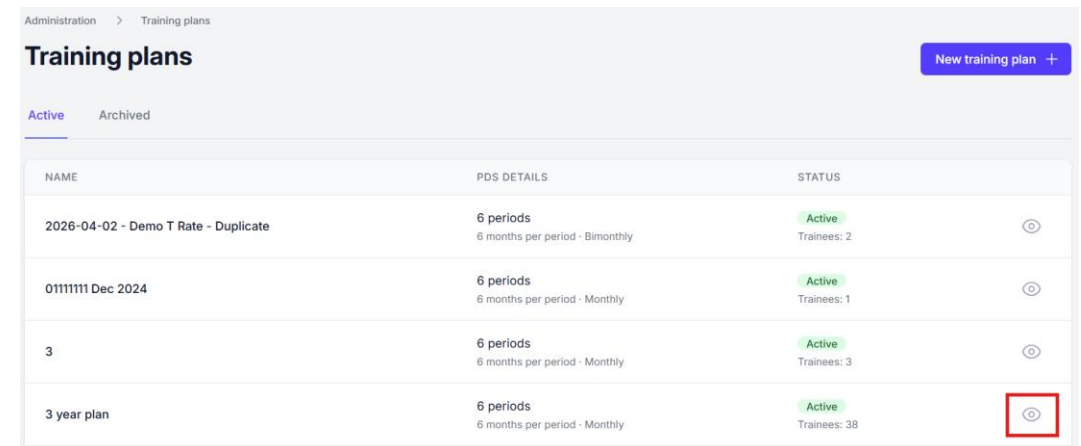
2. Click on the 'Administration' tab



3. Click on the 'Training Plans' tile



4. Identify the plan you want to edit and click on the 'eye' icon.

A screenshot of the "Training plans" interface. It shows a table with columns for NAME, PDS DETAILS, and STATUS. The table lists four training plans, each with an "eye" icon in the STATUS column. The "eye" icon for the "3 year plan" is highlighted with a red box.

NAME	PDS DETAILS	STATUS
2026-04-02 - Demo T Rate - Duplicate	6 periods 6 months per period - Bimonthly	Active Trainees: 2
01111111 Dec 2024	6 periods 6 months per period - Monthly	Active Trainees: 1
3	6 periods 6 months per period - Monthly	Active Trainees: 3
3 year plan	6 periods 6 months per period - Monthly	Active Trainees: 38

# Assigning the new / duplicated plan to trainees (Bulk Reassign)

## 5. Click on **Manage Trainees**

**3-year plan - Bimonthly**

This training plan runs for 3 years and includes 6 PDS periods. Each PDS period lasts 6 months. LOR submissions are required bimonthly.

Trainees assigned to this plan

0

Manage trainees

## 7. A list of trainees currently assigned to the "old" plan will display

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	
Test Test	1 / 6	2024-01-01	3-year plan - Bimonthly	👁️ ✎️ 🗑️
Test Tcms User -01	1 / 6	2024-09-01	3-year plan - Bimonthly	👁️ ✎️ 🗑️

## 6. From the dropdown, **select the plan that the trainees are currently assigned to**









3 year plan - Bimonthly

- 3 year plan
- 3 year plan - Bimonthly ✓
- 3 year plan Academic Trainee
- 4 year plan
- 5 year plan


# Assigning the new / duplicated plan to trainees (Bulk Reassign)

## OPTION 1: Reassign Trainees individually

- Click on the + (plus) icon

NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	
Bernice Abreu	2 / 6	2022-07-01	3 year plan	   
Do 07	6 / 6	2021-11-01	3 year plan	   

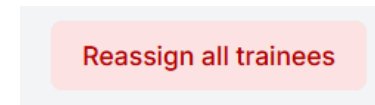
- Then confirm that you want to update the plan

**Update training plan**


Are you sure you want to reassign Bernice Abreu to training plan: 3-year plan - Bimonthly?

## OPTION 2: Reassign all trainees

- Click on the 'Reassign all trainees' button



- Then confirm that you want to update the plan

**Reassign trainees**

Are you sure you want to reassign all trainees on training plan "3 year plan" to training plan "3 year plan - Bimonthly"?

