

# SmartEPA (SEPA) Training Guide

September 2022

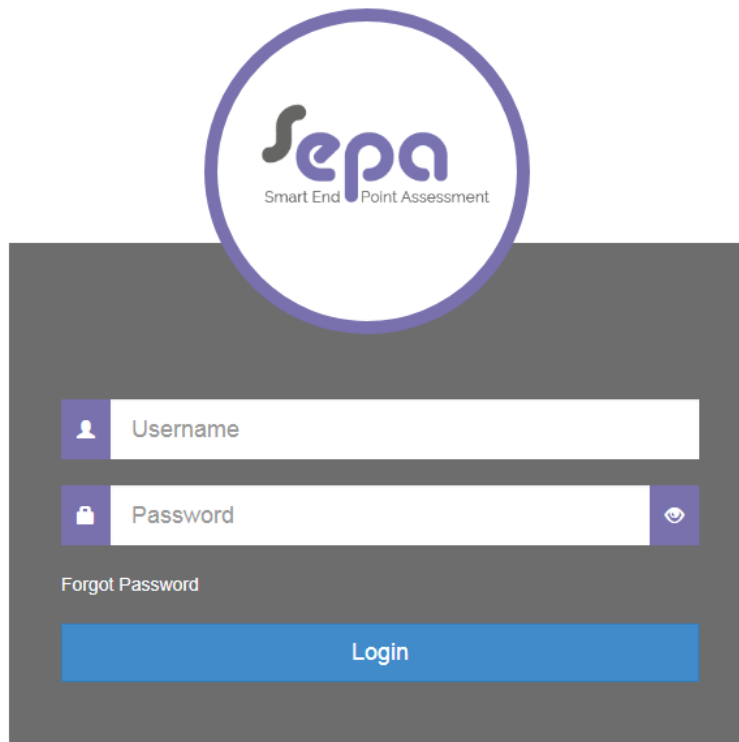
Issue 3

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# 1. Accessing the Smart EPA Platform

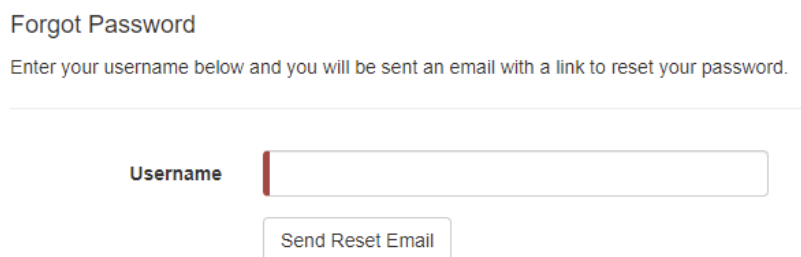
Go to the website [www.smartepa.co.uk](http://www.smartepa.co.uk)



Type your username and password into the log in box and click 'Login'.

## Forgotten Smart EPA Password

If you have forgotten your password click 'Forgot Password'.



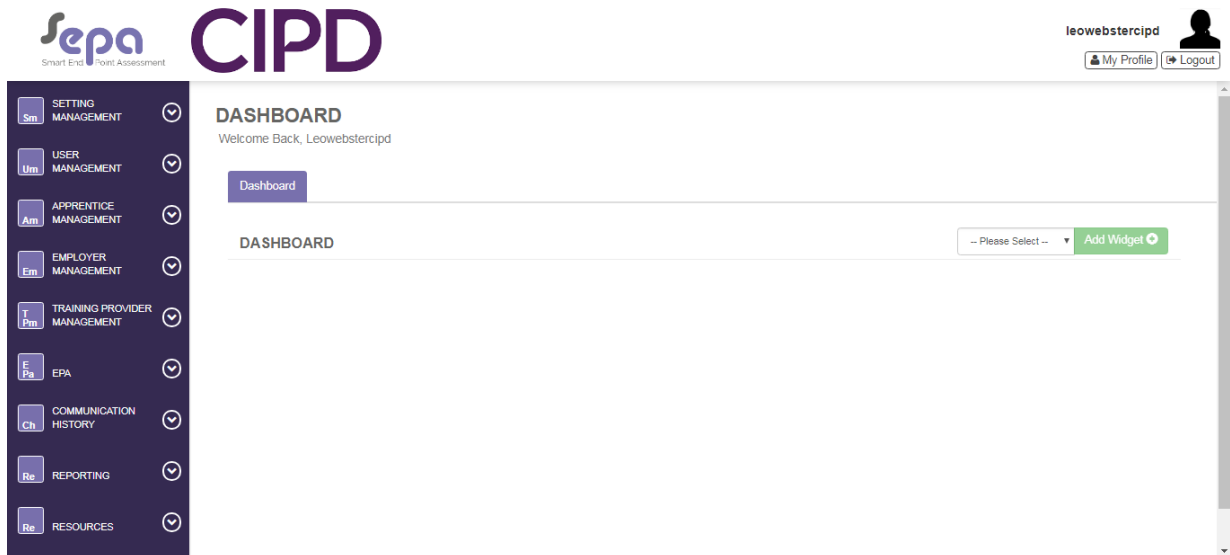
Type in your username and click 'Send Reset Email'.

An automated email will be sent to you by the SEPA platform with instructions to reset your password.

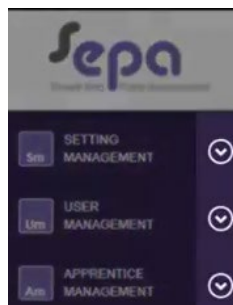
## 2. Navigation Menu

On the left side of the webpage is the navigation menu. The navigation menu allows you to access different areas of the system to manage your apprentices, employers and End Point Assessments (EPAs).

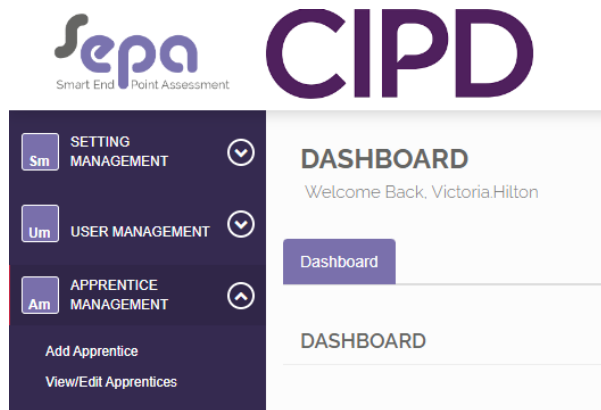
This screenshot shows the areas you can access as a Training Provider.



