

End-Point Assessment

SEPA USER GUIDE

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Contents

Introduction	.3
Logging into SEPA	.3
Forgotten Password	3
Navigation Menu	4
My Profile	
Register Apprentices by Bulk Upload	8
Registering Apprentices Individually1	
View/Edit Apprentices1	4
Checklist and Documents1	5
Requesting EPA2	20
Bookings/Re-sits2	22
Withdrawing an Apprentice2	23
Employer Management2	
Training Provider Management2	27
Apprentice Status2	28
Contact Us2	29



Introduction

Smart End-Point Assessment (SEPA) is a platform that manages every aspect of end-point assessments (EPAs); from registering your apprentices, importing summative portfolios, recording evidence of the EPA, to viewing results and final grades.

Logging into SEPA

Go to the website - https://smartepa.co.uk

	Second Smart End Point Assessment	
1	Username	
^	Password 📀	
Forgo	of Password	
	Login	

Type your username and password into the login box and click Login.

Forgotten Password

If you are unsure of your password for SEPA, there is a forgotten password link on the SEPA homepage - <u>https://smartepa.co.uk</u>



Your username is usually your email address and once you have clicked the link an email should be sent through within an hour.



Navigation Menu

On the left side of the page is the Navigation Menu.

SETTING Sm MANAGEMENT	\odot	DASHBOARD
APPRENTICE MANAGEMENT	\odot	Welcome Back, Kristyberesfordtest
EMPLOYER MANAGEMENT	\odot	Dashboard
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To expand specific areas of the Navigation Menu, select the arrow to the right of the area you would like to view.

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APPRENTICE MANAGEMENT	\odot	Welcome Back, Kristyberesfordtest
EMPLOYER MANAGEMENT	\odot	Dashboard
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Add Apprentice View/Edit Apprentices	Personal Details EPA Details Other
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T TRAINING PROVIDER MANAGEMENT	Title Email
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	Family Name Mobile Number
	DOB Ethnic Origin III 0 year(s) old - Please Select
	Gender Please Select
	This field is required. Other (Gender)

The tabs across the top of the page show current and open pages.

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_	Given Name	Phone Number
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	Family Name	Mobile Number
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	DOB	Ethnic Origin
	U year(s) old	Please Select

You will be prompted to save edits before you leave the page.

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		×	
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ULN		7	
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Please Select	*		
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Jo			Ext. +1234
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Mandatory fields show a red line on the left side of the text box. They turn green when they have been completed correctly.

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	Please Select 🗸		
	This field is required.		



My Profile

If you need to change any of your personal details or reset your password, use the 'My Profile' tab available on any screen.

		Save	Change Profile Picture Reset Password
Title	Ms. v		Ç
Given Name	Kristy		
Family Name	Beresford		
Company Name	NCFE		
Job Title	Relationship Manager		
Email	Kristyberesford@ncfe.org.uk		
Phone Number	01912408967		
Mobile Number			
erred Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, London		



Register Apprentices by Bulk Upload

There are 2 ways to register apprentices on SEPA; individual registration or bulk upload, both options request the same information.

To bulk upload apprentice details, download the latest version of the 'Bulk Upload Apprentice Import Template' from the EPA Resource Library <u>here</u>.

Open the 'Bulk Upload Apprentice Import Template' spreadsheet and complete all mandatory fields.

Within the SEPA platform select 'Setting Management' then 'Import Data'.

SETTING Sm MANAGEMENT	\odot	DASHBOARD
Import Data		Welcome Back, Kristyberesfordtest
APPRENTICE Am MANAGEMENT	\odot	Dashboard
EMPLOYER MANAGEMENT	\odot	DASHBOARD
TRAINING PROVIDER MANAGEMENT	\odot	
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COMMUNICATION HISTORY	\odot	
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Select 'Browse File' and then select the completed bulk upload file from your computer.

SETTING SETTING MANAGEMENT	DASHBOARD	
Import Data	Welcome Back, Kristyberesfordtest	
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EMPLOYER MANAGEMENT 📀	IMPORT DATA	
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	Select an Import Template	Please Select
E _{Pa} EPA 📀	, ,	An Import Template must be specified
		The list of available import Template(s) you can select from, contains import Template(s) you have access to; this is based upon the relevant create permission(s) to all of the entity type(s) which would be imported.
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Select 'Import Apprentices' from the drop-down menu.

SETTING Sm MANAGEMENT	\odot	DASHBOARD	
Import Data		Welcome Back, Kristyberesfordtest	
APPRENTICE Am MANAGEMENT	\odot	Dashboard Import Data 💉 🗙	
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TRAINING PROVIDER MANAGEMENT	\odot	Select the Excel document (xls or xlsx) to import	Browse file
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Select 'Upload Data'



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T Pm	TRAINING PROVIDER MANAGEMENT	\odot		Browse file balk splead-apprentice-import template-v2Lates	
E Pa	EPA	\odot	Select an Import Template	Import Apprentices	~
Ch	COMMUNICATION HISTORY	\odot		The tist of available import Template(s) you can select from, contains import Template(s) you have access to; this is based upon the Import Template's creator and whether you have the relevant create permission(s) to all of the entity type(s) which would be imported.	
Re	REPORTING	\odot	Import Option(s)	+	

The system will now upload the apprentices and confirm when the apprentices are registered. Any apprentices that are not successfully registered will be highlighted in a pop-up box with details of the specific issues.

For more tips on how to use the bulk upload facility click on the 'troubleshooting' button on this page.



Registering Apprentices Individually

To register an individual apprentice, go to 'Apprentice Management' select 'Add Apprentice'.

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Personal Details Tab

On the 'Personal Details' tab complete the mandatory fields which are identified by the red bar on the left of each box.

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EMPLOYER MANAGEMENT	\odot	Personal Details EPA Details Other	
T TRAINING PROVIDER MANAGEMENT	\odot		
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		Family Name	Mobile Number
		DOB	Ethnic Origin
		U year(s) old	- Please Select 🗸
		Gender	
		- Please Select V	

Note: Please ensure you use a valid ULN for each apprentice as if entered incorrectly this can slow the certificate claims process.

