

End-Point Assessment

SEPA USER GUIDE

Contents

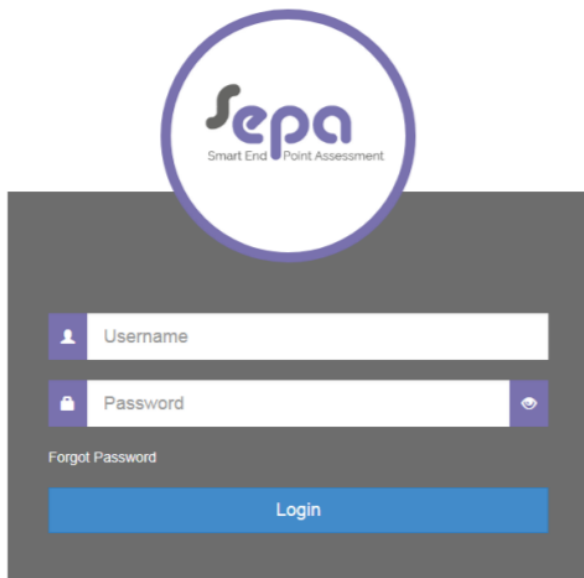
Introduction	3
Logging into SEPA.....	3
Forgotten Password.....	3
Navigation Menu	4
My Profile	7
Register Apprentices by Bulk Upload	8
Registering Apprentices Individually	10
View/Edit Apprentices	14
Checklist and Documents	15
Requesting EPA.....	20
Bookings/Re-sits	22
Withdrawing an Apprentice	23
Employer Management.....	24
Training Provider Management.....	27
Apprentice Status.....	28
Contact Us.....	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

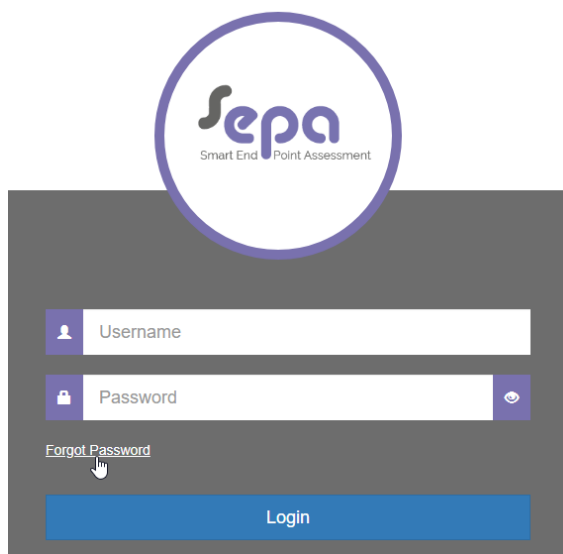
Go to the website - <https://smartepa.co.uk>



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

Forgotten Password

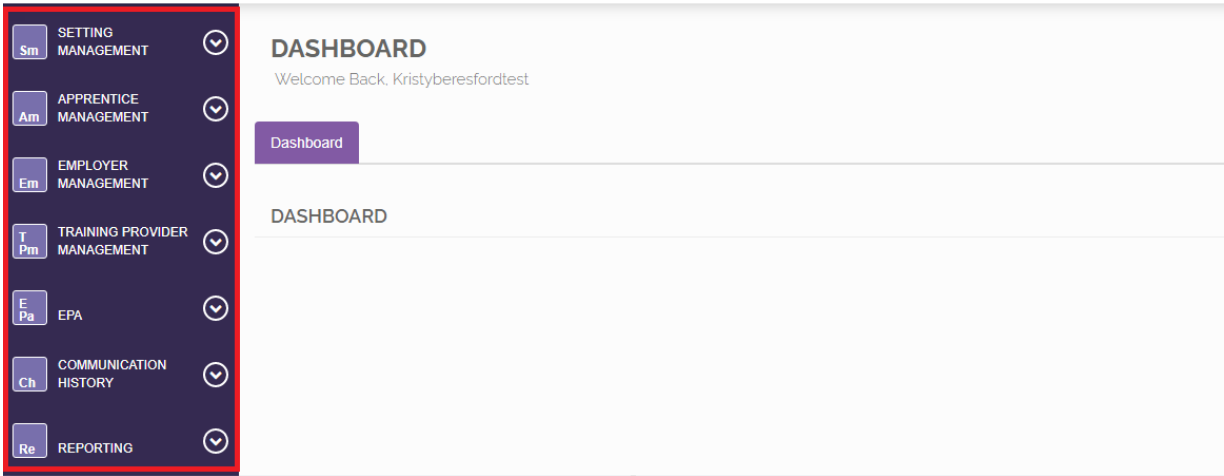
If you are unsure of your password for SEPA, there is a forgotten password link on the SEPA homepage - <https://smartepa.co.uk>



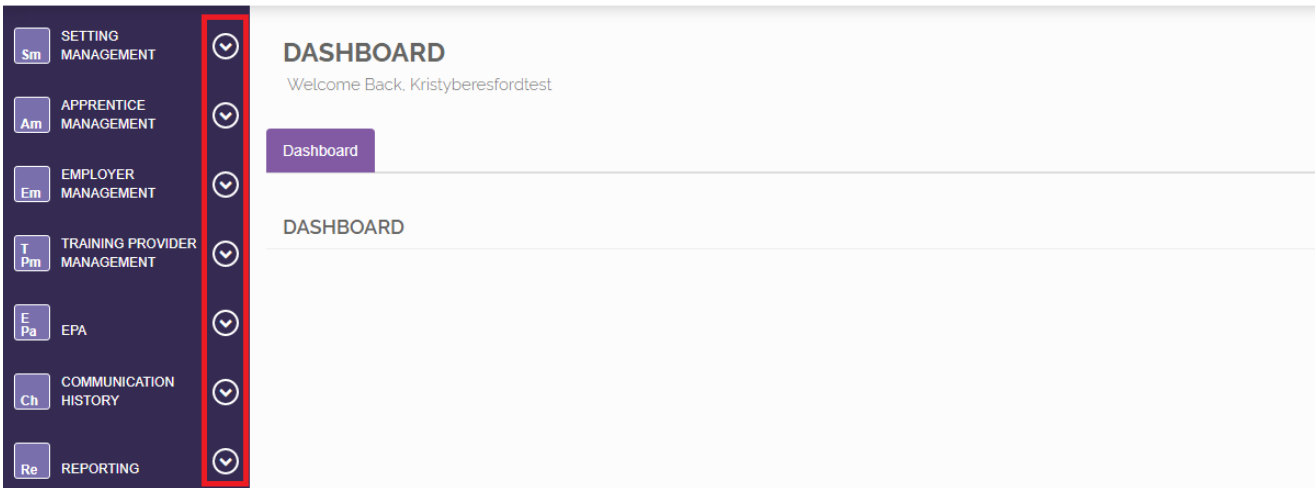
Your username is usually your email address and once you have clicked the link an email should be sent through within an hour.