# Assigning the new / duplicated plan to trainees (**Bulk Reassign**)



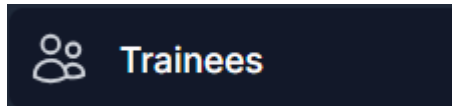
8. Once the reassignment is complete, you will see a green pop-up message, for example:

✓ 2 trainees reassigned to 3-year plan - Bimonthly.

# Assigning the new / duplicated plan to trainees (Individually per Trainee)

1. Log onto EAT (assess.saica.co.za)

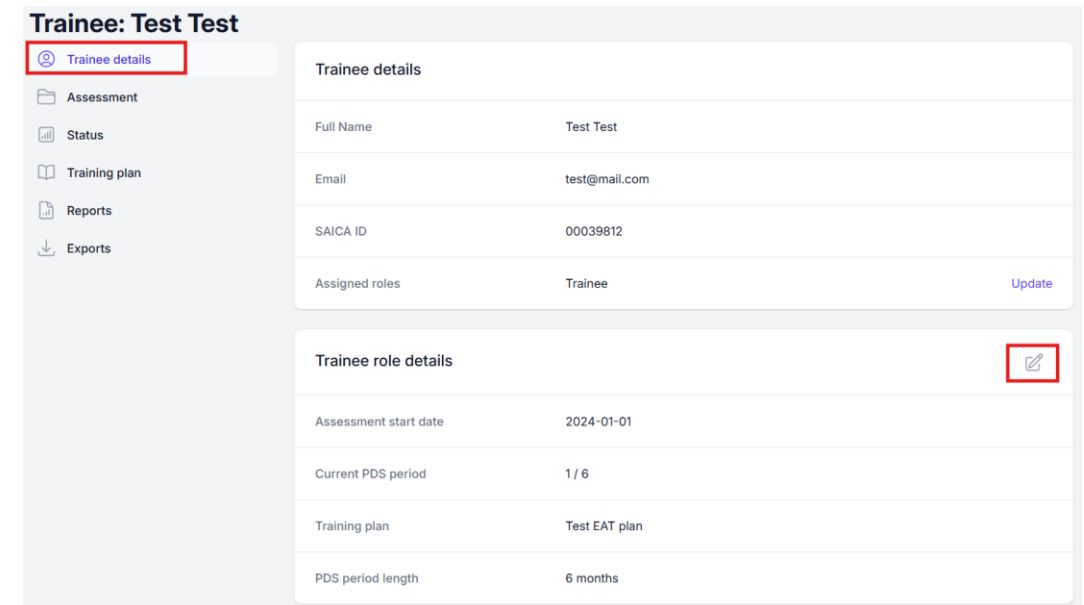
2. Click on the 'Trainees' tab



3. Find the trainee whose training plan you want to edit and click on the 'eye' icon.

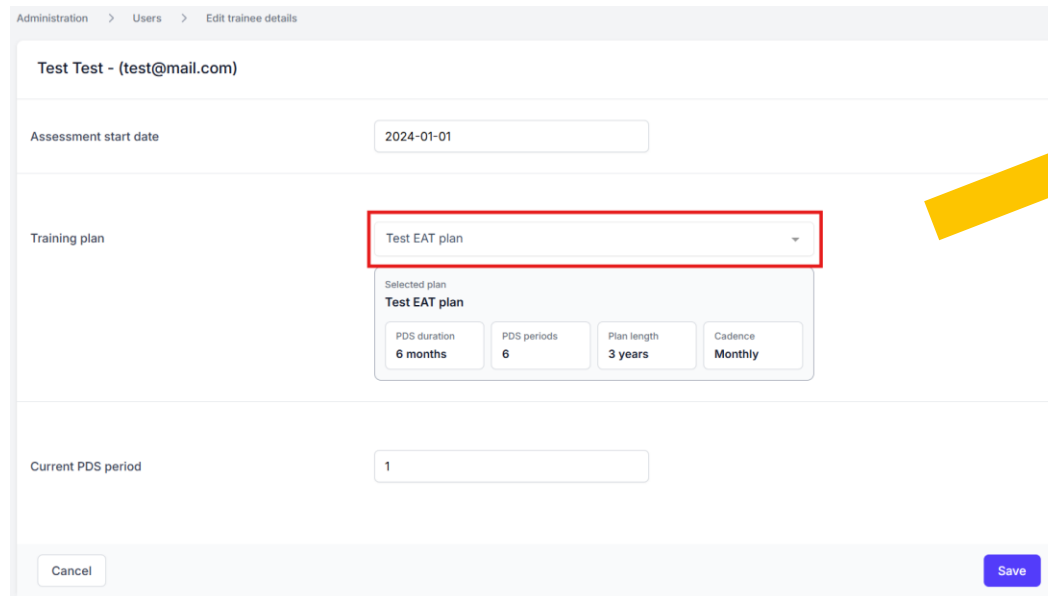
NAME	PDS PERIOD	ASSESSMENT START DATE	TRAINING PLAN	LATEST PDS SUBMISSION DATE
Test Test test@mail.com	1 / 6	2024-01-01	Test EAT plan	-