EPA Details Tab

The 'EPA Details' tab is used to specify the details of the apprenticeship.

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View/Edit Apprentices	\odot	ADD APPRENTICE Personal Details EPA Details Other	Save Save and Close Cancel 🗙
T TRAINING PROVIDER MANAGEMENT		EMPLOYMENT / TRAINING DETAILS	
Pa EPA COMMUNICATION HISTORY	0	Employer - Please Select - This field is required. Employment Address	Training Provider/College NCFE Test Centre Training Address
Re REPORTING	\odot	- Please Select -	Ncfe, Q8, Newcastle upon Tyne, NE12 88T 🗸 🗸
		Certification Contact	Certification Address - Please Select
		STANDARD DETAILS	



Employer/Training Details

Employer

In this field you can either select an employer that you have previously added from the drop-down menu and then select the relevant address or add a new employer using green plus button (see Employer Management section for details on how to add an employer without adding an apprentice).

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EMPLOYER MANAGEMENT	\odot	ADD APPRENTICE Personal Details EPA Details Other	Save Save and Close Cancel X
T TRAINING PROVIDER MANAGEMENT	• 📀	Personal Details Ciritet	
Е ЕРА	\odot	EMPLOYMENT / TRAINING DETAILS Employer	Training Provider/College
Ch COMMUNICATION	\odot	Please Select This field is required.	NCFE Test Centre Training Address
RE REPORTING	\odot	Employment Address - Please Select	Ncfe, O6, Newcastle upon Tyme, NE12 88T 🗸 🗸
		Certification Contact	Certification Address
			Please Select 🗸

Training Provider/College

Select your company name from the 'Training Provider/College' field if it isn't pre-populated. The correct address should populate within the 'Training Address' field too.

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Re REPORTING	\odot	- Please Select - V	L Certification Address
		Centralión Conaci	Cetimication Address - Please Select -
		STANDARD DETAILS	

Standard Details

Select the relevant apprenticeship standard. The relevant assessment types and LARS code will populate automatically.

SETTING	\odot	Certification Contact Certification Address			
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APPRENTICE MANAGEMENT	\odot	STANDARD DETAILS			
Add Apprentice		Standard			
View/Edit Apprentices		- Please Select 🗸			
EMPLOYER EM MANAGEMENT	\odot	Please Select - Administration Business Administrator - Digital Delivery - Level 3 (195 - v1.00) Dental Veath			
T TRAINING PROVIDER Pm MANAGEMENT	\odot	Dential Nurse - Digital Delivery - Level 3 (61 - v1.00) Dental Nurse (Integrated) - Digital Delivery - Level 3 (61 - v1.20)			
E Pa EPA	\odot				
Ch HISTORY	\odot	Apprenticeship Length 0 Months 0 Days			
Re REPORTING	\odot	EPA DETAILS			
INCI OKTINO	0	Apprenticeship End Date (expected)			



EPA Details

SETTING Sm MANAGEMENT	\odot		Business Administrator - Digital Delivery - Level 3 (196 - v1.00)			
APPRENTICE MANAGEMENT	\odot		STANDARD INFORMATION			
	Ŭ		ASSESSMENT TYPES		LARS CODE	PUBLISHED DATE
Add Apprentice View/Edit Apprentices			INTERVIEW ONLINE ASSESSMENT PRESENTATION		196	25 September 2017
EMPLOYER MANAGEMENT	\odot	Г	Apprenticeship Length]	
T TRAINING PROVIDER Pm MANAGEMENT	\odot	E	12 Months 0 Days			
E Pa EPA	\odot		Apprenticeship Start Date	Apprenticeship End Date (expected) 28/09/2022		
Ch COMMUNICATION HISTORY	\odot		EPA Start Date (expected) 29/09/2022	Registration PO Number	-	
Re REPORTING	\odot		Degleterlee Junite Not yet specified EPA Invoice Not yet specified Line Manager Name	EPA PO Number		
				Assessor / Tutor Name		

Apprenticeship Length – this is to capture the length that the apprentice has been on programme and shouldn't include the time allocated for EPA. This will be reflective of the dates in the 'Apprenticeship Start Date' (start of on programme learning) and 'Apprenticeship End Date' (end of on-programme learning) fields.

EPA start date (expected) - This is the date that you would like the apprentice to go through Gateway. This date must be more than 90 days in the future. We require a minimum of 90 days' notice to ensure IEPA availability.

The 'Registration Invoice', 'EPA Invoice',' Registration PO Number', 'EPA PO Number', 'Apprentice Coordinator' boxes and 'Has EPA Membership?' tick box are all optional fields, however if you would like a PO Number to be assigned to appear on the invoice, please put the number in the EPA PO Number box before Requesting EPA.

Line Manager Contact Details

The contact is a free-type box so feel free to include an email address and contact number if applicable.

Sm	MANAGEMENT	\odot	STANDARD INFORMATION	
Am	APPRENTICE MANAGEMENT	\odot	ASSESSMENT TYPES	LARS CODE PUBLISHED DATE
	dd Apprentice		INTERVIEW ONLINE ASSESSMENT PRESENTATION	196 25 September 2017
	fiew/Edit Apprentices		Apprenticeship Length	
Em	EMPLOYER MANAGEMENT	\odot	12 Months 0 Days	
T	TRAINING PROVIDER MANAGEMENT	\odot	EPA DETAILS Apprenticeship Start Date	Apprenticeship End Date (expected)
			28/09/2021 III	28/09/2022 III
Pa	ЕРА	\odot	EPA Start Date (expected)	Registration PO Number
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Ch	HISTORY	\odot	Registration Invoice Not yet specified	EPA PO Number
	•	\sim	EPA Invoice Not yet specified Line Manager Name	٦ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ ـ
Re	REPORTING	\odot		Assessor / Tutor Name
			Apprentice Coordinator	Line Manager Contact
			Has EPA Membership?	r urwing type
				- Please Select V
				T READ GUILLE



Funding Type

Employer funded = levy.

Government funded = non-levy.