Navigation Menu

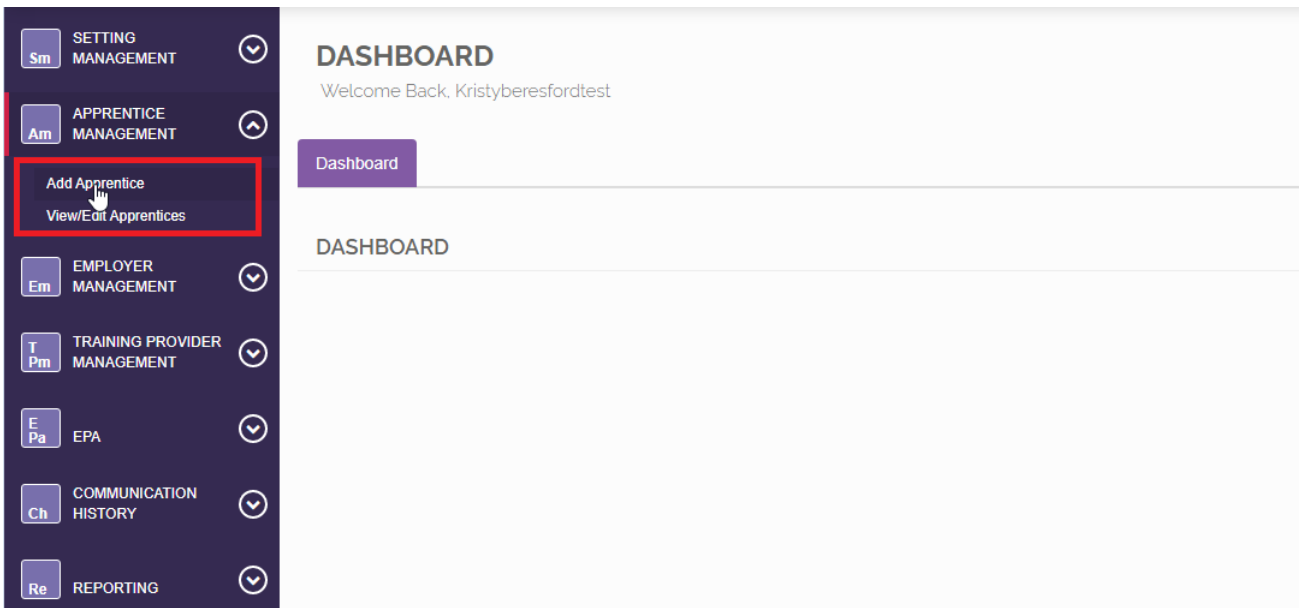
On the left side of the page is the Navigation Menu.



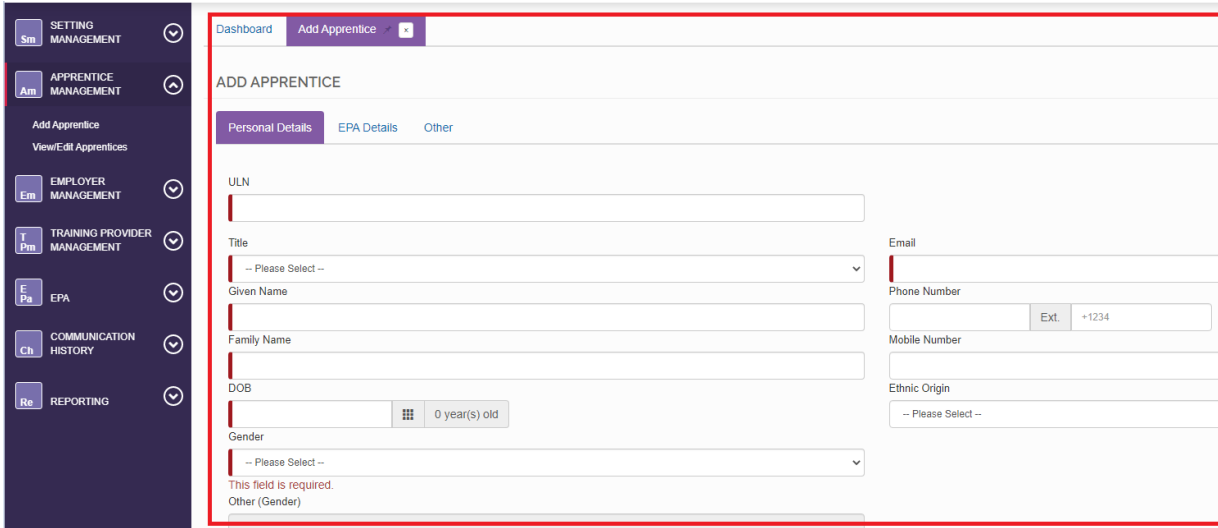
To expand specific areas of the Navigation Menu, select the arrow to the right of the area you would like to view.



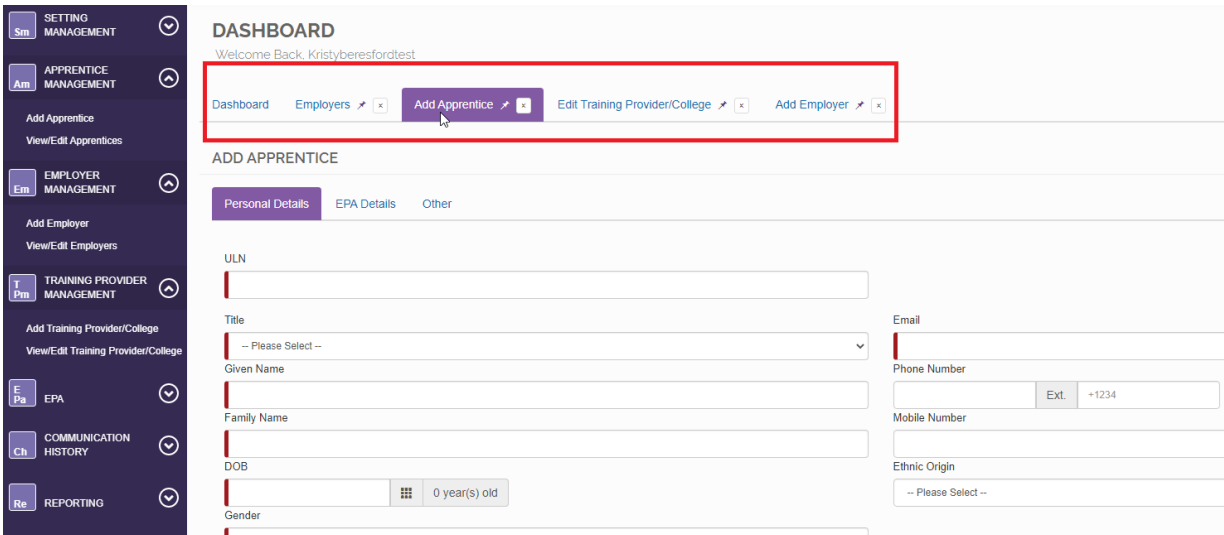
On the expanded area click the relevant text to open a sub-area.



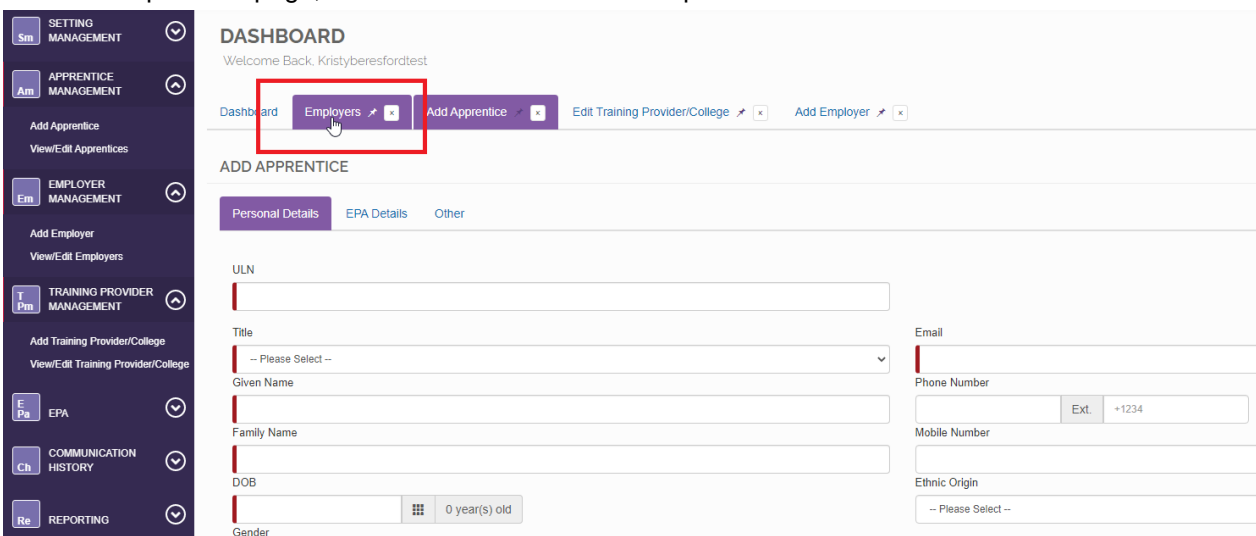
The sub-area displays a page in the main part of the window.