4. On the **Trainee details** tab, click on the pencil icon to edit the **Trainee role details**.

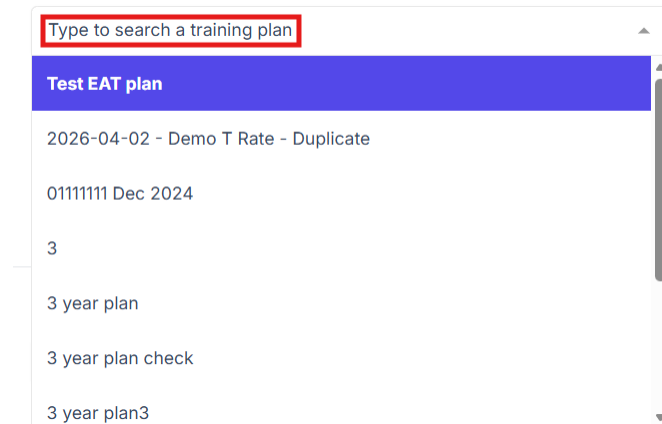
A screenshot of the 'Trainee: Test Test' details page. The page has a sidebar with navigation options: 'Trainee details' (highlighted with a red box), 'Assessment', 'Status', 'Training plan', 'Reports', and 'Exports'. The main content area is divided into two sections. The top section, 'Trainee details', contains a table with the following information: Full Name: Test Test; Email: test@mail.com; SAICA ID: 00039812; Assigned roles: Trainee (with an 'Update' link). The bottom section, 'Trainee role details', contains a table with the following information: Assessment start date: 2024-01-01; Current PDS period: 1 / 6; Training plan: Test EAT plan; PDS period length: 6 months. A pencil icon in the top right corner of the 'Trainee role details' section is highlighted with a red box.

# Assigning the new / duplicated plan to trainees (Individually per Trainee)

5. Select the new training plan name from the **Training plan** drop-down menu.



The screenshot shows the 'Edit trainee details' form for 'Test Test - (test@mail.com)'. The 'Training plan' dropdown menu is open, showing 'Test EAT plan' as the selected option. Below the dropdown, the 'Selected plan' details are displayed: 'Test EAT plan' with a PDS duration of 6 months, 6 PDS periods, a plan length of 3 years, and a cadence of Monthly. The 'Current PDS period' is set to 1. A yellow arrow points from the dropdown menu to the search results on the right.



The search results for training plans are displayed in a dropdown menu. The search bar contains the text 'Type to search a training plan'. The results list includes: 'Test EAT plan' (highlighted in blue), '2026-04-02 - Demo T Rate - Duplicate', '01111111 Dec 2024', '3', '3 year plan', '3 year plan check', and '3 year plan3'.

Note: Only the **first 20 active training plans** are displayed. You can search for a specific plan by typing the name of the plan after clicking on the dropdown menu.

# Assigning the new / duplicated plan to trainees (Individually per Trainee)



6. A **summary** of the plan details will be displayed:

Selected plan  
**3-year plan - Bimonthly**

PDS duration <b>6 months</b>	PDS periods <b>6</b>	Plan length <b>3 years</b>	Cadence <b>Bimonthly</b>
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7. Click on Save.