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Add Apprentice				
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T TRAINING PROVIDER MANAGEMENT	\odot	EPA DETAILS		
	~	Apprenticeship Start Date	Apprenticeship End Date (expected)	
E Pa EPA	\odot			
_		28/09/2021		
Ch COMMUNICATION	\odot	EPA Start Date (expected)	Registration PO Number	
		29/09/2022		
	\odot	Registration Invoice Not yet specified	EPA PO Number	
Re REPORTING	O	EPA Invoice Not yet specified		
		Line Manager Name	Assessor / Tutor Name	
		Apprentice Coordinator	Line Manager Contact	
		Has EPA Membership? 🗆	Funding Type	
			- Please Select	~
			Please Select	
		REASONABLE ADJUSTMENTS	Government Funded	
			Employer Funded	
		Are Reasonable Adjustments Required?		

Reasonable Adjustments

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SETTING

If the apprentice requires reasonable adjustments, tick the box next to 'Are Reasonable Adjustments Required?'

Sm MANAGEMENT	0		
APPRENTICE MANAGEMENT	\odot	Apprenticeship Length	
Add Apprentice		0 Months 0 Days	
View/Edit Apprentices		EPA DETAILS	
EMPLOYER MANAGEMENT	\odot	Apprenticeship Start Date	Apprenticeship End Date (expected)
in an other the		28/09/2021	28/09/2022
TRAINING PROVIDER MANAGEMENT	\odot	EPA Start Date (expected)	Registration PO Number
Pm MANAGEMENT		29/09/2022	
F	\odot	Registration Invoice Not yet specified	EPA PO Number
E Pa EPA	\odot	EPA Invoice Not yet specified	Please Select A
	_	Line Manager Name	Scribe or Speech Recognition Technology Assessor / Tutor N Computer Reader or Speech Recognition Technology Enabled
Ch COMMUNICATION	\odot		Bilingual Translation Dictionary (with extra time up to 10%) Transcriber
		Apprentice Coordinator	Modified Paper Request: Enlarged Paper Line Manager Con Modified Paper Request: Coloured Paper
Re REPORTING	\odot		Writing Software BSL Interpreter
		Has EPA Membership?	Rest Breaks
			Disea Octavity
			Extra Time: up to 100% Extra Time: up to 50%
		REASONABLE ADJUSTMENTS	Modified Language Paper Practical Assistant
			Reading Pen Technology
		Are Reasonable Adjustments Required	Braille Papers and/or Tactile Diagrams Extra Time: up to 25%
			Paper based MCQ assessment
		REASONABLE ADJUSTMENTS	- Please Select - ADD REASONABLE ADJUSTMENT •
		REASONABLE ADJUSTMENT NAME EPA PROVIDER COMMENTS STATUS	ACTIONS

Select the required reasonable adjustment from the drop-down menu, then click the green 'add reasonable adjustment' box. Click the green 'evidence' box to upload evidence file/s. Acceptable evidence is covered in the *EPA Reasonable Adjustments Policy* which can be found on the EPA Resource Library.

Once all mandatory fields are complete click 'Save'.

Apprentice details will now be either successfully saved or an error message will appear. If the error message is shown, please review the information entered, edit and try to click save again.



View/Edit Apprentices

Apprentices that have been registered on SEPA can be tracked and edited by navigating the 'View/Edit Apprentice' under 'Apprentice Management'.

SETTING MANAGEMENT	\odot	Dashboard Apprentices × ×	
APPRENTICE MANAGEMENT	\odot	FILTER	
Add Apprentice		HEIEK	
View/Edit Apprentices		Name	Name
EMPLOYER MANAGEMENT	\odot	Employer	- Please Select
T TRAINING PROVIDER Pm MANAGEMENT	\odot	Training Provider	× NCFE Test Centre
E Pa EPA	\odot	Matched Assessor	- Please Select -
	\odot	Standard	- Please Select -
		Apprentice Status	Please Select
Re REPORTING	\odot	PO No# or Invoice References	PO No#, Registration Involce Ref, Epa PO No#, Epa Involce Ref, Epa Resit PO No#
		Custom Field Value	Custom Field Value
		Expected EPA Start Date	Between and
		Show Inactive?	
			Search Q
		APPRENTICES	SEARCH. REFRESH
		ULN NAME EPA EXP GATEWAY START & ACCEPTANCE DATE DATE	NO. OF DAYS IN STATUS LAST IS OVERALL CERTIFIED PROGRESS ASSESSMENT UPDATED ACTIVE? ASSESSMENT ON DATE DATE GRADE

Find your apprentices using the filter at the top of the page or you can search for apprentices on the right by typing either their first or last name.

When you have apprentices that have completed their EPA, or if you have withdrawn an apprentice, they will go 'inactive'. If you need to find them for any reason you will need to make sure you tick 'Show Inactive' before you search.

To select an apprentice just click on their record and this will open in a new tab along the top.



Checklist and Documents

Once a newly registered apprentice has been saved, 3 new sub-tabs will appear – Documents, Checklist and Bookings/Re-sits. The apprentice's documents are uploaded to support the EPA request, the checklist must be completed before going through Gateway, and you can keep track of the bookings for assessment components in the final tab.

SETTING Sm MANAGEMENT	0	DASHBOARD Welcome Back, Kristyberesfordtest
Am MANAGEMENT Add Apprentice	\odot	Dashboard Apprentice 🖈 😰 Edit Apprentice 😁 💌
View/Edit Apprentices	_	EDIT APPRENTICE Apprentice Status - Assessment Pending Confirmation Save and Close Save and New Cancel X Deactivate Apprentice 📀 🧲
EMPLOYER MANAGEMENT	\odot	Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other Notes
T TRAINING PROVIDER MANAGEMENT	\odot	
Epa EPA	\odot	ULN Added On 15/08/2021 100049415
	~	Title Email
Ch HISTORY	\odot	Mr v leighenn eiliottgorde org uk
_	-	Given Name Phone Number
Re REPORTING	\odot	Craig Ed. +1234
		Family Name Mobile Number
		Miller fest 07711220800
		D08 Ethnic Origin
		29/01/1996 🎹 25 year(s) old - Please Select-
		Gender
		Male v

Checklist Tab

When looking to complete an apprentice's checklist you need to first navigate to the apprentice's record through 'View/Edit Apprentices' and once opened click on the 'Checklist' tab.