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

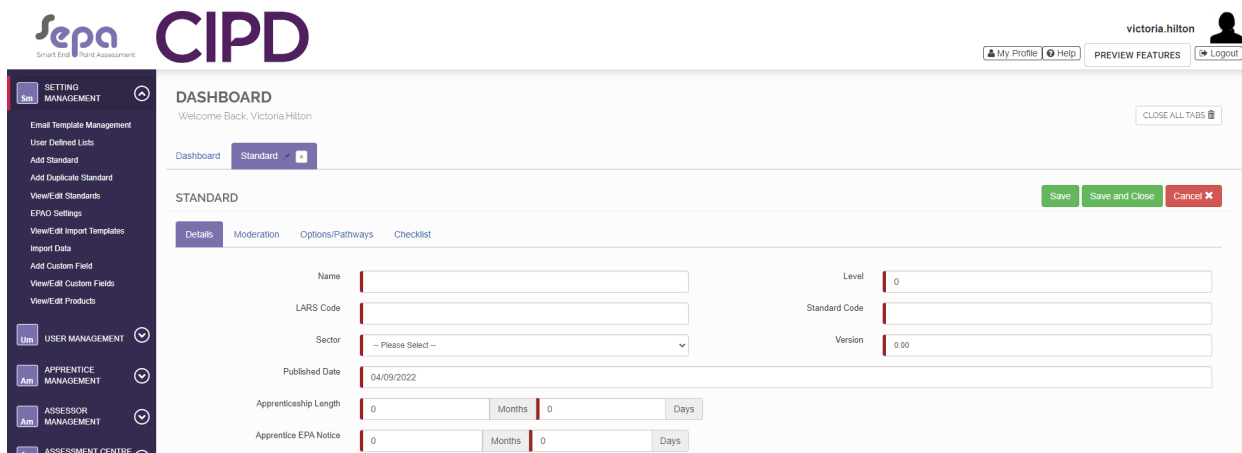


On the expanded area, click the relevant text to open the sub-area.

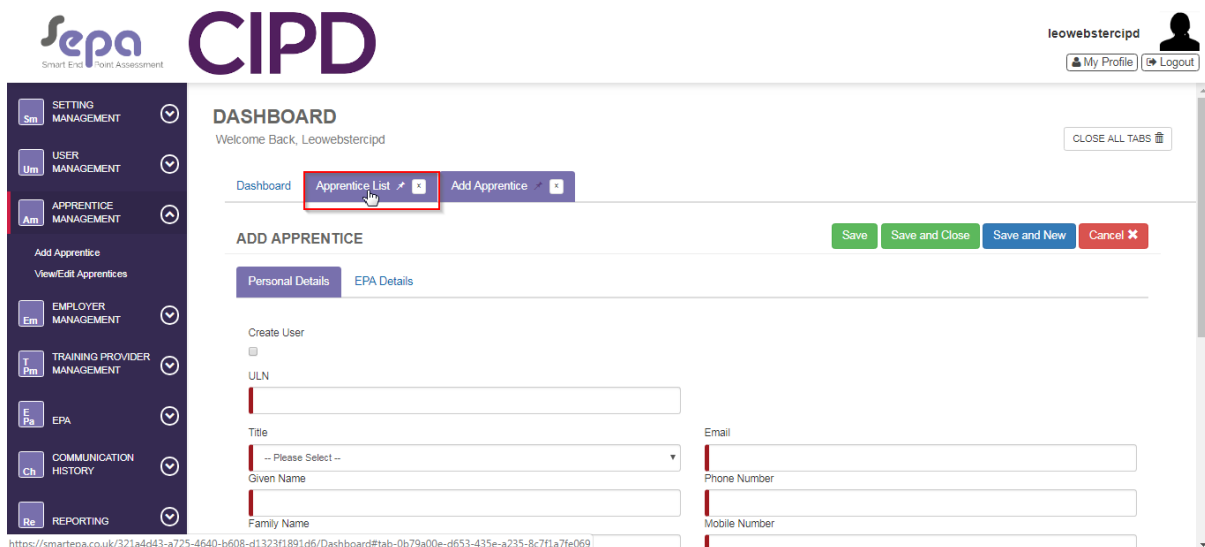


The sub-area displays a page in the main part of the window. The tabs across the top of the page show open pages.

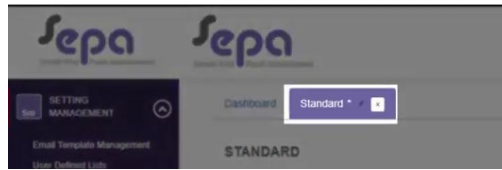
On any page where you are required to enter information, mandatory fields show a red line on the left side of the text box; they turn green when they have been completed correctly.



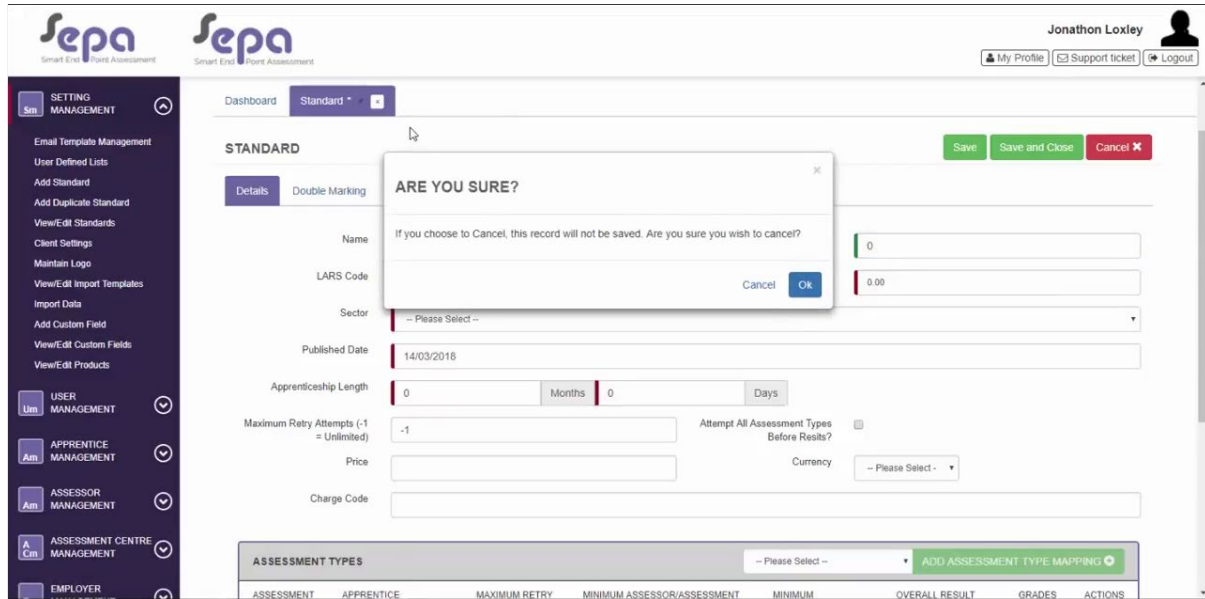
All pages that you open you will remain open as tabs until you close them using the 'x' symbol.