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



To view the previous page, click the relevant tab on the top row.



An asterisk on the tab shows a page has been edited but not saved. Edits must be saved before navigating away.

The screenshot shows the 'ADD APPRENTICE' form in a web application. The left sidebar contains navigation menus for 'SETTING MANAGEMENT', 'APPRENTICE MANAGEMENT', 'EMPLOYER MANAGEMENT', 'TRAINING PROVIDER MANAGEMENT', 'EPA', 'COMMUNICATION HISTORY', and 'REPORTING'. The main content area is titled 'DASHBOARD' and 'ADD APPRENTICE'. The 'Add Apprentices' tab is highlighted with a red asterisk. The form fields include: ULN, Title (dropdown), Given Name (Jo), Family Name (Bloggs), DOB (0 year(s) old), Email, Phone Number (+1234), Mobile Number, and Ethnic Origin (dropdown). A red vertical line is visible on the left side of the ULN field.

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

This screenshot shows the same 'ADD APPRENTICE' form as above, but with a confirmation dialog box overlaid. The dialog box is titled 'ARE YOU SURE?' and contains the text: 'If you choose to Cancel, this record will not be saved. Are you sure you wish to cancel?'. There are 'Cancel' and 'Ok' buttons at the bottom of the dialog. The 'Ok' button is highlighted with a red box. The 'Add Apprentices' tab in the background still has a red asterisk.

Mandatory fields show a red line on the left side of the text box. They turn green when they have been completed correctly.

This screenshot shows the 'ADD APPRENTICE' form with a focus on mandatory fields. A red vertical line is present on the left side of the ULN, Title, and Gender dropdown menus. A green vertical line is present on the left side of the Given Name and Family Name text boxes. A red box highlights the ULN, Title, and Gender fields. At the bottom of the form, there is a message: 'This field is required. Other (Gender)'. The 'Add Apprentices' tab still has a red asterisk.

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.

Kristyberesfordtest

Save Change Profile Picture Reset Password Back to Dashboard

Title Ms

Given Name Kristy

Family Name Beresford

Company Name NCFE

Job Title Relationship Manager

Email Kristyberesford@ncfe.org.uk

Phone Number 01912408967

Mobile Number

Preferred Time Zone (UTC+00:00) Dublin, Edinburgh, Lisbon, London

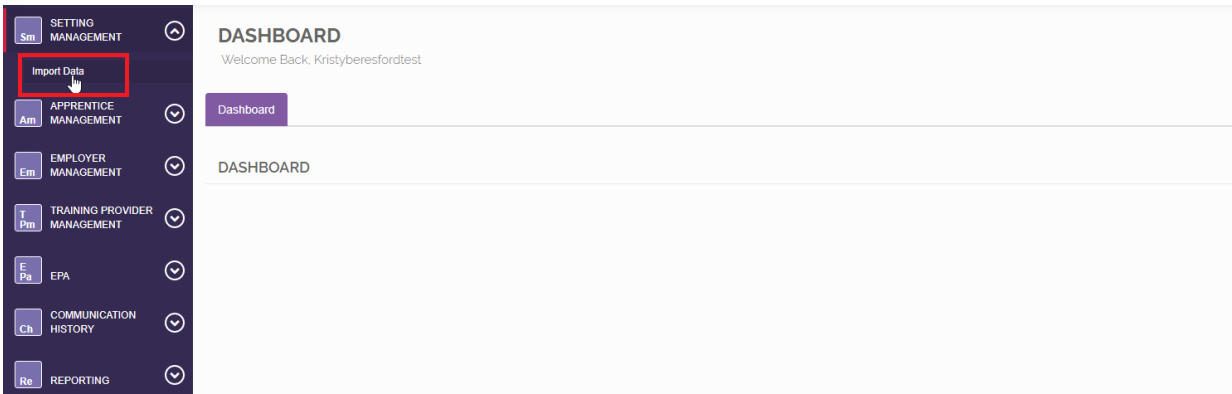
Register Apprentices by Bulk Upload

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

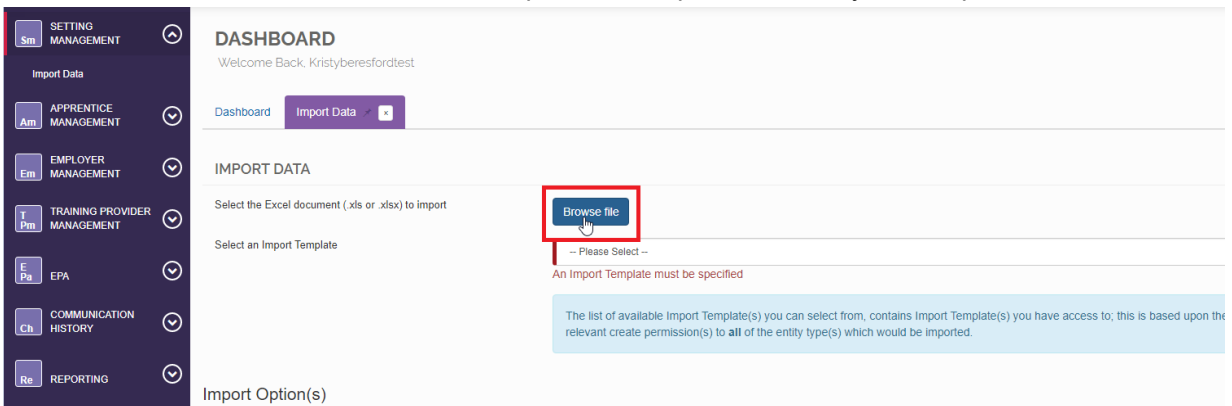
To bulk upload apprentice details, download the latest version of the 'Bulk Upload Apprentice Import Template' from the EPA Resource Library [here](#).

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

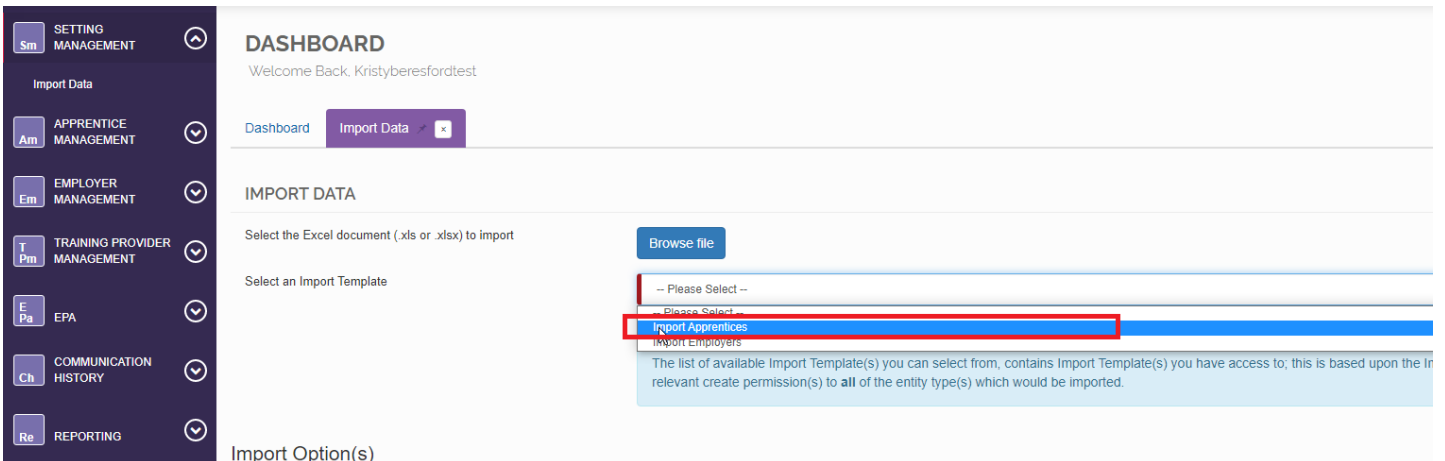
Within the SEPA platform select 'Setting Management' then 'Import Data'.