SETTING MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesfordtest	CLOSE ALL TABS
APPRENTICE MANAGEMENT	\odot	Dashboard Apprentices 🖈 😨 Edit Apprentice * 💽	
Add Apprentice View/Edit Apprentices		EDIT ADDENITICE Apprentice Status - Assessment	Save Save and Close Save and New Cancel X Deactivate Appientice O C
EMPLOYER MANAGEMENT	\odot	Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other	Notes
T TRAINING PROVIDER Pm MANAGEMENT	\odot	ULN	Added On 15/08/2021
E Pa EPA	\odot	100049415	Email
Ch COMMUNICATION HISTORY	\odot	Title Vite Vite Vite Vite Vite Vite Vite Vit	leighann.elliotl@ncfe.org.uk
	\odot	Given Name Craig	Phone Number Ext. +1234
Re REPORTING	\sim	Family Name	Mobile Number
		Miller test	07711220680
		DOB	Ethnic Origin
		29/01/1996 🇱 25 year(s) old	Please Select 🗸
		Gender	
		Male	



The page is split into 3 sections, 'items' (checklist), 'sign off" and 'details'.

IIE	M2	
	CHECKLIST	CHECKLIST DOCUMENT COUNT - 0
	QUESTION	ANSWER
	The training provider has signed the NCFE EPA Declaration Form following the tripartite meeting to agree apprentice readiness for EPA, and retains evidence of this	0
	The Apprentice has achieved their Level 2 in English	0
	The Apprentice has achieved their Level 2 in Mathematics	0
	The apprentice has created a work based project report - This must not be the project presentation	
	The apprentice has created a CPD Log	
	The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence	0
	The apprentice has completed the NCFE EPA evidence tracker	0
	The training provider has completed the EPA Booking request form	
	IN OFF Igned Off by Training Provider?	
S	igned Off by NCFE?	
	TAILS ompleted On	

The Items checklist must be completed first.

Checklist

TEMS	
CHECKLIST	CHECKLIST DOCUMENT COUNT - 0
QUESTION	ANSWER
The training provider has signed the NCFE EPA Declaration Form following the tripartite meeting to agree apprentice readiness for EPA, and retains evidence of this	
The Apprentice has achieved their Level 2 in English	
The Apprentice has achieved their Level 2 in Mathematics	
The apprentice has created a work based project report - This must not be the project presentation	
The apprentice has created a CPD Log	
The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence	
The apprentice has completed the NCFE EPA evidence tracker	0
The training provider has completed the EPA Booking request form	0



Checklist

On the items checklist you can see all the requirements for the apprentice's standard. There are 2 types of items on the checklist, some items only require a tick as confirmation, and some will require a piece of evidence to be uploaded. If a document is required when you tick the box, you will then be prompted to '**add document**' (evidence). You cannot sign off the checklist unless a document is uploaded in all required sections.

EMS							
CHECKLIST					CHECK	IST DOCUMENT COUNT - 0	
QUESTION	ANSWER						
The training provider has signed the NCFE EPA Declaration Form following the tripartite meeting to agree apprentice readiness for	or EPA, and retains	CHECKLIST E	/IDENCE			ADD DOCUMENT 📀	
evidence of this		DOCUMENT	TYPE	UPLOADED	DATE	ACTIONS	
		NAME		BY	UPLOADED		
	_						
The Apprentice has achieved their Level 2 in English							
The Apprentice has achieved their Level 2 in Mathematics							
The apprentice has created a work based project report - This must not be the project presentation							
The apprentice has created a CPD Log							
The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence							
The apprentice has completed the NCFE EPA evidence tracker							
The training provider has completed the EPA Booking request form							

To find the evidence select 'Browse File' and choose the correct document from your computer.

Once the Checklist has been completed and all relevant documents have been uploaded, go to the 'sign off' section at the bottom of the page and tick 'Signed off by the Employer' and 'Signed Off by Training Provider'.

NCFE will complete the 'Signed off by Assessor/Assessment Centre' and the 'Completed On' field once the Gateway checklist has been audited.

Select 'Save' to update the Apprentice record.

Dashboard	Apprent	tices 🖈 💌	Edit Apprentice	e 🖈 💌					_					
EDIT APPRENTICE		E	Apprentice Status - Gateway Unassigned				Save	Save and Close	Save and New	Cancel 🗙	Delete Apprentice 🛞	Deactivate Apprentice 🛞	C	
Personal I	Details	EPA Details	Documents	Checklist	Booking(s) / Resit(s)	Product(s)	Tracked Change	es Other	Notes					
Checklis	t													
ITEMS														
CHEC	KLIST											CHECK	LIST DOCUMENT COUNT - (o
QUEST	ION											ANSWER		
The training provider has signed the EPA Plus Declaration Form following the tripartite meeting to agree apprentice readiness for EPA, to						and retains evid	ence of this.							



Documents Tab

The documents tab is an area where additional documents can be uploaded for each apprentice that are still needed for the EPA but are not listed on the checklist.

Select the 'Documents' tab within 'View/Edit Apprentice'.

APPRENTICE	\sim	Welcome Back, Kristyberesfordtest	CLOSE ALL TABS M				
Am MANAGEMENT	\odot						
Add Apprentice		Dashboard Apprentices 🖈 💌 Edit Apprentice * 🗡 💌					
View/Edit Apprentices							
The the support the sub-		EDIT APPRENTICE Apprentice Status - Assessment Pending Confirmation	Save Save and Close Save and New Cancel 🗙 Deactivate Apprentice 🛛 🥩				
EMPLOYER MANAGEMENT	\odot						
		Personal Details EPA Details Documents Lin Checklist Booking(s) / Resit(s) Tracked Changes Other	Notes				
TRAINING PROVIDER MANAGEMENT	\odot						
	Ũ	ULN	Added On 15/08/2021				
E Pa EPA	\odot	1000049415					
Pa EPA	Ċ						
	\sim	Title	Email				
Ch HISTORY	\odot	Mr 🗸	leighann.elliott@ncfe.org.uk				
		Given Name	Phone Number				
Re REPORTING	\odot	Craig	Ext. +1234				
		Family Name	Mobile Number				
		Miller test	07711220680				
		DOB	Ethnic Origin				
		29/01/1996 🗰 25 year(s) old	Please Select 🗸 🗸				
		Gentler					

Select 'Add Document' and select the relevant file from your saved area.