An asterisk on the tab shows a page has been edited but not saved. You must save edits before navigating away.



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



### 3. Employer Management

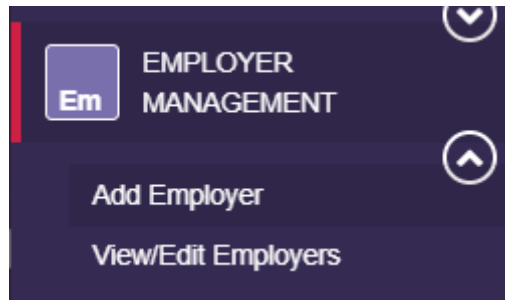
This section is for recording the details of an apprentice's employer.

**Note:** Before adding an apprentice to SEPA, make sure the employer's information is/has been added first.

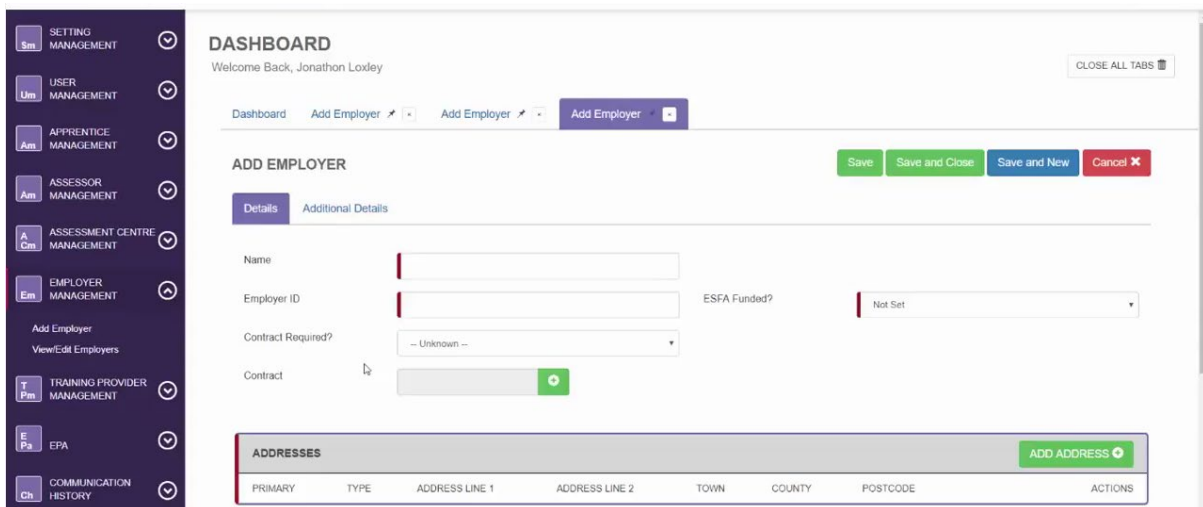
#### Adding an Employer Record

To add a new employer select 'Employer Management' from the Navigation Menu.

Select 'Add Employer'



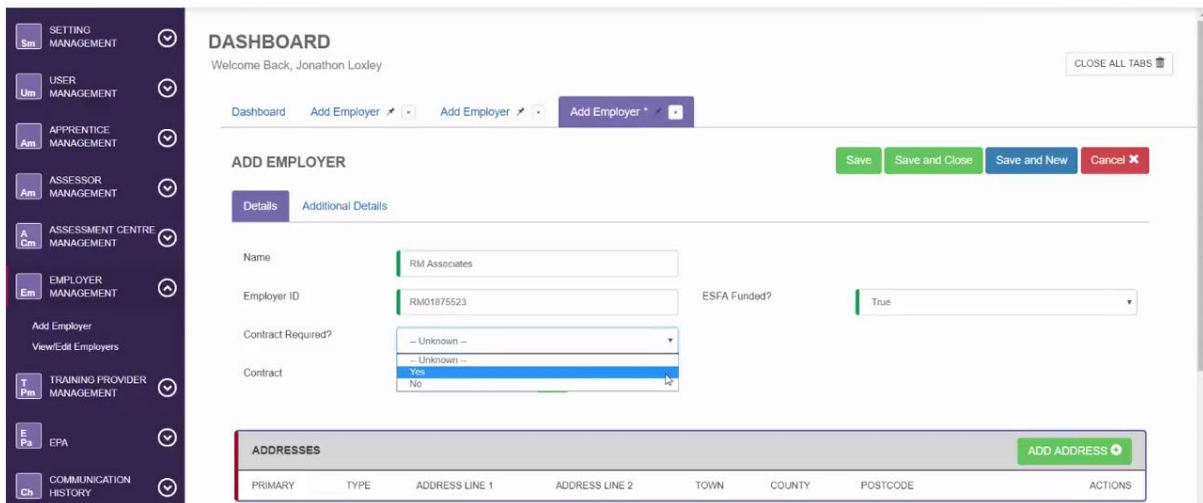
From 'Add Employer' create an employer by entering the company information.



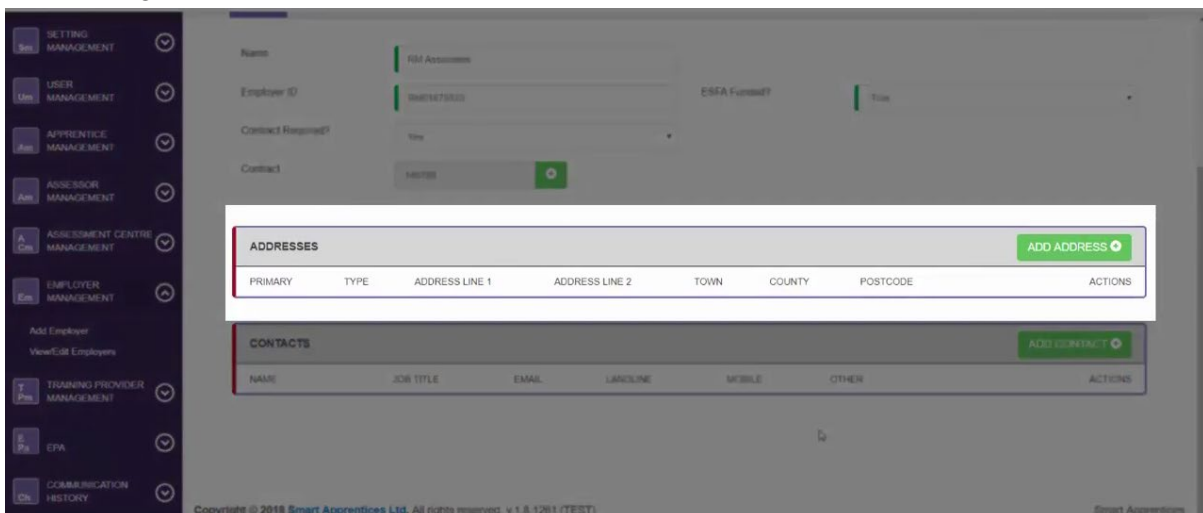
Complete the name and employer ID (this is their Companies House number).