Select 'Browse File' and then select the completed bulk upload file from your computer.



Select 'Import Apprentices' from the drop-down menu.



Select 'Upload Data'

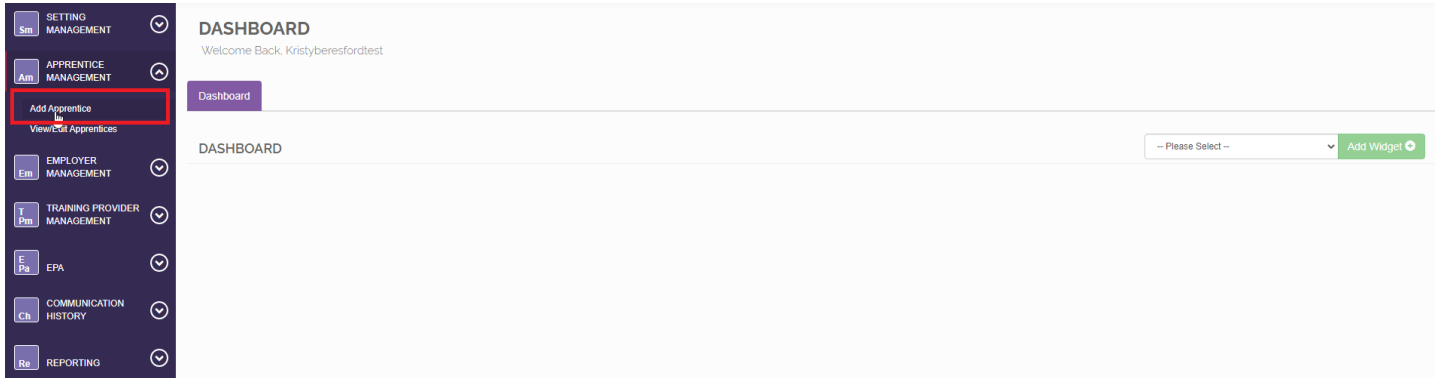
The screenshot shows the NCFE dashboard interface. On the left is a dark sidebar with navigation options: SETTING MANAGEMENT, Import Data, APPRENTICE MANAGEMENT, EMPLOYER MANAGEMENT, TRAINING PROVIDER MANAGEMENT, EPA, COMMUNICATION HISTORY, and REPORTING. The main content area is titled 'DASHBOARD' and 'IMPORT DATA'. It includes a 'Browse file' button, a dropdown menu for 'Import Apprentices' (currently showing 'Import Apprentices'), and a 'Troubleshooting' button. The 'Upload Data' button is highlighted with a red box. A 'CLOSE ALL TABS' button is visible in the top right corner.

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.

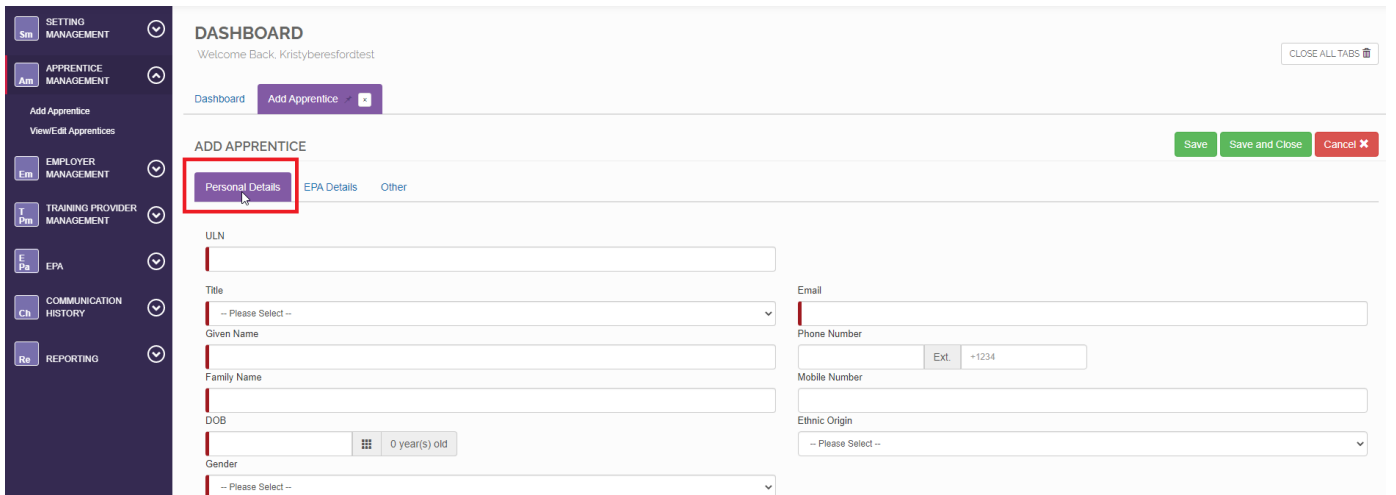
Registering Apprentices Individually

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



Personal Details Tab

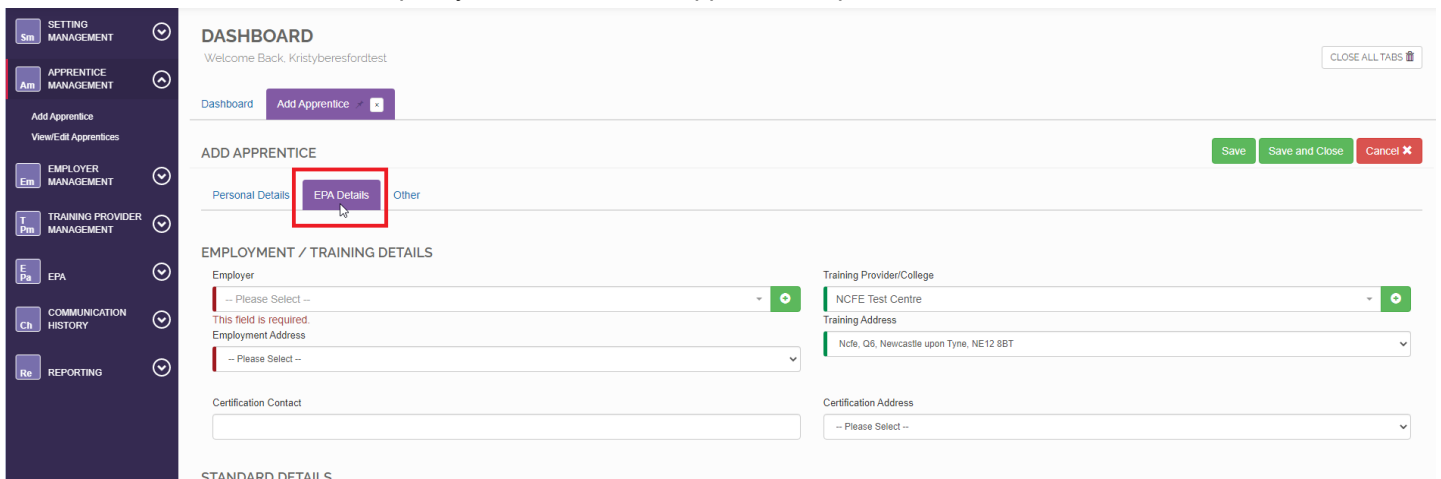
On the 'Personal Details' tab complete the mandatory fields which are identified by the red bar on the left of each box.