Sm SETTING MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesfordtest		CLOSE ALL TABS
APPRENTICE MANAGEMENT	\odot			
Add Apprentice View/Edit Apprentices		Dashboard Apprentices 🖈 🗴 Edit Apprentice * 🖈 🖈		
EMPLOYER Em MANAGEMENT	\odot	EDIT APPRENTICE Apprentice Status - Assessment Pending Confirmation	Save Save and Close Save and New Cancel X Deac	ctivate Apprentice 🛞 🛛 🗯
		Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other Notes		
T TRAINING PROVIDER Pm MANAGEMENT	\odot		-	
E Pa EPA	\odot	Documents for Craig Miller test		+ ADD DOCUMENT
COMMUNICATION HISTORY	\odot	This area provides a location for you to upload documents or evidence for your Apprentice. Any changes made in this	; area are automatically saved.	
		Document name Evidence de	etails Uploaded	

You can indicate which assessment type the evidence is relating to by clicking 'mark as evidence' and selecting from the drop-down box.

SETTING MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesfordtes	t						CLOSE ALL TABS
APPRENTICE MANAGEMENT Add Apprentice	\odot	Dashboard Apprentices 🖈 💌	Edit Apprentice * X ×						
View/Edit Apprentices	-	EDIT APPRENTICE	Apprentice Status - Ass Pending Confirmation	essment			Save Save and Close	Save and New Cancel X	Deactivate Apprentice 🛞 💋
Em MANAGEMENT	\odot	Personal Details EPA Details	Documents Checklist	Booking(s) / Resit(s)	Tracked Changes	Other Notes			
TRAINING PROVID Pm MANAGEMENT	^R 📀								
Ера ЕРА	\odot	Documents for Craig Miller test + ADD DOCUMENT							
	\odot	This area provides a location for you to upload documents or evidence for your Apprentice. Any changes made in this area are automatically saved.							
		Document name				Evidence details		Uploaded	
REPORTING	\odot	Craig Miller test.docx						7 days ago	:



You can view more options for the document once it has been uploaded by using the 3 dots.

SETTING MANAGEMENT APPRENTICE MANAGEMENT	⊙ ⊘	DASHBOARD Welcome Back, Kristyberesfordtest	CLOSE ALL TABS 🗃	
Add Apprentice View/Edit Apprentices		Dashboard Apprentices 🖈 🔊 Edit Apprentice *		
EMPLOYER MANAGEMENT	\odot	EDIT APPRENTICE Pending Confirmation Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other Notes	Save Save and Close Save and New Cancel X Deactivate Apprentice O C	_
	\odot			
Ера ЕРА	\odot	Documents for Craig Miller test This area provides a location for you to upload documents or evidence for your Apprentice. Any changes made in this area are automatic	+ ADD DOCUMENT tically saved.	
Ch COMMUNICATION HISTORY	\odot	Document name Evidence details	Uploaded	
Re REPORTING	\odot	Craig Miller test.docx MARK AS EVIDENCE	7 da 🔥 Change file 🗄	
			Preview	
			View full details	
			- Cult dy	

Once all files are uploaded, select 'Save'.



Click 'Get Apprentice(s)'.

Requesting EPA

You need to request EPA for each apprentice after uploading the relevant documents onto the Checklist and Documents tab by clicking the Request EPA button on the apprentice record.

EDIT APPRENTICE Apprentice Status - Gateway Unassigned Save and Close Save and New Cancel Deactivate Apprentice Request EPA Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Product(s) Tracked Changes Other Notes	Dashboard	Appr	rentices 🖈 🗴	Edit Apprentice	e 🛪 💌											
Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Product(s) Tracked Changes Other Notes	EDIT AP	PRENTI	CE			way				Save Sa	ave and Close	Save and New	Cancel 🗙	Deactivate Apprentice 🛞	Request EPA	S
	Persona	I Details	EPA Details	Documents	Checklist	Booking(s) / Resit(s)	Product(s)	Tracked Changes	Other	Notes					U	

If the information isn't already prepopulated in the boxes on the next screen, you must select them to match what is on the apprentice record already, starting with either Face to Face or Digital assessment methods, followed by either 'Apprentices Training Provider' or 'Apprentice's Workplace' for the EPA location and the associated address

Dashboard Apprentices ★ ★ Edit /	Apprentice 🗡 🐑 Request EPA 🖉 🗶	
REQUEST EPA		Close S
Standard	Professional Accounting Taxation Technician - Level 4 (117 - v1.00)	v
Standard Pathway	Tax	~
EPA Location	Apprentice's Training Provider	~
Training Provider	Kristy's test provider	~
Training Provider Address	Ncfe, Q6, Newcastle upon Tyne, NE12 8BT	~
SELECT APPRENTICE(S)	Please Select	Reset ♂ Get Apprentice(s) Q Get Apprentice(s) Q Add Apprentice(s) Q

If you receive a message advising no apprentices have been found, check the search criteria to confirm it matches the apprentice record and search again.

If apprentices are available that match the search criteria, a blue banner will appear saying 'Apprentice list updated'. Click on 'Please Select' then on the apprentice's name, finally clicking 'Add apprentice'. More than one apprentice can be requested by following the same process.

Dashboard Apprentices 🖈 💌 Edi	tApprentice 🗶 🖈 Request EPA 🖉 💌							
REQUEST EPA		Close 😂						
Standard	Standard Professional Accounting Taxation Technician - Level 4 (117 - v1.00)							
Standard Pathway	Standard Pathway Tax							
EPA Location	EPA Location Apprentice's Training Provider							
Training Provider	Kristy's test provider	~						
Training Provider Address	Ncfe, Q8, Newcastle upon Tyne, NE12 8BT	~						
		Reset C Get Apprentice(s) Q						
SELECT APPRENTICE(S)	- Please Select	Add Apprentice(s) •						
APPRENTICE NAME	Ben stobbs	ACTIONS						



Select 'Match Assessor'.