For 'ESFA Funded?', choose which funding option is applicable for the employer. The options are either: 'TRUE' (non-levy) or 'FALSE' (levy).

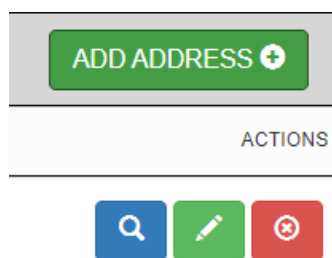
Ensure the 'Contract Required?' field is set to: 'No'.



Select 'ADD ADDRESS' on the 'ADDRESSES' field and complete the address for the employer using their Head Office address.

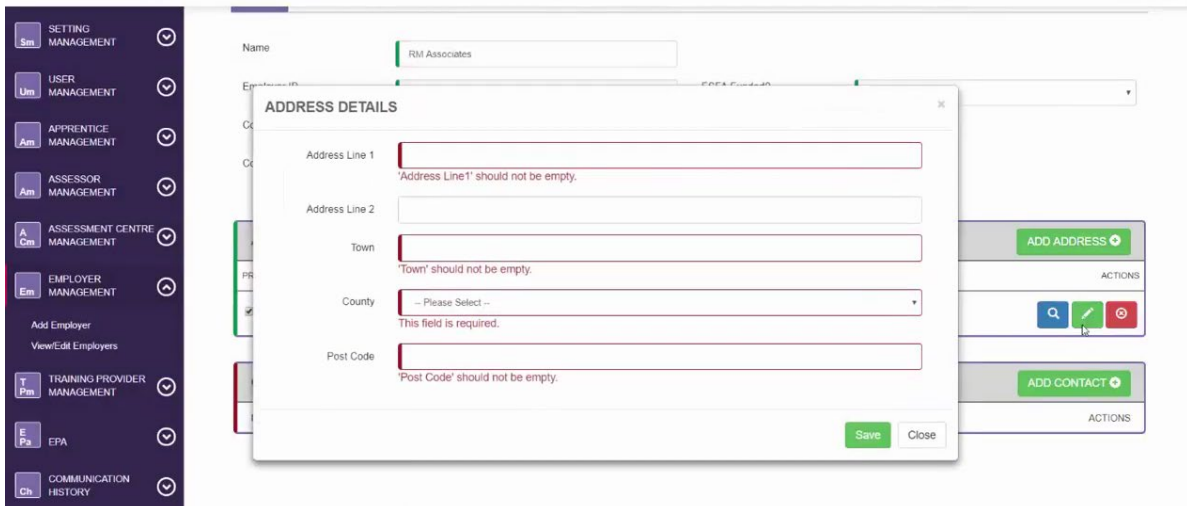


You can use the magnifying glass to search for the employer's address using their postcode.

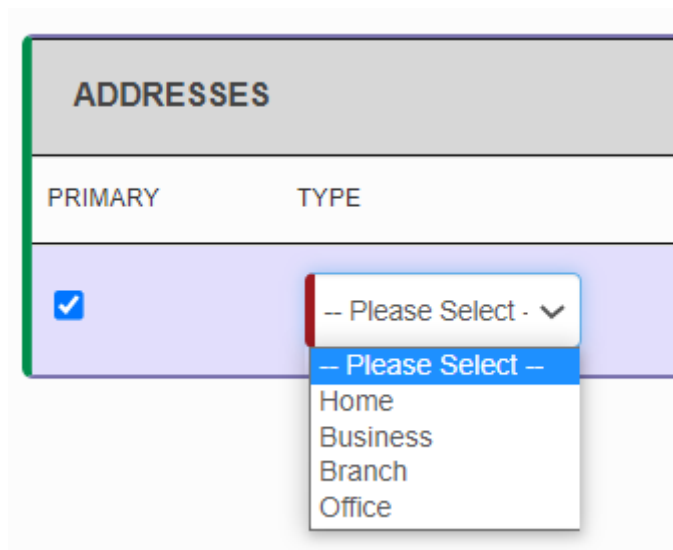


Alternatively, use the pencil icon to enter the address manually.





Once the Head Office address has been entered correctly, select from the drop down list entitled 'TYPE' the most suitable option for the employer (usually this is 'Business').

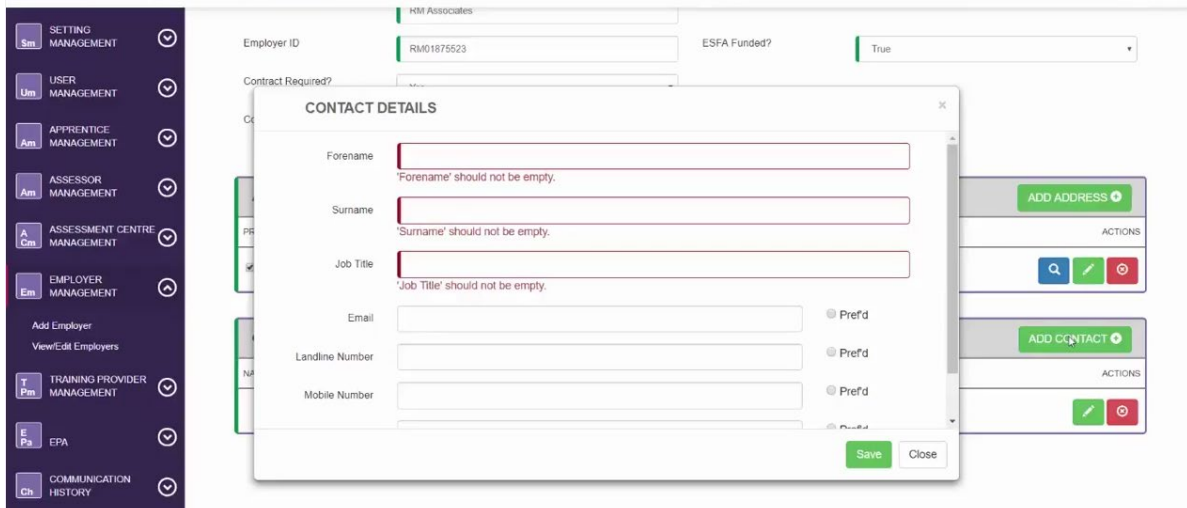


On the tab entitled 'Users/Contacts', complete the details for the named employer contact responsible for the apprentice. This may be apprentice's line manager or the apprenticeship programme manager. Employers will have different arrangements depending on their set up.