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.



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).

DASHBOARD
Welcome Back, Kristyberesfordtest

Dashboard Add Apprentice

ADD APPRENTICE Save Save and Close Cancel

Personal Details EPA Details Other

EMPLOYMENT / TRAINING DETAILS

Employer
-- Please Select -- +
This field is required.

Employment Address
-- Please Select --

Certification Contact

Training Provider/College
NCFE Test Centre +

Training Address
Ncf, 05, Newcastle upon Tyne, NE12 8BT

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.

DASHBOARD
Welcome Back, Kristyberesfordtest

Dashboard Add Apprentice

ADD APPRENTICE Save Save and Close Cancel

Personal Details EPA Details Other

EMPLOYMENT / TRAINING DETAILS

Employer
-- Please Select -- +
This field is required.

Employment Address
-- Please Select --

Certification Contact

Training Provider/College
NCFE Test Centre +

Training Address
Ncf, 05, Newcastle upon Tyne, NE12 8BT

Certification Address
-- Please Select --

STANDARD DETAILS

Standard Details

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

Certification Contact

Certification Address
-- Please Select --

STANDARD DETAILS

Standard
-- Please Select --
-- Please Select --
Administration
Business Administrator - Digital Delivery - Level 3 (196 - v1.00)
Dental & Health
Dental Nurse - Digital Delivery - Level 3 (61 - v1.00)
Dental Nurse (Integrated) - Digital Delivery - Level 3 (61 - v1.20)

Apprenticeship Length
0 Months 0 Days

EPA DETAILS
Apprenticeship Start Date Apprenticeship End Date (expected)

EPA Details

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.

Funding Type

Employer funded = levy.

Government funded = non-levy.

Standard Information

ASSESSMENT TYPES	LARS CODE	PUBLISHED DATE

Apprenticeship Length
 0 Months 0 Days

EPA DETAILS

Apprenticeship Start Date: 28/09/2021
 EPA Start Date (expected): 29/09/2022
 Registration Invoice Not yet specified
 EPA Invoice Not yet specified
 Line Manager Name:
 Apprentice Coordinator:
 Has EPA Membership?

Apprenticeship End Date (expected): 28/09/2022
 Registration PO Number:
 EPA PO Number:
 Assessor / Tutor Name:
 Line Manager Contact:

Funding Type
 -- Please Select --
 Government Funded
 Employer Funded

REASONABLE ADJUSTMENTS
 Are Reasonable Adjustments Required?

Reasonable Adjustments

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

Apprenticeship Length
 0 Months 0 Days

EPA DETAILS

Apprenticeship Start Date: 28/09/2021
 EPA Start Date (expected): 29/09/2022
 Registration Invoice Not yet specified
 EPA Invoice Not yet specified
 Line Manager Name:
 Apprentice Coordinator:
 Has EPA Membership?

Apprenticeship End Date (expected): 28/09/2022
 Registration PO Number:
 EPA PO Number:
 Assessor / Tutor Name:
 Line Manager Contact:

Funding Type
 -- Please Select --

REASONABLE ADJUSTMENTS
 Are Reasonable Adjustments Required?

REASONABLE ADJUSTMENTS

REASONABLE ADJUSTMENT NAME	EVIDENCE	EPA PROVIDER COMMENTS	STATUS	ACTIONS

Paper based MCQ assessment

ADD REASONABLE ADJUSTMENT

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'.

Dashboard Apprentices

FILTER

Name

Employer

Training Provider

Matched Assessor

Standard

Apprentice Status

PO No# or Invoice References

Custom Field Value

Expected EPA Start Date

Show Inactive?

SEARCH REFRESH

ULN	NAME	EPA EXP START DATE	GATEWAY ACCEPTANCE DATE	NO. OF DAYS IN ASSESSMENT	STATUS	LAST UPDATED DATE	IS ACTIVE?	OVERALL ASSESSMENT GRADE	CERTIFIED ON DATE	PROGRESS
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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.

The screenshot shows the 'EDIT APPRENTICE' form in the NCFE system. The 'Documents' tab is highlighted with a red box. The form contains the following fields:

- Uln: 1000049415
- Title: Mr
- Given Name: Craig
- Family Name: Miller test
- DOB: 29/01/1996 (25 year(s) old)
- Gender: Male
- Added On: 15/08/2021
- Email: leighann.elliott@ncfe.org.uk
- Phone Number: +1234
- Mobile Number: 07711220680
- Ethnic Origin: -- Please Select --

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.

The screenshot shows the 'EDIT APPRENTICE' form in the NCFE system. The 'Checklist' tab is highlighted with a red box. The form contains the following fields:

- Uln: 1000049415
- Title: Mr
- Given Name: Craig
- Family Name: Miller test
- DOB: 29/01/1996 (25 year(s) old)
- Gender: Male
- Added On: 15/08/2021
- Email: leighann.elliott@ncfe.org.uk
- Phone Number: +1234
- Mobile Number: 07711220680
- Ethnic Origin: -- Please Select --

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

ITEMS

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	<input type="checkbox"/>
The Apprentice has achieved their Level 2 in English	<input type="checkbox"/>
The Apprentice has achieved their Level 2 in Mathematics	<input type="checkbox"/>
The apprentice has created a work based project report - This must not be the project presentation	<input type="checkbox"/>
The apprentice has created a CPD Log	<input type="checkbox"/>
The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence	<input type="checkbox"/>
The apprentice has completed the NCFE EPA evidence tracker	<input type="checkbox"/>
The training provider has completed the EPA Booking request form	<input type="checkbox"/>

SIGN OFF

Signed Off by Training Provider?

Signed Off by NCFE?

DETAILS

Completed On

The Items checklist must be completed first.

Checklist

ITEMS

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	<input type="checkbox"/>
The Apprentice has achieved their Level 2 in English	<input type="checkbox"/>
The Apprentice has achieved their Level 2 in Mathematics	<input type="checkbox"/>
The apprentice has created a work based project report - This must not be the project presentation	<input type="checkbox"/>
The apprentice has created a CPD Log	<input type="checkbox"/>
The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence	<input type="checkbox"/>
The apprentice has completed the NCFE EPA evidence tracker	<input type="checkbox"/>
The training provider has completed the EPA Booking request form	<input type="checkbox"/>

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.

Checklist

ITEMS

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	<input checked="" type="checkbox"/>	<table border="1"> <thead> <tr> <th colspan="5">CHECKLIST EVIDENCE</th> </tr> <tr> <th>DOCUMENT NAME</th> <th>TYPE</th> <th>UPLOADED BY</th> <th>DATE UPLOADED</th> <th>ACTIONS</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="text-align: right;">ADD DOCUMENT</td> </tr> </tbody> </table>	CHECKLIST EVIDENCE					DOCUMENT NAME	TYPE	UPLOADED BY	DATE UPLOADED	ACTIONS	ADD DOCUMENT				
CHECKLIST EVIDENCE																	
DOCUMENT NAME	TYPE	UPLOADED BY	DATE UPLOADED	ACTIONS													
ADD DOCUMENT																	
The Apprentice has achieved their Level 2 in English	<input type="checkbox"/>																
The Apprentice has achieved their Level 2 in Mathematics	<input type="checkbox"/>																
The apprentice has created a work based project report - This must not be the project presentation	<input type="checkbox"/>																
The apprentice has created a CPD Log	<input type="checkbox"/>																
The apprentice has completed the portfolio and this does not exceed 25 discrete pieces of evidence	<input type="checkbox"/>																
The apprentice has completed the NCFE EPA evidence tracker	<input type="checkbox"/>																
The training provider has completed the EPA Booking request form	<input type="checkbox"/>																

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.

