

## Interpreting the Kaplan Dashboard

Version: 11 April 2019

Relevant Period: 1 January 2019 – 30 June 2019



In the period 1 January 2019 through 30 June 2019, InterPrac’s dashboard has been set-up to reflect a 35-point CPD target to be fulfilled in the FY18-19 year.

This target has been calculated:

$$\frac{30}{2} + 20 = 35 \text{ Points}$$

Pro-rated pre-FASEA points target (1/7/18-31/12/18) + FASEA points target (1/1/19-30/6/19)

TASA Points (20 pts) is an unchanged requirement of the Tax Practitioner’s Board

*Training Plan Period*

Jul 2018 Apr 2019 Jun 2019

Start End

FASEA Areas	Minimum Target Points	Completed Points	Over/Under Target Points	Available learning content	Expired/unsuccessful completion
Technical competence	2.5	22.5	20	103 item(s)	11 item(s)
Client care and practice	2.5	7.25	4.75	28 item(s)	1 item(s)
Regulatory compliance and consumer protection	2.5	12.5	10	49 item(s)	3 item(s)
Professionalism and ethics	4.5	3.75	0.75	15 item(s)	1 item(s)
General	8	1	7	7 item(s)	0 item(s)
<b>Total learning content</b>				<b>180 item(s)</b>	<b>140 item(s)</b>

This Display corresponds to the new FASEA CPD Areas (5 areas) ... ‘General’ representing a ‘catch all’ bucket for CPD that is assessed by InterPrac as eligible but does not correspond to the Other 4 CPD Areas.

In the period 1/1/2019 – 30/6/2019, **no meaning** can be attached to Minimum Target Points column nor Over/Under Target Points column.

These columns will be reconfigured and become meaningful post 30 June 2019.

The only useful column is the Completed Points which must ultimately equal or exceed 35 points by 30 June 2019.

**This is messy but we are unable to fully tailor or control the look and feel of the Dashboard page.**

Topic Areas	Minimum Target Points	Completed Points	Over/Under Target Points	Available learning content	Expired/unsuccessful completion
Responsible Manager (Generic Knowledge) *	0	0	0	0 item(s)	0 item(s)
Generic Knowledge	7	13.75	<b>6.75</b>	22 item(s)	44 item(s)
Financial Planning	2	4.25	<b>2.25</b>	10 item(s)	11 item(s)
Personal Taxation Issues (financial planning stream)	2	2.25	<b>0.25</b>	1 item(s)	3 item(s)
Securities	3	3	0	5 item(s)	20 item(s)
Derivatives	0	0	0	7 item(s)	3 item(s)
Managed Investments	3	3.75	<b>0.75</b>	25 item(s)	11 item(s)
Fixed Interest	1	1.25	<b>0.25</b>	9 item(s)	0 item(s)
Foreign Exchange	0	0	0	7 item(s)	2 item(s)
Superannuation	3	4	<b>1</b>	13 item(s)	7 item(s)
Self Managed Superannuation Funds	4	5.5	<b>1.5</b>	2 item(s)	5 item(s)
Retirement Income Streams	3	3.75	<b>0.75</b>	0 item(s)	3 item(s)
Social Security & Aged Care	2	0.75	<b>1.25</b>	3 item(s)	3 item(s)
Life Insurance	2	1	<b>1</b>	10 item(s)	8 item(s)
General Insurance	0	0	0	16 item(s)	5 item(s)
Estate Planning	1	1.3	<b>0.3</b>	2 item(s)	3 item(s)
Deposit Products and Non-cash Facilities	0	0	0	7 item(s)	1 item(s)
Credit & Mortgage Broking	0	0	0	0 item(s)	2 item(s)
Commercial Lending *	0	0	0	0 item(s)	0 item(s)
Other OTC Markets *	0	0	0	0 item(s)	0 item(s)
Practice Management	0	0.3	<b>0.3</b>	7 item(s)	5 item(s)
Personal Skills Development *	0	0	0	0 item(s)	0 item(s)
Skills	1	8	<b>7</b>	16 item(s)	0 item(s)
Ethics	1	3.5	<b>2.5</b>	15 item(s)	4 item(s)
Margin Lending and Geared Investments	0	0	0	3 item(s)	4 item(s)
TASA	20	35.1	<b>15.1</b>	177 item(s)	125 item(s)
<b>Total learning content</b>				<b>180 item(s)</b>	<b>140 item(s)</b>

\* Kaplan does not publish training material to this knowledge area.

This Display corresponds to the pre-FASEA RG 146 Knowledge Areas.

It is effectively superseded but Kaplan retains it

It carries **no meaning** for InterPrac advisers.

The only useful column is the Completed Points which must ultimately equal or exceed 35 points by 30 June 2019.

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