This person will receive automated emails from the SEPA platform.

They must be in a position to act upon the emails accordingly and ensure arrangements for the apprentice's End Point Assessment (EPA) are adhered to. In most cases it is best for this to be the apprenticeship programme manager.

Select the 'Save' button when the details have been completed correctly.

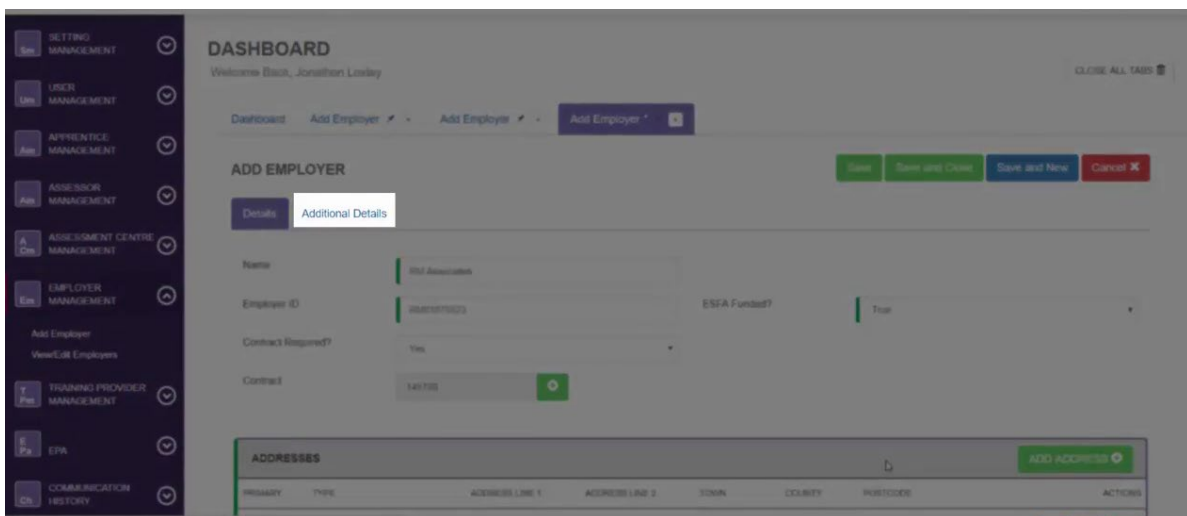


The Employer is now set up and stored within SEPA.

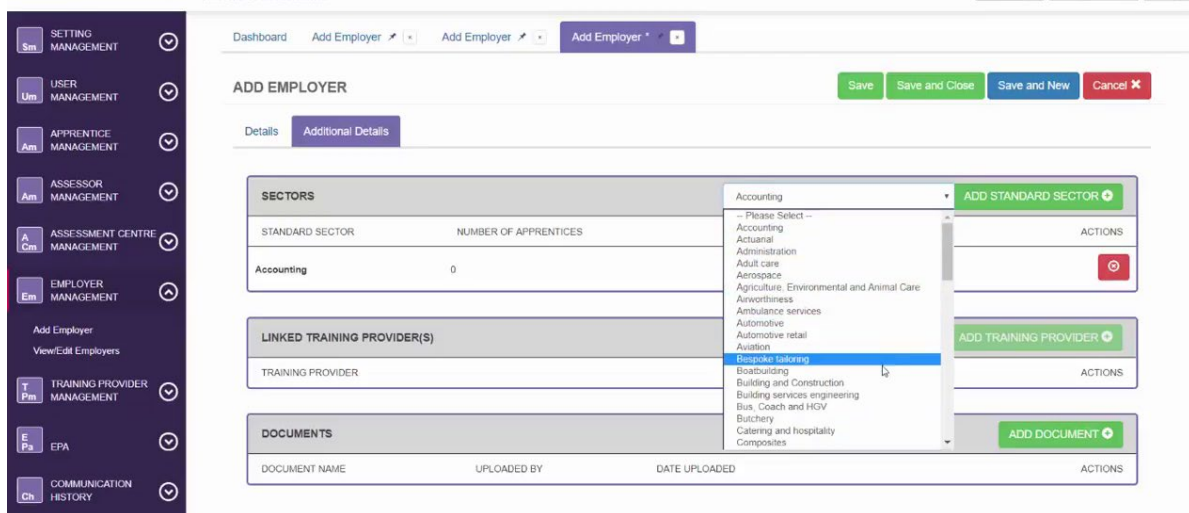
## Adding a Sector to an Employer Record

As an optional next step you are able to assign sectors to your employers. This highlights the industry their operate in.

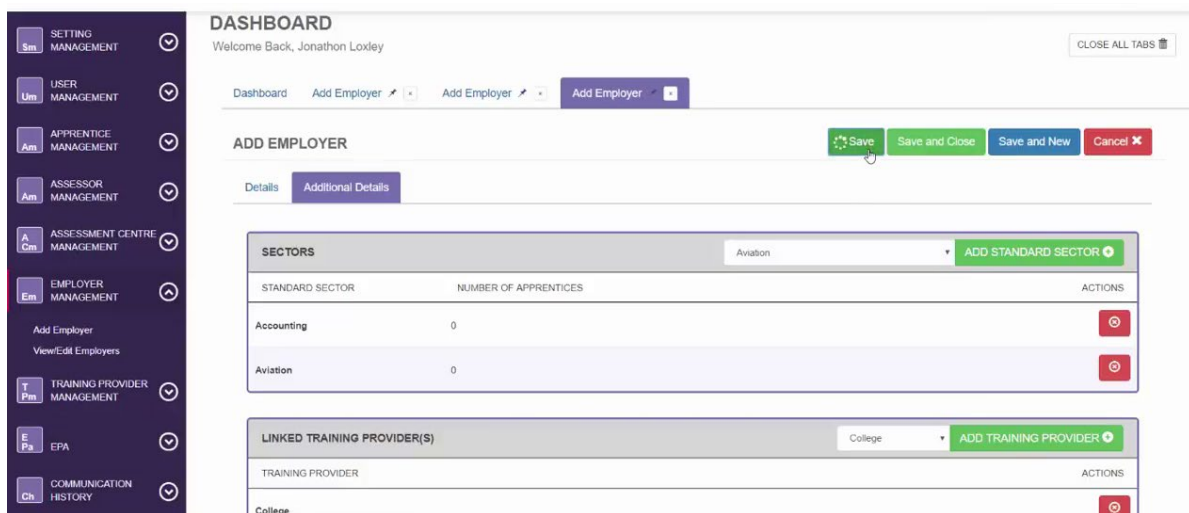
Select the 'Additional Details' tab within the 'Add Employer'.