SIGN OFF

Signed Off by Training Provider?

Signed Off by NCFE?

DETAILS

Completed On

Select 'Save' to update the Apprentice record.

Dashboard Apprentices [Edit Apprentice](#)

EDIT APPRENTICE Apprentice Status - Gateway Unassigned [Save](#) [Save and Close](#) [Save and New](#) [Cancel](#) [Delete Apprentice](#) [Deactivate Apprentice](#)

Personal Details EPA Details Documents **Checklist** Booking(s) / Resit(s) Product(s) Tracked Changes Other Notes

Checklist

ITEMS

CHECKLIST		CHECKLIST DOCUMENT COUNT - 0
QUESTION	ANSWER	
The training provider has signed the EPA Plus Declaration Form following the tripartite meeting to agree apprentice readiness for EPA, and retains evidence of this.	<input type="checkbox"/>	

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'.

The screenshot shows the 'Edit Apprentice' page in the NCFE system. The left-hand navigation menu is visible, with the 'Documents' tab highlighted in a red box. The main content area shows the 'EDIT APPRENTICE' form with various fields for personal details, contact information, and dates. The 'Documents' tab is selected, and the page title is 'Apprentice Status - Assessment Pending Confirmation'.

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

The screenshot shows the 'Documents for Craig Miller test' page. The 'Documents' tab is selected in the navigation menu. The main content area displays the title 'Documents for Craig Miller test' and a description: 'This area provides a location for you to upload documents or evidence for your Apprentice. Any changes made in this area are automatically saved.' A red box highlights the '+ ADD DOCUMENT' button in the top right corner.

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

The screenshot shows the 'Documents for Craig Miller test' page with a document listed. The 'Documents' tab is selected in the navigation menu. The main content area displays the title 'Documents for Craig Miller test' and a description: 'This area provides a location for you to upload documents or evidence for your Apprentice. Any changes made in this area are automatically saved.' A table lists the document 'Craig Miller test.docx' with a '7 days ago' upload date. A red box highlights the 'MARK AS EVIDENCE' button in the 'Evidence details' column.

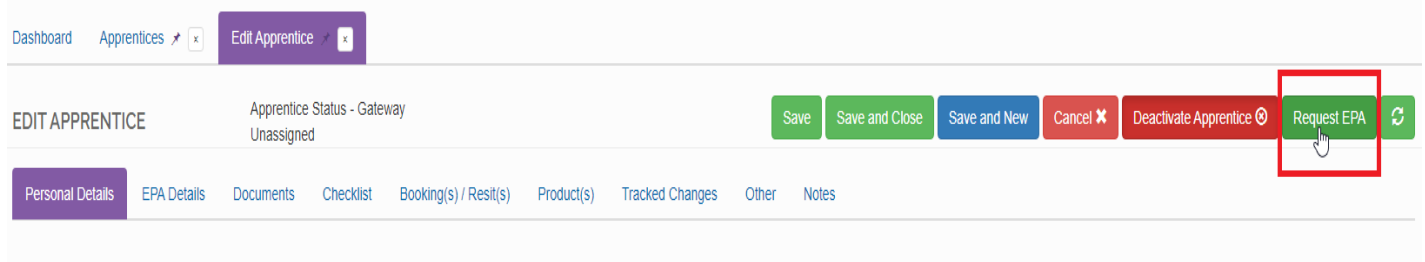
You can view more options for the document once it has been uploaded by using the 3 dots.

The screenshot displays the 'EDIT APPRENTICE' interface. On the left is a dark sidebar with navigation options: SETTING MANAGEMENT, APPRENTICE MANAGEMENT, EMPLOYER MANAGEMENT, TRAINING PROVIDER MANAGEMENT, EPA, COMMUNICATION HISTORY, and REPORTING. The main content area is titled 'DASHBOARD' and 'EDIT APPRENTICE'. Below the title bar, there are tabs for 'Personal Details', 'EPA Details', 'Documents', 'Checklist', 'Booking(s) / Result(s)', 'Tracked Changes', 'Other', and 'Notes'. The 'Documents' tab is active, showing a table of documents for 'Craig Miller test'. The table has columns for 'Document name', 'Evidence details', and 'Uploaded'. A document named 'Craig Miller test.docx' is listed with a 'MARK AS EVIDENCE' button. A context menu is open over the document, listing options: 'Change file', 'Download file', 'Preview', 'View full details', and 'Delete'. A red box highlights the three-dot menu icon in the top right corner of the document row.

Once all files are uploaded, select 'Save'.

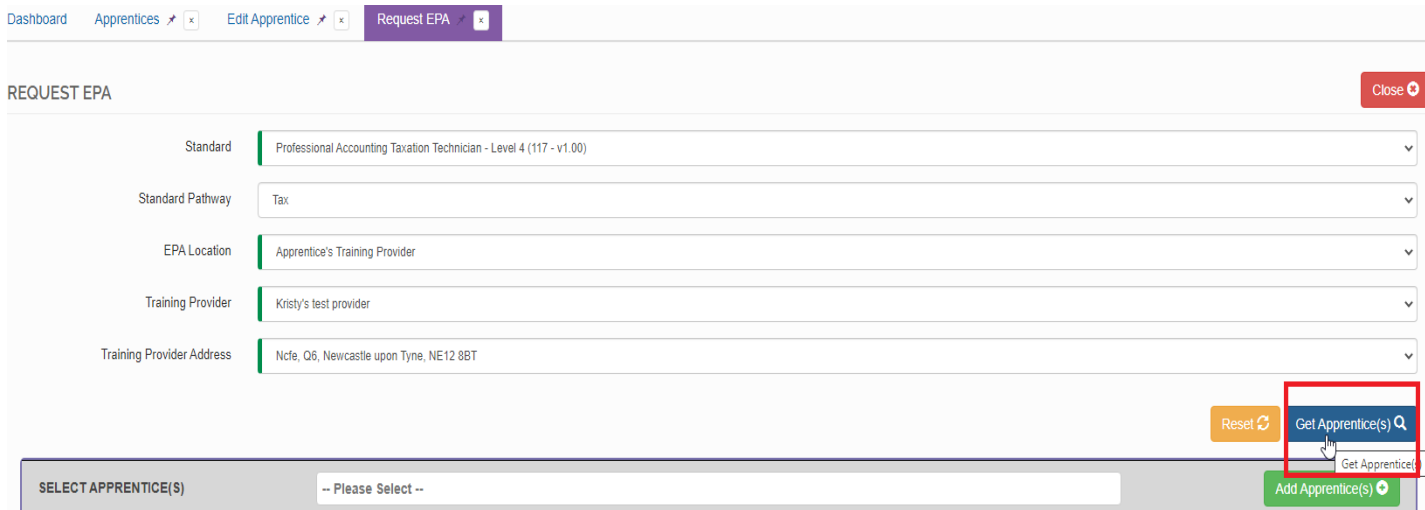
Requesting EPA

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.