Dashboard Apprentices 🖈 🗵 Edit	Apprentice 🖈 💌 Request EPA	* X		
REQUEST EPA				Close O
Standard	Professional Accounting Taxation Tech	nician - Level 4 (117 - v1.00)		~
Standard Pathway	~			
EPA Location	~			
Training Provider	~			
Training Provider Address	~			
				Reset 🗘 Get Apprentice(s) Q
SELECT APPRENTICE(S)	Please Select			Add Apprentice(s) 🗢
APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
Ben stobbs (2020202020)	NCFE	Kristy's test provider	18/11/2021	Remove 🛞
				Match Assessor(s) Q

When all apprentices have been matched with an assessor a message within a green banner will appear saying "We have successfully allocated assessor(s) to your apprentice(s)".

The 'Request EPA' process is now complete.



Bookings/Re-sits

When you want to view assessment bookings you will need to first navigate to the apprentices record through 'View/Edit Apprentices' and once opened click on the 'Bookings/Re-sits' tab.

SETTING Sm MANAGEMENT	\odot	DASHBOARD					CLOSE ALL TABS
APPRENTICE MANAGEMENT	\odot	Welcome Back, Kristyberesfordtest					CLOSE ALL TABS
Add Apprentice View/Edit Apprentices		Dashboard Apprentices X 🖈 Edit Apprenti	e Status - Booked				
Em EMPLOYER MANAGEMENT	\odot	EDIT APPRENTICE Apprentite Personal Details EPA Details Documents		I Changes Other Notes	Save Save and Close Save	and New Cancel	Ceactivate Apprentice
T TRAINING PROVIDE MANAGEMENT	^R ⊙			Changes Outer Notes			
EPA EPA	\odot	BOOKING(S) / RESIT(S)					
		ASSESSMENT TYPE	SCHEDULED FOR	STATUS MODERATION STATUS	ASSESSOR / ASSESSMENT CENTRE	PO NO #	INVOICE NO # ACTIONS
Ch HISTORY	\odot	Competence Interview informed by Portfolio	Day 1 - 20/10/2021 11:15 until 20/10/2021 12:10	Confirmed	Carl Wilson	N/A I	4/A
	\odot	Observation of Practice	Day 1 - 20/10/2021 09:30 until 20/10/2021 10:50	Confirmed	Carl Wilson	N/A I	I/A
		Overall Grade - Please Select -					

On this page you can see the 'assessment type' and the 'date/time' each component has been booked for.

SETTING Sm MANAGEMENT	\odot	DASHBOARD Welcome Back, Klistyberesfordtest	CLOSE ALL TABS								
APPRENTICE MANAGEMENT	\odot	abboard Apprentices 🖈 🖬 Edit Apprentice 💽									
Add Apprentice View/Edit Apprentices		EDIT APPRENTICE Apprentice Status - Booked	Save Save and Close Save and New Cancel X Deactivate Apprentice O 3								
EMPLOYER MANAGEMENT	\odot	Personal Details EPA Details Documents Checklist Booking(s) / Rest(s) Tracked Changes Other Notes									
T TRAINING PROVIDE MANAGEMENT	° 📀										
E Pa EPA	\odot	BOOKING(\$) / RESIT(\$) ASSESSMENT TYPE SCHEDULED FOR STATUS MODERATION STATUS	ASSESSOR / ASSESSMENT CENTRE PO NO # INVOICE NO # ACTIONS								
Ch COMMUNICATION	\odot	Competence Interview informed by Portfolio Day 1 - 20102021 11:15 until 20102021 12:10 Contempt	Carl Wilson N/A N/A								
	\odot	Observation of Practice Day 1 - 20/10/20/21 09:30 until 20/10/20/21 10:50 Continued	Carl Wilson N/A N/A								
		Overall Grade									
		- Please Select - 🗸 🗸									

If you have any queries with the bookings, please contact the IEPA assigned for that apprentice.

Accessing Apprentice Results

When you want to view assessment results you will need to first navigate to the apprentice's record through 'View/Edit Apprentices' and once opened click on the 'Bookings/Re-sits' tab. Please bear in mind that when you have apprentices that have completed their EPA, or if you have withdrawn an apprentice, they will go 'inactive'. If you need to find them, you will need to make sure you tick 'Show Inactive' before you search.

Click the 'info' button to the right-hand side of the relevant assessment method to view the grade and any additional details about the assessment. The results are issued 5 working days after the assessment takes place.

Sm MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesfordtest							OSE ALL TABS
APPRENTICE Am MANAGEMENT	\odot	welcome back, mistyberestoratest							Doc nee (noo
Add Apprentice		Dashboard Apprentices 🖈 🛪 Edit Apprentic							
View/Edit Apprentices		EDIT APPRENTICE Apprentic	e Status - Complete	Save Sav	ve and Close Save and New	Cancel X Activate Apprentice Θ	Request EPA	View EPA Results S	Results Summary
EMPLOYER MANAGEMENT	\odot	Personal Details EPA Details Documents	Checklist Booking(s) / Resit(s) Tracked Cha	anges Other	Notes				
TRAINING PROVIDER MANAGEMENT	0		Circolary Doolarg(3)/ reall(3)	anges onner	indus.				
ера	\odot	BOOKING(S) / RESIT(S)							
		ASSESSMENT TYPE	SCHEDULED FOR	STATUS	MODERATION STATUS	ASSESSOR / ASSESSMENT CENTRE	PO NO #	INVOICE NO #	ACTIONS
h HISTORY	\odot	Practical Observation with Q&A	Day 1 - 11/12/2020 09:30 until 11/12/2020 10:24	Completed		Keith Jenner	N/A	N/A	Info
REPORTING	\odot	Professional Discussion with Portfolio of Evidence	Day 1 - 02/12/2020 09:30 until 02/12/2020 10:24	Completed		Keith Jenner	N/A	N/A	View Comple Info
		Work-based Project Supported by Interview	Day 1 - 14/01/2021 10:00 until 14/01/2021 10:54	Completed		Keith Jenner	N/A	N/A	Info
		Overall Grade			Date Cert Awarded				
		Pass C Recalculate			19/01/2021 00:00:00				



Withdrawing an Apprentice

If an apprentice has left the standard and no longer needs to be registered on SEPA, you can withdraw them following the below steps. Go to 'View/Edit Apprentice' under 'Apprentice Management'.