To add a specific sector to an employer, select the 'Sectors' dropdown list and then select 'Add Standard Sector'.



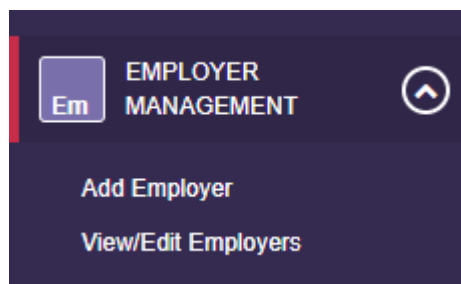
All Sectors added will show under the 'Sectors' section.



Select 'Save' to add the employer to the sector.

## Amending an Employer Record

To amend an Employer Record you must first select 'Employer Management' from the navigation and click 'View/Edit Employers' from the options.



The list of employers you are able to edit will appear as a list or you can use the search function.

The screenshot shows the CIPD dashboard with a sidebar on the left containing menu items like 'SETTING MANAGEMENT', 'USER MANAGEMENT', 'APPRENTICE MANAGEMENT', 'EMPLOYER MANAGEMENT', 'TRAINING PROVIDER MANAGEMENT', 'EPA', 'COMMUNICATION HISTORY', 'REPORTING', and 'RESOURCES'. The main content area is titled 'DASHBOARD' and 'Welcome Back, MyEPA.TProvider.Dummy'. Below this, there's a 'Dashboard' breadcrumb and a dropdown menu for 'Employers'. A 'FILTER' section has a 'Show Inactive?' checkbox. A table titled 'EMPLOYERS' has columns for 'COMPANY NAME', 'EMPLOYER ID', and 'IS ACTIVE?'. The table contains two entries: 'Leo's Test Employer' with ID '5' and 'Test Employer' with ID 'TEST'. A search bar and 'REFRESH' button are at the top right of the table. At the bottom, it says 'Showing 1 to 2 of 2 entries' and has 'Previous', '1', and 'Next' navigation options.

Click on the employer you would like to amend and a new tab will appear.

The screenshot shows the 'EDIT EMPLOYER' form. The breadcrumb is 'Dashboard > Employers > Edit Employer'. At the top right, there are buttons for 'Save', 'Save and Close', 'Save and New', and 'Cancel'. The form has three tabs: 'Details', 'Users/Contacts', and 'Additional Details'. The 'Details' tab is active. Fields include: 'Name' (Test Employer), 'Employer ID' (TEST), 'Contract Required?' (No), and 'Contract' (empty). On the right, 'Number of Apprentices' is 14 and 'ESFA Funded?' is False. Below the form is an 'ADDRESSES' table with columns: PRIMARY, TYPE, ADDRESS LINE 1, ADDRESS LINE 2, TOWN, COUNTY, POSTCODE, and ACTIONS. One address is shown: PRIMARY checked, TYPE Business, ADDRESS LINE 1 Nctc, ADDRESS LINE 2 Q5, TOWN Newcastle upon Tyne, COUNTY Tyne and Wear, POSTCODE NE12 8BT. There are edit (pencil) and delete (cross) icons in the ACTIONS column.

You are then able to amend the 'Name', 'Employer ID' or other options shown.

If you need to amend the employer address, click on the green pencil to the right of the address shown. If you need to delete the address you can click the red button showing the cross.

A pop-up window will appear once the edit pencil button is clicked where you can change the address as needed.

1:Dummy

### ADDRESS DETAILS

Address Line 1

Address Line 2

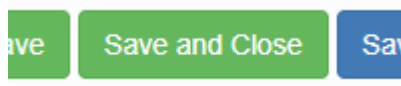
Town

County

Post Code

Click 'Save' to update your changes and the window will close automatically.

Once all actions have been completed for the employer you can click the 'Save and Close' button at the top of the tab to save all changes and close the tab.



## 4. Apprenticeship Management

This section is for recording apprentices details.

**Note:** please add all apprentices to SmartEPA a minimum of 3 months before their expected gateway date.

### Adding an Apprenticeship Record

To set up apprentices on SEPA go to 'Apprenticeship Management'. There are two options; you can either complete the details for each apprentice individually or you can do a bulk upload.

To complete the details for the individual apprentice select 'Add Apprenticeship'.



Within the tab entitled 'Personal Details' complete the mandatory fields.

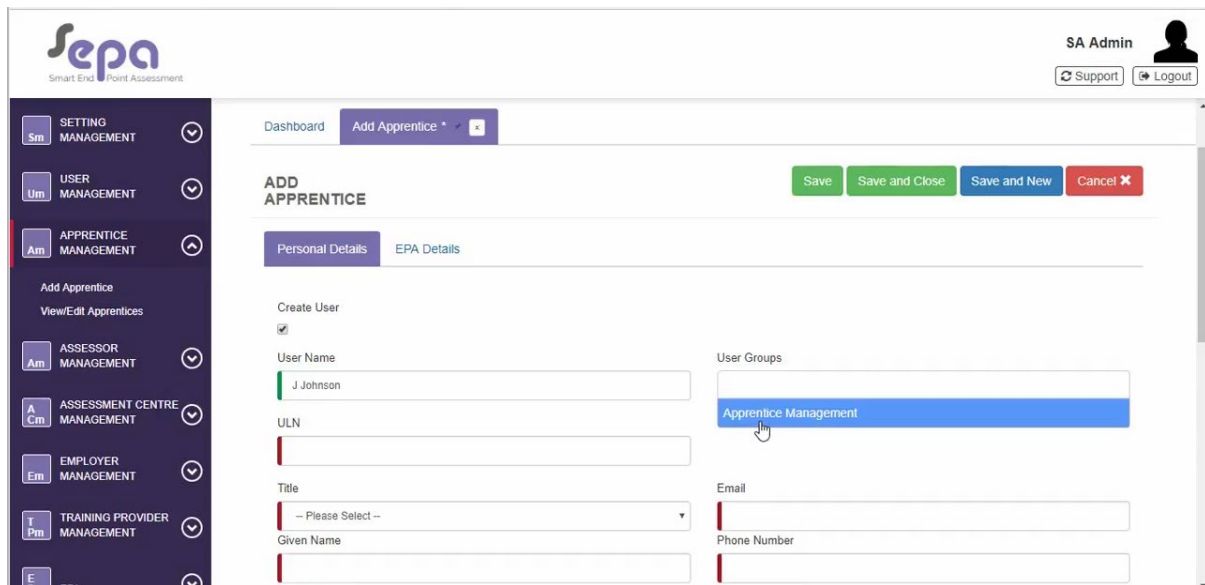
A screenshot of the SEPA web application interface. The top left shows the 'sepa' logo with the tagline 'Smart End Point Assessment'. The top right shows the user 'SA Admin' with a profile icon and buttons for 'Support' and 'Logout'. A 'CLOSE ALL TABS' button is also present. The main content area is titled 'DASHBOARD' and 'Welcome Back, SA Admin'. A navigation bar includes 'Dashboard' and 'Add Apprenticeship'. The 'ADD APPRENTICESHIP' form is active, with tabs for 'Personal Details' (selected) and 'EPA Details'. The form includes a 'Create User' checkbox, a 'ULN' text input field, and fields for 'Title' (a dropdown menu), 'Email', 'Given Name', and 'Phone Number'. Action buttons 'Save', 'Save and Close', 'Save and New', and 'Cancel' are located at the top right of the form.