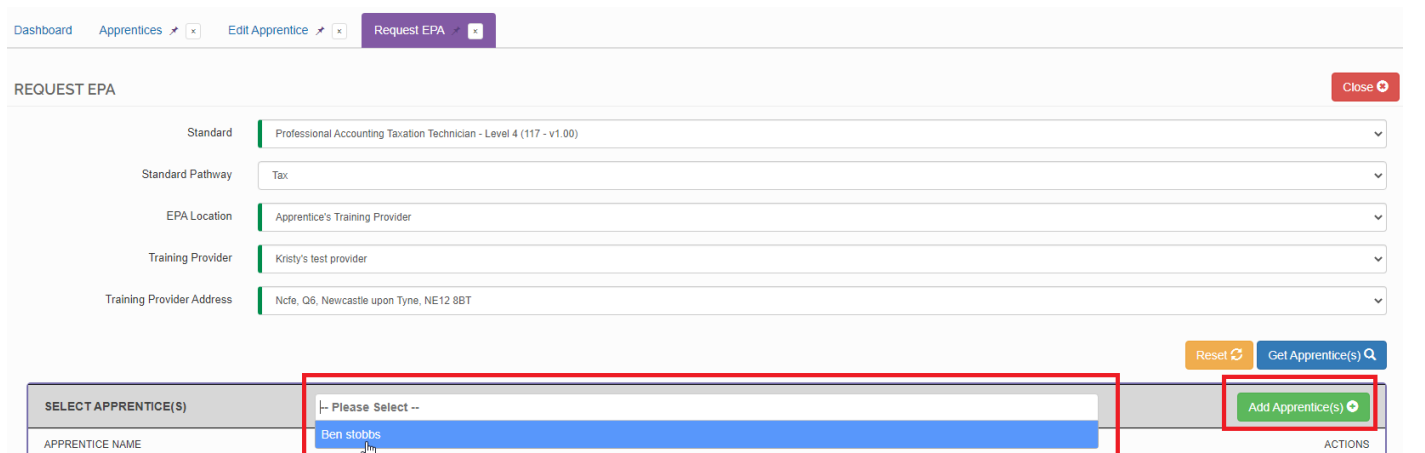
If the information isn't already prepopulated in the boxes on the next screen, you must select them to match what is on the apprentice record already, starting with either Face to Face or Digital assessment methods, followed by either 'Apprentices Training Provider' or 'Apprentice's Workplace' for the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

Click 'Get Apprentice(s)'.
Click 'Get Apprentice(s)'.



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.



Select 'Match Assessor'.

Dashboard Apprentices x Edit Apprentice x Request EPA x

REQUEST EPA Close

Standard Professional Accounting Taxation Technician - Level 4 (117 - v1.00)

Standard Pathway Tax

EPA Location Apprentice's Training Provider

Training Provider Kristy's test provider

Training Provider Address Ncfe, O6, Newcastle upon Tyne, NE12 8BT

Reset Get Apprentice(s)

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

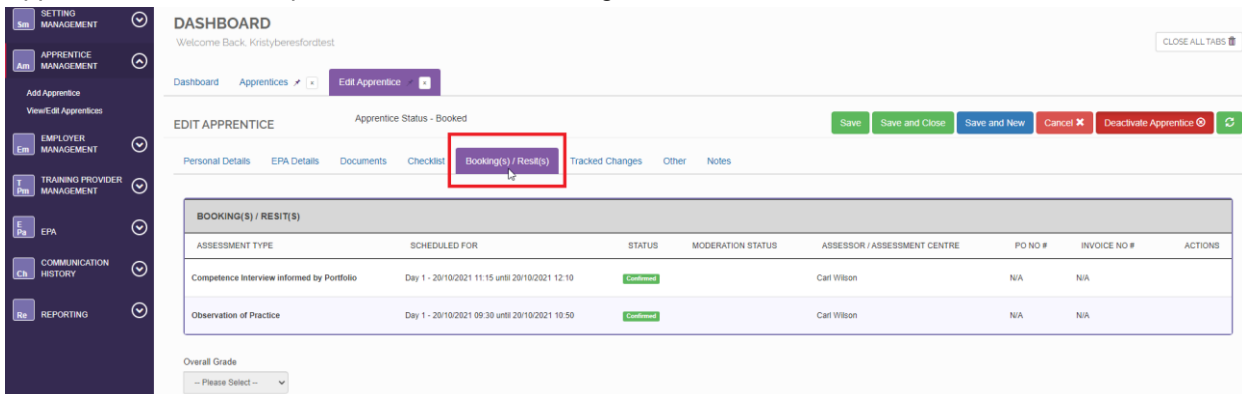
Match Assessor(s)

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)".

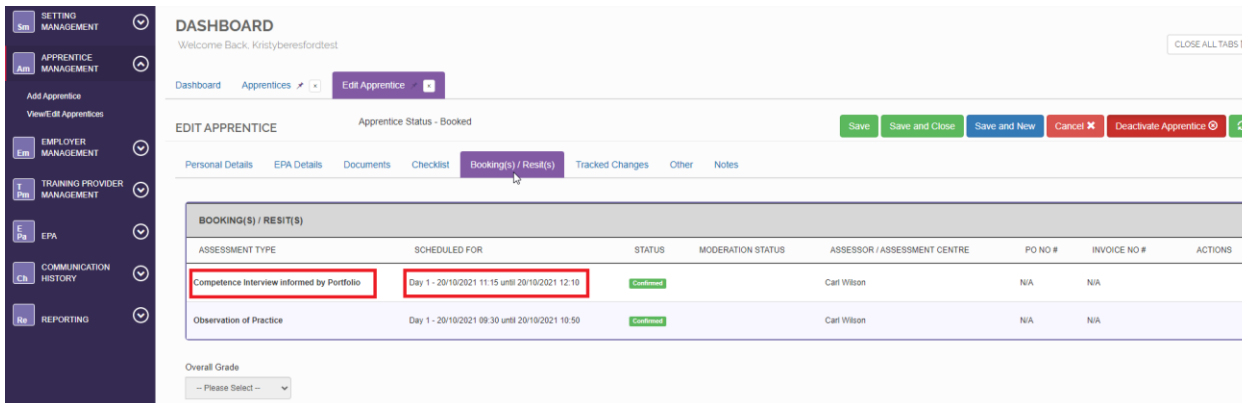
The 'Request EPA' process is now complete.

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.



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

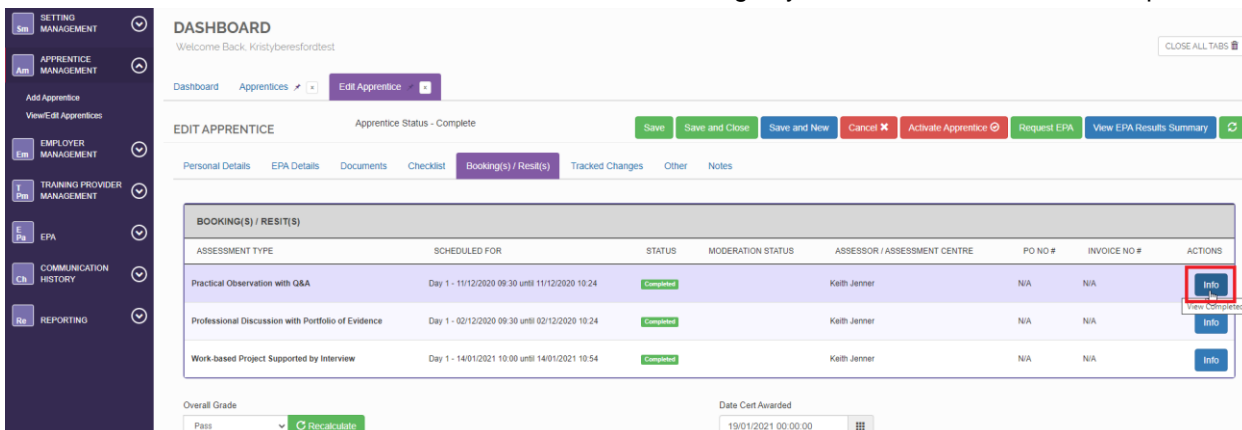


If you have any queries with the bookings, please contact the IEPA assigned for that apprentice.

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.



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?

STATUS HISTORY	
STATUS	DATE CHANGED
New	21/09/2021 12:09

-- Please Select --
CHANGE STATUS +

- Please Select --
- Pending Functional Skills
- Sickness
- Maternity Leave
- Sabbatical
- Paternity Leave
- Withdrawn
- On Hold

REASONABLE ADJUSTMENTS

Are Reasonable Adjustments Required?