Find your apprentice/s using the filter at the top of the page or search on the right by typing either their first or last name. Click on their record to open in a new tab.

Click on the 'EPA Details' tab and scroll down to the 'status history' section near the bottom of the page. Click the 'please select' box and chose the relevant status. Click 'change status'.

	Has EPA Membership?	Is EPA Membershin?							
	nuo Erremoniorionip. C		_						
	STATUS HISTORY			Please Select V	CHANGE STATUS 📀				
	STATUS	DATE CHANGED		Pending Functional Skills Sickness	NOTES				
	New	21/09/2021 12:09		Maternity Leave Sabbatical Paternity Leave Withdrawn	Automatically set by the system				
				On Hold					
RI	EASONABLE ADJUSTMEN	TS							
	Are Reasonable Adjustments Require	12 🗆							

The status will now appear in the 'status history' box with a date stamp and you can add any relevant notes.

Scroll to the top of the page and click 'save'.

The status will change to withdrawn. The final step is to deactivate the apprentice using the 'Deactivate Apprentice' button.

SETTING Sm MANAGEMENT	\odot	DASHBOARD Welcome Back. Kristyberesfordtest
APPRENTICE MANAGEMENT	\odot	
Add Apprentice		Dashboard Apprentices 🖈 🐑 Edit Apprentice 🔹
View/Edit Apprentices		EDIT APPRENTICE Apprentice Status - Failed ULN Check Save Save and Close Save and New Cancel X Deactivate Apprentice C
EMPLOYER Em MANAGEMENT	\odot	Personal Details EPA Details Documents Checklist Booking(s) / Restl(s) Tracked Changes Other Notes
T TRAINING PROVIDER MANAGEMENT	\odot	
E Pa EPA	\odot	ULN Added On 25/08/2021 100354117
		Title Email
Ch HISTORY	\odot	Miss v leghannellot@nde org uk
	~	Given Name Phone Number
REPORTING	\odot	Craig BA Ett. +1234
		Family Name Mobile Number
		Miler 07711220680
		DOB Ethnic Origin
		01/05/2000 🗰 21 year(s) old Please Select 🗸
		Gender
		Female v
		Other (Gender)

A message will appear asking if you are sure you want to deactivate the apprentice , click 'OK' on this box.

A bar will appear across the top advising the state has been updated. Click 'save and close'.

The apprentice list will now update, the apprentice will not appear unless the 'show inactive' box is ticked.



Employer Management

This section is for recording the details of an apprentice's employer. To add a new employer select 'Employer Management' from the Navigation Menu.

Add Employer

Select 'Add employer'. Create an employer by entering their company information.

Sm SETTING MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesfo	ordtest							CLOSE ALL TABS 🏛
APPRENTICE Am MANAGEMENT	⊘ ⊘	Dashboard Add Employer >								
Em EMPLOYER MANAGEMENT Add Employer Lus View/Edit En7/Jolyers	0	ADD EMPLOYER								Save Save and Close Save and New Cancel 🛠
T TRAINING PROVIDER MANAGEMENT	\odot	Details Users/Contacts	Additional De	tails						
Ера ЕРА	\odot	Employer ID					ESFA Funded?		Not Set	~
Ch COMMUNICATION HISTORY	\odot	Contract Required?		Unknown			~			
RE REPORTING	\odot	Contract								
		ADDRESSES								ADD ADDRESS 🗢
		PRIMARY TY	YPE	ADDRESS LINE 1	ADDRESS	S LINE 2	TOWN	COUNTY	POSTCODE	ACTIONS

Employer ID

The Employer ID is the employer identification code. We recommend using their Company's house number as best practice, but it can be any combination of letters or numbers which will allow you to identify the employer in future.

ESFA Funded?

Choose which funding option is applicable for the employer. The options are either 'TRUE' (non-levy) or 'FALSE' (levy).

STING MAADURT	⊚	DASHBOARD	10						0.000 AL THE #
		Danitional Add Emp	iyer × 🖬						
	0 0	ADD EMPLOYER						204 204	and Cone Save and Now Cancel M
And Depinger Yourt of Construction	Ĭ		ACIA ABDIA	Na Deale Citier					
	⊚	Rame Employer 10				ESPA#undedP		NEM D	
K 104	۲	Contract Required?		- introen -				Not fait True Faite	
DA CONSUMPTION SECOND	⊚	Cartrait							
R. 100.400	Θ	ADORESSES							ACC ACCHILISS O
		PROMY	TYPE	ADDRESS UNE 1	ACCREDIT LANE 2	1045	CIDUATY	POSTDODE	ACTIONS



Contract Required?

Ensure the 'Contract required?' field is set to 'No'.

_	0 0	DASHBOARD Welcome Back, Kristyber Dashboard Add Employ							CLOSE ALL TABS
Add Employer	⊘	ADD EMPLOYER						I	Save Save and Close Save and New Cancel X
View/Edit Employers	\odot	Details Users/Contact	ts Additional	Details					
E EPA	\odot	Employer ID				ESFA Funded?		Not Set	*
Ch COMMUNICATION HISTORY	\odot	Contract Required?		No		~		•	
Re REPORTING	\odot	Contract							
		ADDRESSES							ADD ADDRESS •
		PRIMARY	TYPE	ADDRESS LINE 1	ADDRESS LINE 2	TOWN	COUNTY	POSTCODE	ACTIONS

Employer Addresses

Select 'Add address' and complete the address for the employer using their Head Office address.