8. Confirm that the training plan has updated under the **Trainee role details**:

Trainee role details	
Assessment start date	2024-01-01
Current PDS period	1 / 6
Training plan	3-year plan - Bimonthly
PDS period length	6 months

# Training Plan assignment history

A log of changes to the training plan assigned to a trainee is available under the Training plan tab on the trainee's profile.

The screenshot displays the SAICA interface for a trainee's profile. On the left is a dark sidebar with navigation options: Dashboard, Trainees (highlighted with a red box), Monitoring, Administration, and Help Center. The main content area shows the breadcrumb 'Trainees > View trainee' and the trainee's name 'Trainee: Do 07'. Below the name are several tabs: Trainee details, Assessment, Status, Training plan (highlighted with a red box), Reports, and Exports. The 'Training plan' tab is active, showing the 'Current training plan' as 'Bimonthly' assigned on '2026-04-14'. A 'Hide history' button (highlighted with a red box) is located in the top right of the history section. The history is presented as a table with columns for 'Effective', 'Plan', and 'Cadence'.

Effective	Plan	Cadence
2024-10-24 → 2026-04-14	3 year plan	Monthly
2026-04-14 → 2026-04-14	3-year plan - Bimonthly	Bimonthly
2026-04-14 → 2026-04-14	3 year plan	Monthly
2026-04-14 → Ongoing	3-year plan - Bimonthly	Bimonthly

# EAT Dashboard



The Dashboard will show two separate tiles for the number of trainees who have not yet complied with the submission cadence based on the requirement per the training plan they are assigned to

**Dashboard**

Overview

Non-compliant trainees

Submission Cadence	Number of Trainees	Review Period
Monthly	15	Apr 2026
Bimonthly	37	Mar - Apr 2026

15 monthly-plan trainee(s) and 37 bimonthly-plan trainee(s) are missing a Learning Outcome Review for the current review periods.

[Open compliance overview >](#)

# LOR Compliance Report

Separate tabs for each submission cadence

Monitoring > Compliance

### Trainee compliance

This report shows the number of trainees who did not submit a Learning outcome review for each assessment period.

Monthly **Bimonthly** 2026

ASSESSMENT PERIOD	MISSING		
Jan 2026 2026-01-01 → 2026-01-31	53		
Feb 2026 2026-02-01 → 2026-02-28	53		
Mar 2026 2026-03-01 → 2026-03-31	53		
Apr 2026 2026-04-01 → 2026-04-30	15		
May 2026 2026-05-01 → 2026-05-31	Upcoming		
Jun 2026 2026-06-01 → 2026-06-30	Upcoming		
Jul 2026 2026-07-01 → 2026-07-31	Upcoming		

Monitoring > Compliance

### Trainee compliance

This report shows the number of trainees who did not submit a Learning outcome review for each assessment period.

Monthly **Bimonthly** 2026

ASSESSMENT PERIOD	MISSING		
Jan - Feb 2026 2026-01-01 → 2026-02-28	0		
Mar - Apr 2026 2026-03-01 → 2026-04-30	37		
May - Jun 2026 2026-05-01 → 2026-06-30	Upcoming		
Jul - Aug 2026 2026-07-01 → 2026-08-31	Upcoming		

# Feedback Summary in the PDS

Mixed Cadence

Feedback summary    Academic record    Technical experience    Proficiency in PVAAs    Development plan

**FEEDBACK SUMMARY** ● Initiated

A summary of LORs submitted and feedback received during the current PDS cycle.

Feedback summary table

Outside PDS period — Included evidence submitted before the PDS start date

changed training plan	Submitted: 2025-02-24	Reviewer: Leon Sporer	First review: 2026-04-02	Finalised: 2026-04-02	<a href="#">View</a>
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PDS period (monthly + bimonthly evidence)

Month	Monthly LORs	Bimonthly LORs
Jan 2026	—	Jan - Feb 2026
Feb 2026	—	—
Mar 2026	—	Mar - Apr 2026
Apr 2026	<b>Test Apr 2026</b> Submitted: 2026-04-02    First review: 2026-04-02    Finalised: 2026-04-02 Reviewer: Scottie Schuppe <a href="#">View</a>	<b>test</b> Submitted: 2026-04-02    First review: 2026-04-02    Finalised: 2026-04-02 Reviewer: Leon Sporer <a href="#">View</a> <hr/> <b>Test of new Acumen feedback field</b> Submitted: 2026-04-13    First review: 2026-04-13    Finalised: 2026-04-13 Reviewer: Leon Sporer <a href="#">View</a>
May 2026	—	May - Jun 2026
Jun 2026	—	—

