

The Institute of Chartered Accountants of India

FAQs for Self Service Portal for Students & Members – E Diary Recommendatory Release

What is Self Service Portal for Students and Members?

The "Self Service Portal for Students & Members" is a powerful tool providing students & members with the facility to view and update personal information via the web without having to go to the ICAI office. The functionality of this portal spans through the entire Students and Members' Management system, making information available anywhere, anytime. All information is subject to Institute's defined regulations/ policy, allowing the students and members to view and update the information he / she is authorized to view/update.

Features:

- Student/Members can view/update personal information
- Defined access rules as per ICAI Regulation
- Can edit certain information online in case no proof of document required by the Institute
- Centralized online system of getting mails from Institute in "My Inbox"
- Complete end to end process for students and members lifecycle
- Provision to track status of Forms (Online + DAK) submitted to the institute.
- Provision to download documents like Regulatory Forms, Mark sheets for certain courses, Letters and Certificates (which are of normal nature) etc.
- Displaying Institute Notifications/Information categorized on the basis of user role (i.e. Student or Member).
 - Chartered Accountant Course
 - Accounting Technician Course
 - BOS Knowledge Portal
 - BOS Announcements
 - Events
 - Committee Events
 - Exam Announcements
 - ICAI Journals etc.
- Online submission of Regulatory form (Student /Member/Firms/Network /MCS/LLP) with digital signature and upload scan copy feature.
- Implementation of E-Diary to capture Articled training details
- Integration with various ICAI applications such as :
 - Student & Member Management System (SMM)
 - Examination Portal
 - ICAI.ORG

- Grievance Management System (GMS)
- Online Store (OLS)
- E-Library (ELB)
- E-Learning (ELM)
- Peer Review System
- Postal Communication System (PCM) etc

What is Self Service Portal for Students & Members –E Diary?

It is meant for maintaining training records to ascertain progress of the Articled/Audit/Industrial trainees. It provides a new 'E-Diary (Student's Work Diary) online system' which aims to enhance the practical education and training of Article/Audit trainees and Industrial Trainee, through a mechanism of capturing the work done by students, reviewed by Principal, alerts for due dates and monitoring at the Institute level.

What is the scope of Self Service Portal - E Diary recommendatory release?

Students and Members would be able to "view" their Personal Information and Educational details, as available under the Institute's database. SSP also enables students and members to access E-Diary concept on all-India basis. The Self Service Portal is a web based application which enables students and members to also view their personal information like – Name, Correspondence & Permanent Address, Date of Birth, Father's Name, Member's Student Registration No. , Enrolment Date, Contact Details etc. as available under the Institute's database.

Who are eligible for maintaining Work Diary – “E-Diary”?

Eligible Articled/Audit Assistant/Industrial Trainees, registered under Articleship/ Industrial training with the Institute as per ICAI Regulation 46 and 51.

What is the date of SSP E- Diary Recommendatory release?

The date for Self Service Portal- E Diary Release would be announced shortly on the Institute Website at www.icai.org and would be published in "The Chartered Accountant" and "The Chartered Accountant Student" journals.

What is the URL for accessing the Self Service Portal -E Diary release?

The announcement relating to URL/ link to access the Self Service Portal for students & members -E-Diary release would be provided shortly on the Institute Website at www.icai.org.

How to login to Self Service Portal?

Steps to be followed for Log In for Students & Members:

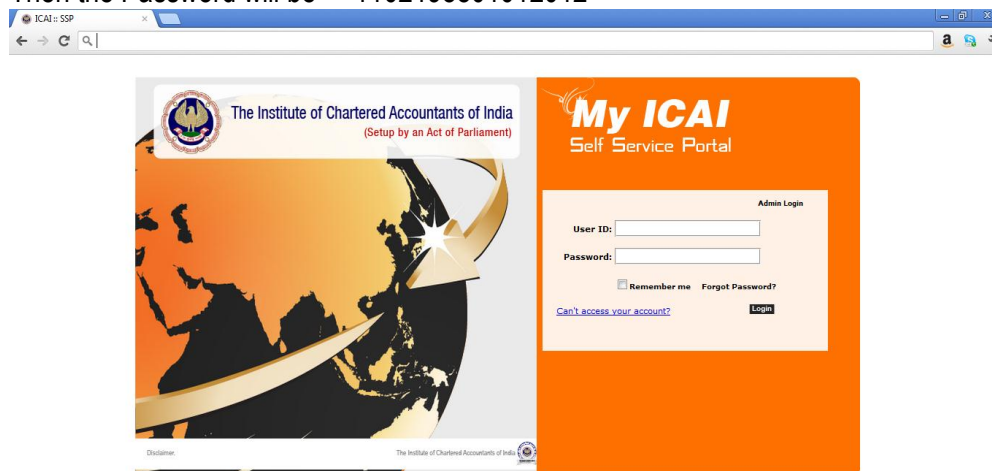
1. Enter User ID as "Student Registration No." (for students) and "Membership Number" (for members)
2. Enter Password for Students : as combination of "Date of Birth" & "Initial Registration no. with Institute" i.e first time the student registered for any course with the Institute

and for Members : as combination of "Date of Birth" & "Membership Enrolment Date (i.e. date on which you are registered as Associate Member with the Institute as mentioned under the certificate"

For example:

If the Date of Birth is 11/Feb/1988 & Membership Enrolment Date is 01/Jan/2012

Then the Password will be – "1102198801012012"



3. On First time login, Student/Member is required to reset his/her password, as shown below.

Note: New Password should be of minimum 6 digits

The image shows a web form titled "Reset Your Password". It contains several input fields: "Email ID" (with the value "usermail@gmail.com"), "MobileNo." (with the value "123456789"), "Old Password" (masked with dots), "New Password" (masked with dots), and "Confirm New Password" (masked with dots). Below the "New Password" field is a strength indicator showing a yellow bar and the word "Weak". Below the "Confirm New Password" field is a CAPTCHA image showing the code "P3V04". Below the CAPTCHA is a text input field with the value "P3V04" and a label "Enter the above code here:". At the bottom of the form are two buttons: "Submit" and "Go to Login". A link "If can not Read Try Different words." is also present.

- System will automatically pick the Email ID & Mobile No. of a student/ member if already available under the Institute's database.
- If required, a student /member can change/update his/her Email ID & Mobile No. by entering new/updated details.

- A Student/Member can click on “If cannot read Try Different word” link in case unable to read displayed “Captcha Code”.
- A Student/Member is required to enter details in all the fields and Click Submit button to save the new password.
- On successful transaction, message will be displayed a “Password Reset Successfully. Please login again”
- Click on “Go to Login” button to navigate to the Login Screen
- Enter the User ID (as SRN no./Membership No.) and new reset Password
- A Student/ Member can Select Remember Me Checkbox, if he/she wants to save his/her credentials for the next login.

What activities are covered in SSP E Diary recommendatory release for Students doing Articleship?

The List of functionalities available under Student “My Training” tab:

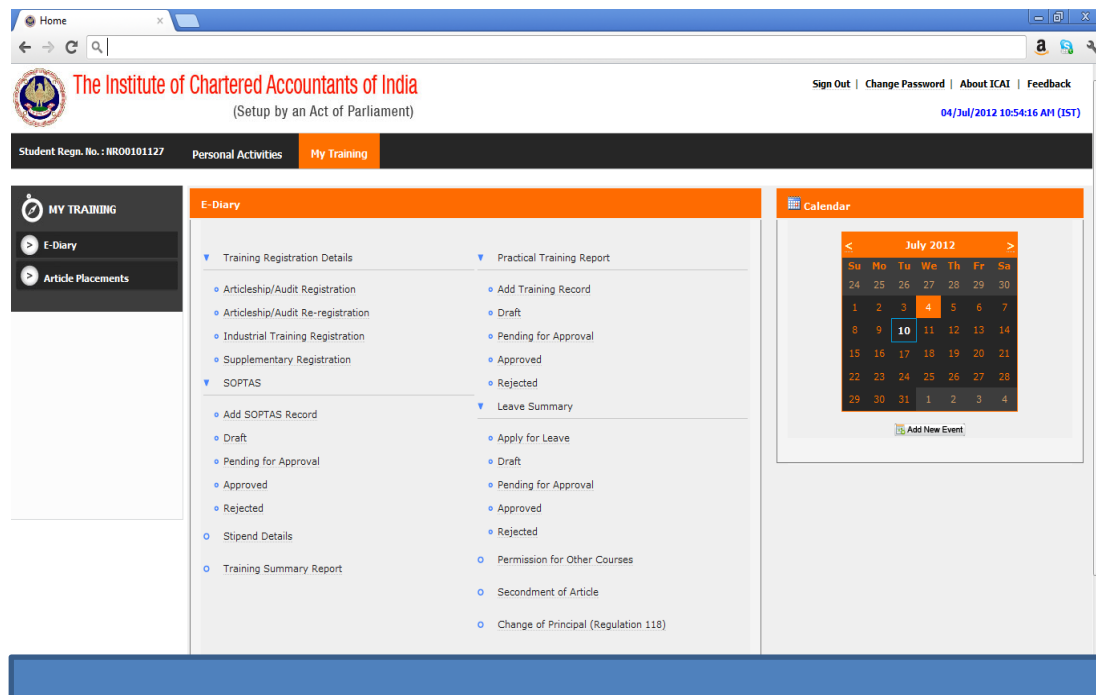
1. E-Diary Dashboard
2. Training Registration Details
 - Articled/Audit Registration
 - Articled/Audit Re-Registration
 - Industrial Training Registration
 - Supplementary Registration
3. Practical Training Report
 - Add Training Record
 - Draft
 - Pending for Approval
 - Approved
 - Rejected
4. SOPTAS (Summary of Professional and Other Training Programs Attended by Students)
 - Add SOPTAS
 - Draft
 - Pending for Approval
 - Approved
 - Rejected
5. Leave Summary
 - Apply Leave
 - Draft
 - Pending for Approval
 - Approved
 - Rejected
6. Stipend Details

7. Other Courses
8. Calendar View

What activities are covered in SSP E Diary Recommendatory Release for Members under SSP E Diary?

The List of functionalities available under Member's SSP E Diary-“Articles Training” tab :

1. E-Diary Dashboard
2. Articles Registration Details
 - Articled/Audit Trainees
 - Articled/Audit Re-Registration Trainees
 - Industrial Trainees
 - Supplementary Trainees
3. Articles Work Diary
 - Pending for Approval
 - Approved
 - Rejected
4. SOPTAS (Summary of Professional and Other Training Programs Attended by Students)
 - Pending for Approval
 - Approved
 - Rejected
5. Articles Leave
 - Pending for Approval
 - Approved
 - Rejected
6. Articles Stipend Details
 - Add Stipend Details
 - View Stipend Details
7. Permission for Other Courses
8. Calendar View



What are the rules applicable for SSP E Diary recommendatory release?

E-Diary Rules:

1. Student must file E-Diary entry within 30 days. That is, a student must fill his/ her Practical Training/E-Diary record by 30th January for work done on 1st January. System would mark entries submitted after 30 days of duration as late entry into the system.
2. Student would be allowed to modify entries till they are approved by the Principal.
3. E-Mail & SMS reminders/alerts will be sent periodically to Student and his Principal in case the e-diary is not filled.
4. E-Mail & SMS reminders/alerts will be sent to Principal for "Pending for Approval" e-diary/Leave/SOPTAS records :
 - i. First reminder to Principal in case the request is not entertained for 14 days.
 - ii. Second reminder to Principal in case the request is not entertained for 28 consecutive days.
 - iii. Final reminder to Principal in case the request is not entertained for 30 consecutive days.
5. System will approve the pending request (E-Diary/SOPTAS/Leave) automatically in Case it is not entertained by the Principal for 30 consecutive days.
6. Number of working hours in a week shall not exceed more than 35 hrs. However, this restriction will be removed in mandatory release(Please see point no. 3 of mandatory release)
7. Training record start time shall not be before 9 AM. Similarly, Training record end time shall not be after 7 PM (as per the Guidelines). However, this restriction will be removed in mandatory release (Please see point no. 3 of mandatory release)

8. No duplicate entries are allowed for same date & time duration. For example – if a E-Dairy record already exists in approved status for 15th May 2012 from 9 AM to 5 PM, no other E-Diary record shall be allowed to entered.

