

An in-depth guide to transferring to membership



The quickest and simplest way to ensure a smooth transition from trainee to member is to record your practical experience requirement (PER) in the trainee development matrix (TDM). All you will need to do once you have met the membership requirements is accept the invitation to transfer to membership from ACCA – a significantly faster way to become an ACCA member than if you submitted an online or manual membership application.

Here's an explanation of how the process works and also some hints and tips on how you can make it hassle-free.

ACCA will invite you to transfer to membership once the TDM indicates that you have:

- completed the Professional Ethics module (where required)
- recorded 36 month's time in a relevant role using the PER return
- and either answered the challenge questions for 13 performance objectives (all 9 Essentials and any 4 from Options) and had these signed off by your workplace mentor

or

- are exempt from completing the TDM as agreed by your gold or platinum ACCA Approved Employer –Trainee Development stream

or

- you have 'banked' your complete and signed-off Student Training Record (STR).

If you have met the above criteria, you will be sent an email and a letter inviting you to transfer to membership. To ensure that you receive your invitation, please visit *myACCA* to check that your contact details are up to date.

The majority of transfers are completed quickly and easily, taking approximately 10 days from our receipt of your acceptance.

You will be required to reply 'YES' or 'NO' to the invitation. If you reply 'NO' to the invitation, you are expected to provide your reason for not wanting to transfer at this time and give an indication when you think you will want to transfer. If you reply 'YES' you are accepting the declaration and agreeing to pay the membership admission fee.

Additional information will also be required if you fall into any of the following categories:

Further information required on lecturing experience

Lecturing experience can be used towards the PER for membership up to a maximum of 12 months. The experience must be at a level at least equivalent to the Fundamentals level of the ACCA Qualification, covering basic accounting, business studies and finance related subjects. If you are including lecturing experience towards the PER, please ensure you provide detail on the subjects and level taught together with your application form.

Further information required on part-time experience

Work experience gained on a part-time basis can only count towards the PER for membership on a pro-rata basis. ACCA considers full-time work experience to be 140 hours per month. 1,540 hours of part-time work equates to 12 months of full-time work experience – this discounts annual leave, etc. If you're including part-time experience towards the 36-month requirement, please provide a breakdown of any part-time hours worked with your application.

Further information required if working in public practice

If you work in public practice and you sign or produce any accounts or report or certificate or tax return concerning any person/organisations financial affairs that may be relied upon by a third party you are required to include a current job description together with your application.

Components missing?

Some of you may not have completed all of the requirements for membership, in which case we will write to you with a personalised overview of your status and advice on what your next steps should be. These include:

TDM incomplete

If you're using the TDM to record your relevant experience, you must ensure that you answer the challenge questions for each performance objective achieved and have your answers reviewed and verified by a workplace mentor. It's not sufficient to simply mark objectives as 'Achieved' in the PER return. If you have recorded your experience using the paper-based TDM – because you don't have access to *myACCA* – please notify ACCA at the time of submitting your application.

36 months experience

In order to be eligible to apply for admission to membership you are required to demonstrate that you have obtained at least 36 months of acceptable, supervised, practical experience in an accountancy role. Please make sure that the details of all periods of employment relating to your 36 month's experience have been recorded in the 'Your employer' section of the TDM. Your transfer to membership may be delayed if you do not do this.

If you have recorded less than 36 months' experience within your PER you will be asked to submit a further PER return to bring your records up to date. If you cannot confirm that you have completed 36 months' experience, you will have to wait until you have attained the further months required to complete this component, and then submit a further PER return through *myACCA*.

Banked STR

Some of you will have completed your relevant experience using the STR forms. The current membership application form no longer includes reference to the STR competences. So, if you have banked a complete STR please submit a copy (not the original) of your STR along with your application. We will then assess this, and if this meets the required competences, we will

complete your transfer to membership. Also, if you do not have enough elements we will provide you with tailored information on which objectives within the TDM should be completed which will fulfil the requirements for membership.

Not eligible for TDM exemption

Only trainees working for a gold or platinum ACCA Approved Employer – Trainee Development stream, where the employer has agreed to the trainee claiming exemption, are eligible to claim exemption from completion of the TDM. You must check your eligibility with your employer before you submit a PER return or membership application to ACCA. Evidence that you are exempt from completing the TDM is required, so please complete and return the Approved Employer TDM exemption confirmation form in support of your application. This form is available from *ACCA Connect*.

Ethics Module

If you registered or re-registered as a student with ACCA on or after 1 January 2007, you are also required to complete the Professional Ethics module in addition to attaining the relevant practical work experience.

We will check your eligibility to complete the module and request that you do so if required. The Professional Ethics module is accessible through your *myACCA* account.

Think you're ready and want to apply for membership?

If you think you've satisfied the requirements for admission to membership, you do not need to wait to receive an invitation to transfer. You can apply online through [myACCA](#) or [download](#), complete and submit a membership application form to ACCA 2 Central Quay, 89 Hydepark Street, Glasgow G3 8BW, United Kingdom. Please note that an online or manual membership application can take approximately four to six weeks to process. However if you update your TDM records to meet the membership requirements, you should receive your email invitation within a couple of weeks and could be transferred to membership within a further 10 days. A much quicker and smarter option!

Factors which may delay your transfer to membership

Your transfer to ACCA membership will not take place if your account is showing a debit balance greater than your current year's annual subscription, so please make sure your payments are up to date before you reply 'YES' to your invitation.

The simplest and quickest way to submit fees is online through [myACCA](#) – ACCA's recommended method for submitting payments.

You will need your password to access *myACCA*. If you have forgotten this:

- visit the forgotten password section at *myACCA*
- answer the personal information questions
- a new password will be emailed within two hours.



The following credit or debit cards are accepted:

- Visa, MasterCard, AMEX and Maestro.
- pre-paid debit card (for online payments only). Contact your [local ACCA office](#) to find out if a pre-paid card scheme is available in your area.

Using this method allows you to make payment to ACCA in sterling whilst receiving details of your payment from your credit card provider in your local currency. Please check with your credit card provider to ensure this facility has been enabled on your card. [Further alternative payment options](#) are available if you need them.

PER audit

To quality assure the PER process and protect the integrity of the ACCA Qualification, ACCA carries out PER audits – a review of the practical experience attained for ACCA membership. You will be notified if you are selected for a PER audit as this may result in your transfer to ACCA membership being delayed. ACCA would like to thank you in advance for your cooperation.

We are committed to helping you achieve your goal of ACCA membership. If you have any further queries regarding PER or ACCA membership please email members@accaglobal.com