# Feedback Summary in the PDS

Monthly Cadence

Feedback summary	Academic record	Technical experience	Proficiency in PVAAs	Development plan
<b>FEEDBACK SUMMARY</b> <span>Accepted</span>				
A summary of LORs submitted and feedback received during the current PDS cycle.				
Feedback summary table				
PDS period (monthly)				
Jan 2024	⊗ No LORs submitted in this period			
Feb 2024	Inventory Count for XYZ Limited		First review: 2024-02-26	<a href="#">View</a> Finalised: 2024-02-26
	Submitted: 2024-02-26 Reviewer: Scottie Schuppe			
Feb 2024	Year end inventory count in Cape Town for XYZ Limited		First review: 2024-02-27	<a href="#">View</a> Finalised: 2024-02-27
	Submitted: 2024-02-27 Reviewer: Scottie Schuppe			
Mar 2024	⊗ No LORs submitted in this period			
Apr 2024	⊗ No LORs submitted in this period			

# Feedback Summary in the PDS

Bi-Monthly Cadence

NEW!

Feedback summary	Academic record	Technical experience	Proficiency in PVAAs	Development plan	Conclude
<b>FEEDBACK SUMMARY</b> <span style="float: right;">● Initiated</span>					
A summary of LORs submitted and feedback received during the current PDS cycle.					
Feedback summary table					
Outside PDS period — Included evidence submitted before the PDS start date					
Inventory Count for XYZ Limited <span style="float: right;"><a href="#">View</a></span>					
Submitted: 2024-02-26		First review: 2024-02-26		Finalised: 2024-02-26	
Reviewer: Scottie Schuppe					
Year end inventory count in Cape Town for XYZ Limited <span style="float: right;"><a href="#">View</a></span>					
Submitted: 2024-02-27		First review: 2024-02-27		Finalised: 2024-02-27	
Reviewer: Scottie Schuppe					
SAICA Induction training (July intake) <span style="float: right;"><a href="#">View</a></span>					
Submitted: 2024-07-25		First review: 2024-07-25		Finalised: 2024-07-25	
Reviewer: Scottie Schuppe					
Test LOR <span style="float: right;"><a href="#">View</a></span>					
Submitted: 2025-09-30		First review: 2025-09-30		Finalised: 2025-09-30	
Reviewer: Scottie Schuppe					
PDS period (bimonthly)					
Jan - Feb 2027	⊗ No LORs submitted in this period				
Mar - Apr 2027	⊗ No LORs submitted in this period				
May - Jun 2027	⊗ No LORs submitted in this period				

# Enhancements on EAT – implemented

Hiding the removed  
PVAA learning  
outcomes

Deleting  
assessment  
instruments

Exporting LORs &  
PDSs

New Report: Export  
of PVAA evidence

Consolidated view  
of assessment  
forms requiring  
action

Role-players can  
view all assessment  
forms linked to their  
EAT profile

Ratings awarded  
now show the path  
selected per the  
decision tree

Discharge Process  
enhancement

Monitoring Reports

Enhancements  
related to levels of  
proficiency

Various user  
interface  
improvements

# Delete LOR & PDS

## Trainee: Jon Lakin

### Learning Outcome Review

Training Plan: 4 year plan  
Submission period: Feb 2024  
PDS period: 1 of 12

Description  
Test LOR \_ Zander

Technical context

Trainee:  
Reviewer:

Reviewed

Export

History

Reassign

Delete

## Trainee: Vonda Johnson

### Professional Development Summary

Training Plan: 5 year plan  
PDS period: 4 of 20

Period  
2022-01-02 to 2022-03-02

Submitted by evaluator for assessment

Export

History

Reassign

Delete

Feedback summary

Academic record

Technical experience

Proficiency in PVAAs

# Delete LOR & PDS

## Delete Professional Development Summary

✘ Delete Professional Development Summary?

You are about to delete the Professional Development Summary. This action is permanent and cannot be reversed.