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 MANAGEMENT
- APPRENTICE MANAGEMENT
- EMPLOYER MANAGEMENT
- TRAINING PROVIDER MANAGEMENT
- EPA
- COMMUNICATION HISTORY
- REPORTING

DASHBOARD

Welcome Back, Kristyberesfordtest

Dashboard Apprentices Edit Apprentice

CLOSE ALL TABS

EDIT APPRENTICE

Apprentice Status - Failed ULN Check

Save Save and Close Save and New Cancel Deactivate Apprentice

Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other Notes

ULN 1000354117 Added On 25/08/2021

Title Miss Email leighannellott@ncfe.org.uk

Given Name Craig GA Phone Number Ext. +1234

Family Name Miller Mobile Number 07711220680

DOB 01/06/2000 21 year(s) old Ethnic Origin -- Please Select --

Gender Female

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.

The screenshot shows the 'ADD EMPLOYER' form. The left sidebar contains navigation options: SETTING MANAGEMENT, APPRENTICE MANAGEMENT, EMPLOYER MANAGEMENT (highlighted), TRAINING PROVIDER MANAGEMENT, EPA, COMMUNICATION HISTORY, and REPORTING. The main content area is titled 'DASHBOARD' and 'ADD EMPLOYER'. It features a 'Name' text input, an 'Employer ID' text input, an 'ESFA Funded?' dropdown menu (currently set to 'Not Set'), a 'Contract Required?' dropdown menu (set to '-- Unknown --'), and a 'Contract' text input. Below the form is an 'ADDRESSES' table with columns: PRIMARY, TYPE, ADDRESS LINE 1, ADDRESS LINE 2, TOWN, COUNTY, POSTCODE, and ACTIONS. A green 'ADD ADDRESS' button is located in the top right corner of the table area.

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).

This screenshot shows the 'ADD EMPLOYER' form with the 'ESFA Funded?' dropdown menu open. The dropdown menu is highlighted with a red box and shows three options: 'Not Set', 'True', and 'False'. The 'True' option is currently selected and highlighted in blue. The rest of the form and sidebar are identical to the previous screenshot.

Contract Required?

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

The screenshot shows the 'ADD EMPLOYER' form in a web application. The 'Contract Required?' dropdown menu is highlighted with a red box and is set to 'No'. The form includes fields for Name, Employer ID, ESFA Funded?, and Contract. At the bottom, there is an 'ADDRESSES' table with columns for PRIMARY, TYPE, ADDRESS LINE 1, ADDRESS LINE 2, TOWN, COUNTY, POSTCODE, and ACTIONS. An 'ADD ADDRESS' button is visible in the top right of the table.

Employer Addresses

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

This screenshot is similar to the previous one, but the 'ADD ADDRESS' button in the 'ADDRESSES' table is highlighted with a red box. The 'Contract Required?' dropdown is also visible and set to 'No'.

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.

The screenshot shows the 'ADDRESSES' table with the 'TYPE' dropdown menu open. The 'Business' option is selected and highlighted with a red box. The dropdown menu also shows 'Home' and 'Branch Office' options. The 'ADD ADDRESS' button is also visible.

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'.



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.

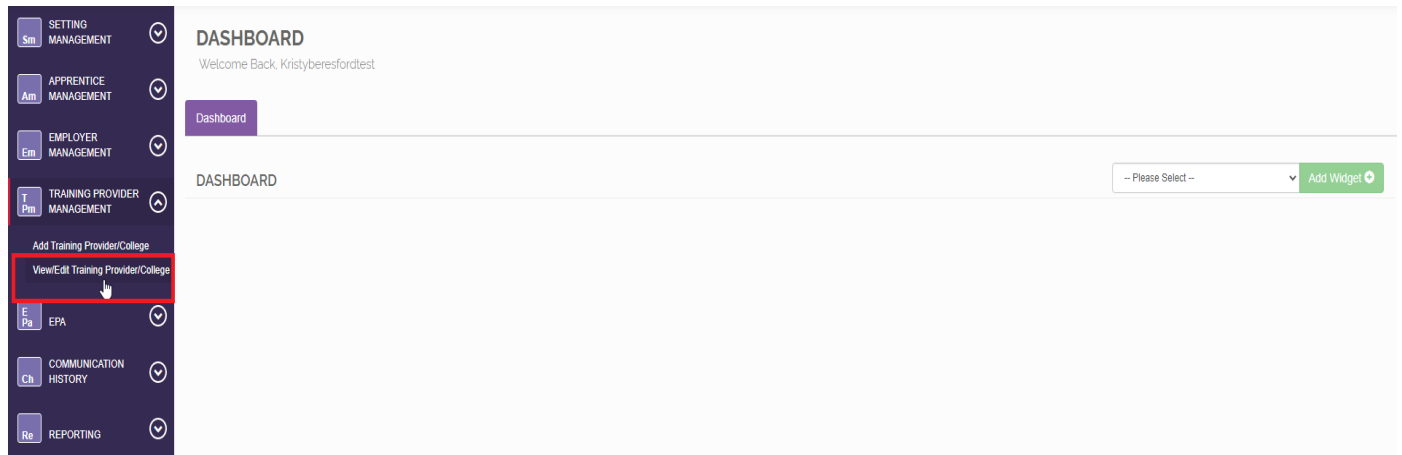
Fill in all mandatory fields then Click 'Save'. The Employer is now set up and stored within SEPA and will be able to be selected for future apprentices.

Training Provider Management

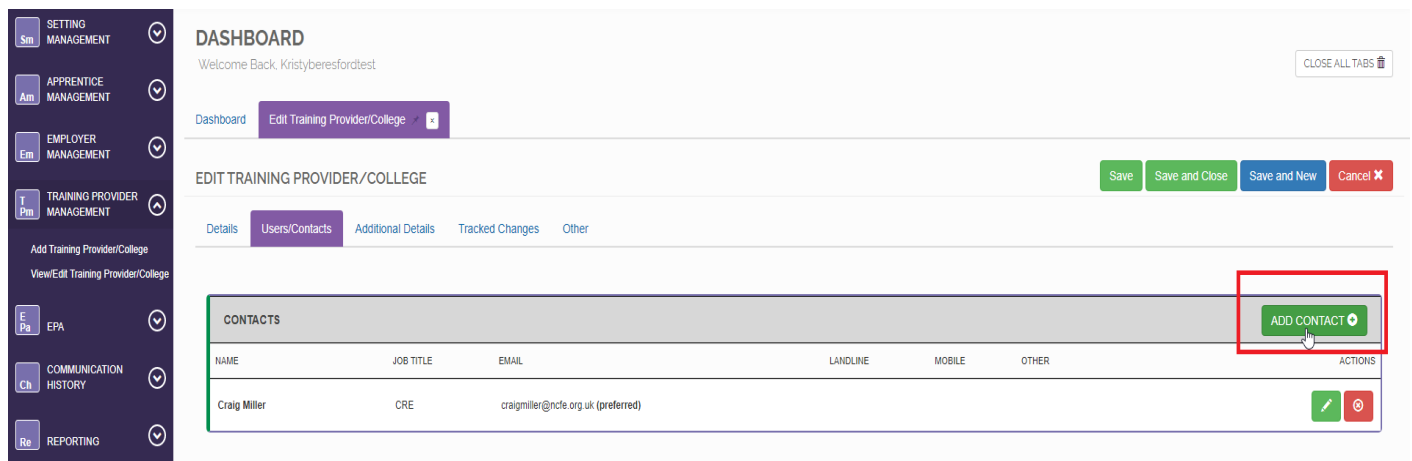
Adding Contacts

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



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



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

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Tel: 0191 240 8950*

Email: eparelationshipteam@ncfe.org.uk

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

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