You can create a user account for apprentices by ticking the box entitled 'Create User'.

A close-up screenshot of the 'ADD APPRENTICESHIP' form. It shows the 'Personal Details' tab selected. The 'Create User' checkbox is visible, along with the 'ULN' text input field. The form is otherwise identical to the previous screenshot.

You now have a 'Username' field and a 'User Groups' field.

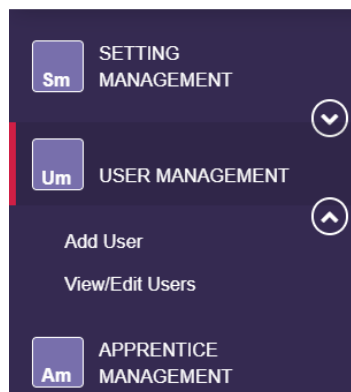
Using the apprentice's email address (ideally their work email) create a username. For 'User Group' field, click 'Apprentice Management'.



Save the apprentice's personal details when all the mandatory fields are completed correctly and the red lines have turned green.

There is an opportunity to add an apprentice as a user if not utilised at this stage. This can be done in the 'Add User' section under the 'User Management' area in the navigation bar.

To add an apprentice as a user, if not previously done, go into the 'Add User' section under the 'User Management' area in the navigation bar.

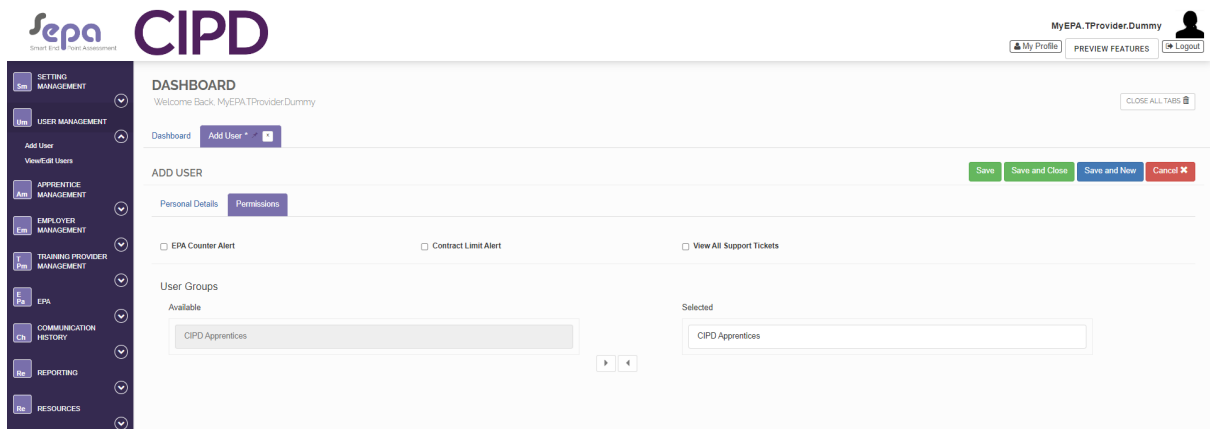
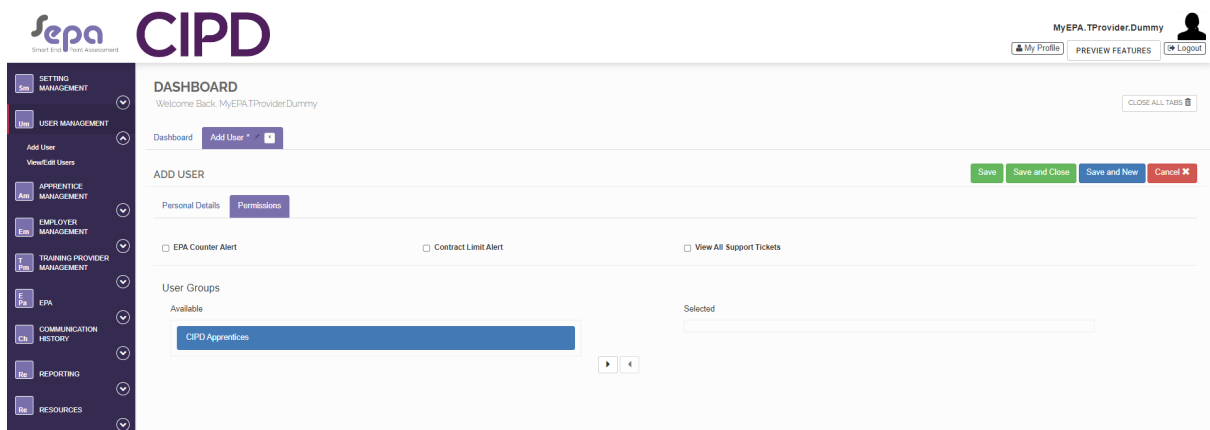


Complete the cells with the red tabs, to identify mandatory fields and then click the 'Is an Apprentice?' button at the bottom of the page.



A dropdown menu will appear where you can select which apprentice the user record relates to.

In the 'Permissions' tab, select the relevant option available to allow the apprentice to access the system and then click the right facing arrow to move the permissions to the 'Selected' column.