Reason

Reason to be provided

Cancel

Delete

# Who can delete LORs/PDSs when?

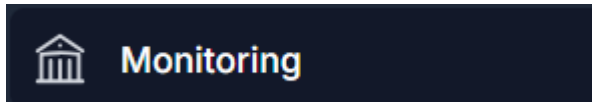
LOR Status	Trainee	TO / TOAD
Initiated	Yes	No
Submitted / Requested Revision / Reviewed	No	Yes
Finalised	No	No

PDS Status	Trainee	Assessor	TO / TOAD
Initiated	Yes	No	No
Submitted / Requested Revision / Assessed	No	No	Yes
Evaluated (i.e. PDS on assessor dashboard)	No	Yes	Yes
Finalised	No	No	No

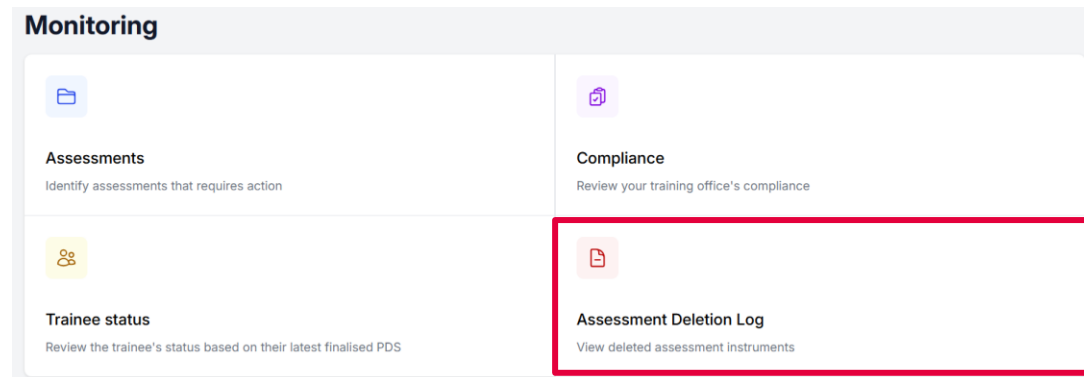
# Deleted Instruments log

1. Log onto EAT (assess.saica.co.za)

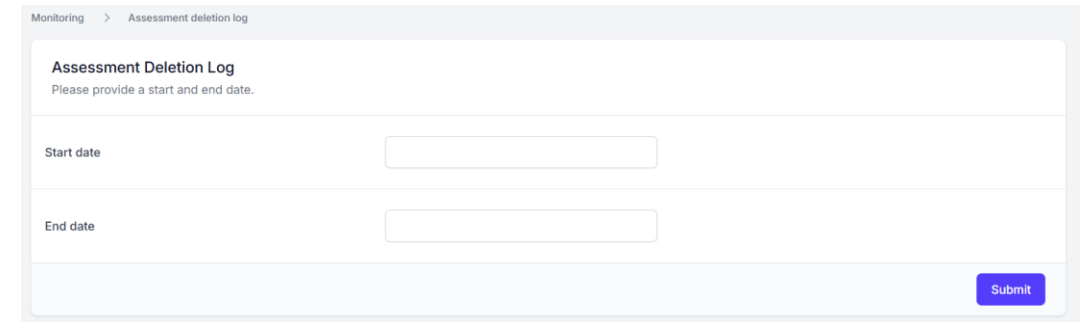
2. Click on the 'Monitoring' tab



3. Click on 'Assessment Deletion Log'



4. Enter the period



# Deleted Instruments log

Monitoring > Assessment deletion log

### Assessment Deletion Log

Please provide a start and end date.