Also, no E-Diary record shall be allowed to enter for the date on which a leave / SOPTAS record already exist.

9. Principal must enter the stipend details for a month before the last day of the consecutive month.

For example – Stipend details for the month of April shall be entered into the system before 31st of May.

10. Confirmations (i.e. approval/rejection) of work perform by student during Secondment of Articled/Audit Assistant shall be done by the main Principal.

Who can approve your work diary entries?

Principal Member, under whom the Article/Audit/ Industrial Trainee is registered as per “Articleship Deed”

What is SOPTAS in SSP E Diary Recommendatory release? SOPTAS (Summary of Professional and Other Training Programs Attended by Students)

For Students: This section will allow a student to view and create SOPTAS record under SSP Portal. Regulation 59(7) specifies that the attendance by a trainee, with the consent of the Principal, at a conference, course or seminars organized by the Institute, including a Regional Council or a Students’ Association or a Branch of a Regional Council for the benefit of students, is treated as a part of the training period actually served. The details of the Seminars/Conferences attended by the student should be submitted in the form of SOPTAS record.

This section will allow an Article Assistant to view details for following categories:

- Add SOPTAS Record
- Draft
- Pending for Approval
- Approved
- Rejected

For Members: This section will allow a member to view and respond to SOPTAS record submitted by an Article/Audit for approval. Regulation 59(7) specifies that the attendance by a trainee, with the consent of the Principal, at a conference, course or seminars organized by the Institute, including a Regional Council or a Students’ Association or a Branch of a Regional Council for the benefit of students, is treated as a part of the training period actually served. The details of the Seminars/Conferences attended by the student should be submitted in the form of SOPTAS record.

A member, when login to the work diary page, can see following SOPTAS entries:

- Pending for Approval

- Approved
- Rejected

SOPTAS Records Rules:

1. A student can submit SOPTAS record for past and today's dates.
2. No duplicate entries are allowed for same date & time duration. For example – if a SOPTAS record already exists in approved status for 15th May 2012, no other SOPTAS record shall be allowed to enter.

Also, no SOPTAS record shall be allowed to enter for the date on which an E-Diary / Leave record already exist.
3. E-Mail & SMS reminders/alerts will be sent to Principal for “Pending for Approval” leave records :
 - a) First reminder to Principal in case the request is not entertained for 14 days.
 - b) Second reminder to Principal in case the request is not entertained for 28 consecutive days.
 - c) Final reminder to Principal in case the request is not entertained for 30 consecutive days.
4. System will approve the pending request automatically in case it is not entertained by the Principal for 30 consecutive days

What other major activities would be taken up in Mandatory Release of SSP E Diary?

1. Leave details of Terminated cases for existing students already registered with Institute
2. Attendance Summary having details of “Current Attendance”; “leave taken”; “Excess Leave”; “Balance Leave”; “Eligible Leave”.
3. Noting for extra hours worked during a week, beyond 35 hours with Exceptional Reporting.
4. Downloading facility in PDF and Excel for –a. Work Diary, b. Leave records, c. SOPTAS record, d. Stipend details and Training Summary Report
5. Pictorial representation of nature of work performed by article student
6. Information to be reflected on Member's E Diary Dashboard– Vacancy Details as on date along with Additional Vacancy, as per regulations would be reflected in the SSP E Diary
7. Condonation Details for Articleship registration and “Permission for other courses” as per Institute's Database
8. ‘Secondment of Articles’ and ‘Change of Principal (Regulation118)’ functionality would be provided in the mandatory release.

Where to look up for any clarifications or queries relating to “My Profile / Educational Details or E Diary” in SSP E Diary Recommendatory release?

“Contact Us” List would be provided where Student and Member can contact with their respective region for any query raised or clarification required.

Also in recommendatory release we would be providing "Student and Member's User Manual" which explains the step by step procedure for SSP E Diary.

Where to provide feedback for Self Service Portal E Diary Recommendatory Release?

By clicking on the Tab of "Feedback Form" on "My Profile" Page.