SETTING Sm MANAGEMENT	\odot	DASHBOARD Welcome Back, Kristyberesford					CLOSE ALL TABS
AM APPRENTICE MANAGEMENT	\odot						
Em EMPLOYER MANAGEMENT	\odot						Save Save and Close Save and New Cancel X
Add Employer View/Edit Employers		ADD EMPLOYER					save save and close save and new Cancer
T TRAINING PROVIDER MANAGEMENT	\odot	Details Users/Contacts	Additional Details				
Ера ЕРА	\odot	Name					
		Employer ID			ESFA Funded?	Not Set	~
Ch HISTORY	\odot	Contract Required?	No		~		
	\odot	Contract					
		ADDRESSES					
		PRIMARY TYPE	E ADDRESS LINE 1	ADDRESS LINE 2	TOWN	COUNTY POSTCODE	ACTIONS

Select 'TYPE' using the drop-down options, usually this is 'Business'; however, if there are apprentices based in multiple branches you can add multiple addresses as additional branch addresses using the process below, selecting 'Branch' for each additional address.

SETTING Sm MANAGEMENT	\odot	DASHBOARD							CLOSE ALL TAIS 🕅				
APPRENTICE MANAGEMENT	\odot	Dashboard Add Employer *	Welcome Back, Kristyberesfordtest										
EMPLOYER MANAGEMENT	\odot												
Add Employer		ADD EMPLOYER					Save Save and Close Save and New Cancel X						
View/Edit Employers		Details Users/Contacts Additio	nal Details										
TRAINING PROVIDER MANAGEMENT	\odot	Name	_										
	\odot												
Pa EPA	\odot	Employer ID				ESFA Funded?		Not Set	~				
	\odot	Contract Required?	No			•		•					
RE REPORTING	\odot	Contract											
		ADDRESSES							ADD ADDRESS O				
		PRIMARY TYPE	A	DDRESS LINE 1	ADDRESS LINE 2	TOWN	COUNTY	POSTCODE	ACTIONS				
		Please Solid: Please Solid:	2						۹ 🖊 🧕				
		Home Business Branch Office											

You can use the magnifying glass to search for the employer's address using their postcode. Alternatively, use the pencil icon to enter the address manually.

Please note – the apprenticeship certificate will be sent by the ESFA to the employer's main address (as listed in this field).



View/Edit Employers

To edit an existing employer select 'Employer Management' from the Navigation Menu then 'View/Edit Employers'.

Sm SETTING MANAGEMENT		DASHBOARD Welcome Back, Kristyberesfordtest			CLOSE ALL TABS 🏛
AMPRENTICE MANAGEMENT	0	Dashboard Employers			
Em EMPLOYER MANAGEMENT					
Add Employer		FILTER			
View/Edit Employers		Show Inactive?	0		
T TRAINING PROVIDER Pm MANAGEMENT	0				Search Q
Ба EPA	0	EMPLOYERS		SEARCH.	REFRESH
Ch COMMUNICATION C	0	COMPANY NAME	EMPLOYER ID	\$	IS ACTIVE? 👙

Click on the employer that you would like to make the amendment to and then from here you can add/remove/addresses or contacts.

Users/Contacts Tab

Complete the details for the named employer contact responsible for the apprentice. There are various contacts this could be, employers will have different arrangements depending on their set up.

Fill in all mandatory fields then Click 'Save'. The Employer is now set up and stored within SEPA and will be able to be selected for future apprentices.



Training Provider Management

Adding Contacts

Please bear in mind when creating a contact against a Training Provider, the person will be sent any system generated emails regarding the apprentices.

If you would like another person to be a user on SEPA who is able to manage apprentices and access the separate EPA Resource Library, please contact eparelationshipteam@ncfe.org.uk

Sm	SETTING MANAGEMENT	\odot	DASHBOARD	
Am	APPRENTICE MANAGEMENT	\odot	Welcome Back, Kristyberesfordtest	
Em	EMPLOYER MANAGEMENT	\odot	Dashboard	_
T Pm	TRAINING PROVIDER MANAGEMENT	\odot	DASHBOARD - Please Select - Add Widget C	
	Add Training Provider/Colleg			
E Pa	EPA 🗸	\odot		
Ch	COMMUNICATION HISTORY	\odot		
Re	REPORTING	\odot		

Click 'Users/Contacts' and then 'add contact'. Fill in relevant details for the new contact. Click 'Save'

SETTING MANAGEMENT	 ⊘ 	DASHBOARD Welcome Back, Kristyberes	sfordtest						CLOSE ALL TABS
Am MANAGEMENT	0	Dashboard Edit Training P	Dashboard Edit Training Providen/College / 💌						
Em MANAGEMENT T TRAINING PROVIDER MANAGEMENT	⊘ ⊘	EDIT TRAINING PROVI	EDIT TRAINING PROVIDER/COLLEGE Save and Close Save and New Cancel X						Save Save and Close Save and New Cancel X
Add Training Provider/Colleg	je	Details Users/Contacts							
View/Edit Training Provider/	College								
E Pa EPA	\odot	CONTACTS							
	\odot	NAME	JOB TITLE	EMAIL		LANDLINE	MOBILE	OTHER	ACTIONS
Ch HISTORY		Craig Miller	CRE	craigmiller@ncfe.org.uk (preferred)					
Re REPORTING	\odot								



Apprentice Status

You will notice the apprentice's status change throughout their journey, here is an explanation of what each of the statuses mean.

Status	Description					
New	Apprentice has been created and no EPA progress has been made.					
Gateway Unassigned	Progress has been made on the apprentice's checklist, but Gateway has not yet been requested.					
Gateway Assigned – Awaiting Confirmation	An EPA has been requested and our Audit Team are completing the Gateway audit.					
Gateway Assigned	The apprentice has been accepted through Gateway.					
Assessment Pending Confirmation	One or more assessments are provisionally booked and awaiting confirmation.					
Booked	All assessments have been confirmed.					
Pending Results	All assessments have taken place, but results have not been confirmed.					
Complete	All results have been completed and sent to all listed parties.					

As well as these, you can also request the below statuses:

- In Dispute
- Paternity Leave
- Maternity Leave
- Withdrawn
- Sabbatical
- Sickness
- On Hold.



Contact Us NCFE Q6 Quorum Park Benton Lane Newcastle upon Tyne NE12 8BT

Tel: 0191 240 8950* Email: eparelationshipteam@ncfe.org.uk Website: <u>https://www.ncfe.org.uk/end-point-assessment</u>

*To continue to improve our levels of customer service, telephone calls may be recorded.



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