Start date: 2026-02-01

End date: 2026-04-20

Submit

Download

DELETED AT	INSTRUMENT	TRAINEE	DELETED BY	REASON FOR DELETION
2026-04-20 1 hour ago	PDS PDS period: 1, Dates: 2024-01-01 - 2024-04-01, Plan: ...	Jon Lakin Status: Active SAICA ID: 19	Randall Ebert Training Office Administrator SAICA ID: 6	Reason to be provided

# Export LOR & PDS

## Trainee: Jon Lakin

### Learning Outcome Review

Training Plan: 4 year plan  
Submission period: Feb 2024  
PDS period: 1 of 12

Description  
Test LOR \_ Zander

Technical context

Trainee:  
Reviewer:

Reviewed

Export

History

Reassign

Delete

## Trainee: Vonda Johnson

### Professional Development Summary

Training Plan: 5 year plan  
PDS period: 4 of 20

Period  
2022-01-02 to 2022-03-02

Submitted by evaluator for assessment

Export

History

Reassign

Delete

Feedback summary


Academic record


Technical experience


Proficiency in PVAAs


# Cumulative PVAA evidence export

## Trainee: Test Trainee1

 Trainee details

 Assessment

 Status

 Training plan

 Reports

 Exports

### PVAA evidence export

Export PVAA evidence linked to this trainee.



### Assessment record over time

Download the assessment record over time for this trainee.



# Cumulative PVAA evidence export



LOR	Submitted date	Type	Nr	Learning outcome	Evidence trainee	Accepted (PVA) / Rating (EA)	Reviewer comment	Included in PDS	Rating in that PDS
Accusamus totam facilis. Consectetur consequatur eligendi. Asperiores assumenda.	01-Nov-19	PVA	II.2 a)	Consider the impact of ethics within a specific business environment (a client or your training office) AND evaluate how ethics is managed in that context	Est eveniet at. Ducimus et repellat. Assumenda ducimus quo. Quia iure ipsam. Nam tempore adipisci.	Accepted	Paritatur fuga quod. Voluptatum voluptatem dolorum. Doloremque exercitationem eos. Deleniti consequa.	1 of 6	Level 0   Path L
Accusamus totam facilis. Consectetur consequatur eligendi. Asperiores assumenda.	01-Nov-19	PVA	II.2 b)	For a business decision, weigh up the short-term financial benefits of that decision against its long-term strategic and/or societal impact (sustainability).	Voluptates officia animi. Labore fuga est. Tempore voluptatem fugiat. Quam laborum fugiat. Totam at.	Accepted	Consequatur id optio. Ut quia error. Quisquam recusandae molestiae. Accusamus quo quasi. Fugiat quo.	1 of 6	Level 0   Path L

# Consolidated view of Assessment Forms requiring action



PricewaterhouseCoopers - Johan... ^

Search training office

Showing top results. Search to find other training offices.

Ernst & Young Inc - Cape Town  
LOR: 2

PricewaterhouseCoopers - J... Current  
No assessment actions required

Switching training offices will refresh your context.

Account

Change training office

Sign out

## Training offices

All the training offices that you have access to are listed below.

Start typing to search

ID	NAME	ACTION REQUIRED	
03041331	Ernst & Young Inc - Cape Town	LOR: 2	👁
03036051	PricewaterhouseCoopers - Johannesburg <span>Signed in</span>	No assessment actions required	👁

# View all assessment forms linked to profile



## Dashboard

### Learning Outcome Reviews in progress

STATUS	DETAILS	
<a href="#">Reviewer reassigned by Training Office Administrator</a> 2026-02-09	Abraham Lemke 111	Awaiting Trainee
<a href="#">Reviewed</a> 2025-06-24	Jon Lakin Test LOR _ Zander	Awaiting Trainee
<a href="#">Submitted for review by trainee</a> 2025-01-27	Jon Lakin New Reviewer Demo _ Jan 2025	Action required
<a href="#">Submitted for review by trainee</a> 2023-05-12	Abraham Lemke Client Name & Engagement/work done	Action required
<a href="#">Reviewed</a> 2022-05-26	Abraham Lemke Year end Audit of XYZ (Pty) Ltd - February 2022	Awaiting Trainee

# Update on Queries

#DIFFERENCE  
#MAKERS

±600

queries received on  
Zendesk per month

6 hours

first reply

40 hours

full resolution time

<https://saicatcms.zendesk.com/>

[support@saicatcms.zendesk.com](mailto:support@saicatcms.zendesk.com)

When emailing queries to Zendesk, please do not include [support@saica.co.za](mailto:support@saica.co.za).

THANK  
YOU

#DIFFERENCE  
#MAKERS

QUESTIONS?

 CA(SA)  AGA(SA)  AT(SA)