Once all cells and permissions have been complete, click the 'Save' button to activate the changes.



## Entering an Apprentice's EPA Details

Select the tab entitled 'EPA details'.

This is where you order CIPD's EPA services for each apprentice you have registered with the ESFA.

Make sure you complete these details early on, ideally **no later than four weeks** after an apprentice has been registered with ESFA.

The ESFA aim to bring in line the records of training providers, EPAOs and the ESFA and require CIPD to share this information with them.

The screenshot shows the SEPA (Smart End Point Assessment) dashboard. The user is logged in as 'SA Admin'. The dashboard includes a navigation menu on the left with categories like 'ASSESSMENT CENTRE MANAGEMENT', 'EMPLOYER MANAGEMENT', 'TRAINING PROVIDER MANAGEMENT', 'EPA', 'COMMUNICATION HISTORY', 'REPORTING', and 'RESOURCES'. The main content area is titled 'DASHBOARD' and 'ADD APPRENTICE'. The 'EPA Details' tab is selected, showing fields for 'Employer' and 'Training Provider/College'. Both fields are currently empty with a dropdown menu and a plus icon. Below these fields are error messages: 'Employer must be specified' and 'Training Provider must be specified'. Other fields include 'Employment Address', 'Training Address', 'Employment Address must be specified', 'Training Address must be specified', 'Standard', 'LARS Code', and 'EPA Start Date (expected)'. There are buttons for 'Save', 'Save and Close', 'Save and New', and 'Cancel'.

Select the correct employer details from the 'Employer' list. Their address should automatically populate in the 'Employment Address' field.

Select your Company name from the 'Training Provider/College' field. Once again the correct address should populate within the 'Training Address' field.

Select the correct apprenticeship Standard. The LARS code will populate automatically. The apprenticeship length will automatically be set to the typical on programme duration given in the assessment plan. You can update this field to reflect the training duration as per the learning plan or training schedule. This must be a minimum of 12 months for all standards. It should not be confused with the dates for the qualification training, if the apprentice is doing a qualification as part of their on-programme training.

The screenshot shows the 'EPA DETAILS' form. At the top, there is a section for 'Apprenticeship Length' with input fields for 'Months' (0) and 'Days' (0). Below this is the 'EPA DETAILS' section. It includes fields for 'Apprenticeship Start Date' (31/08/2022), 'Apprenticeship End Date (expected)' (31/08/2023), 'EPA Start Date (expected)' (31/08/2023), 'Registration Invoice', 'EPA Invoice', 'Line Manager Name', 'Apprentice Coordinator', and 'Has EPA Membership?' (checkbox). There is also a 'REASONABLE ADJUSTMENTS' section with a checkbox 'Are Reasonable Adjustments Required?'. The right side of the form has fields for 'Registration PO Number', 'EPA PO Number', 'Assessor / Tutor Name', 'Line Manager Contact', 'Funding Type' (dropdown menu), and 'EPA Start Date (expected)'. There are buttons for 'Add Apprentice' and 'View/Edit Apprentices' in the left navigation menu.

Select the 'Apprenticeship Start Date' field. This is the date the apprenticeship formally started, it should be the same as the enrolment/registration date you have provided to the ESFA.

The 'Apprenticeship End Date (expected)' – is **the Gateway** date. Make sure you forecast and plan this date according to when the expected on-programme training and all of the requirements of the apprenticeship are complete. All progress check points between the employer and Training Provider should be working towards keeping the apprentice on track for this date. Before entering this date on SEPA make sure it has been planned in diaries and can realistically be achieved. It should not be scheduled around peak trading periods, holiday and significant calendar events. The employer, apprentice and training provider should all be committed to completion on this date.

**All Gateway documents must be uploaded onto SEPA on the 'Apprentice End Date (expected)'**. See Chapter 5 entitled 'The Gateway Checklist' for details on uploading Gateway evidence.

Occasionally there will be circumstances that prevent completion of the on-programme training on this original expected date. For these circumstances a new Apprenticeship End Date/Gateway date must be established and entered within this field. It is essential to keep up-to-date apprenticeship assessment records, so as soon as a change is confirmed the 'Apprenticeship End Date (expected)' field must be updated to reflect the change.

Changes to the 'Apprentice End Date (expected)' field will create automatic adjustments to the 'Apprenticeship Length' field.

The screenshot displays the SEPA CIPD interface. On the left is a navigation menu with categories like 'SETTING MANAGEMENT', 'USER MANAGEMENT', 'APPRENTICESHIP MANAGEMENT', 'EMPLOYER MANAGEMENT', 'TRAINING PROVIDER MANAGEMENT', 'EPA', 'COMMUNICATION HISTORY', 'REPORTING', and 'RESOURCES'. The main content area is titled 'EMPLOYMENT / TRAINING DETAILS' and contains several sections: 'EMPLOYER' (Test Employer, Employment Address: Nefe, 08, Newcastle upon Tyne, NE12 8BT), 'TRAINING PROVIDER/College' (CIPD test provider, Training Address: Nefe, 08, Newcastle upon Tyne, NE12 8BT), 'STANDARD DETAILS' (Standard: HR Consultant / Partner - Level 5 (190 - v1.00)), 'STANDARD INFORMATION' table, 'Apprenticeship Length' (12 Months, 0 Days), and 'EPA DETAILS' (Apprenticeship Start Date: 17/12/2018, EPA Start Date (expected): 17/12/2019, Apprenticeship End Date (expected): 17/12/2019, Registration PO Number).

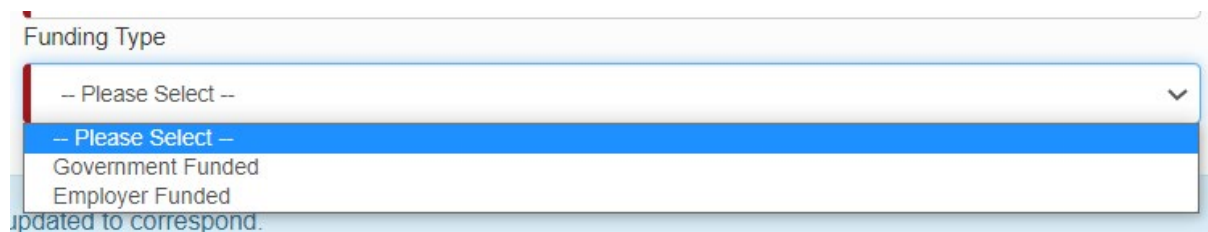
**All Gateway documents must be uploaded onto SEPA on the 'Apprentice End Date (expected)'**. See Chapter 5 entitled 'The Gateway Checklist' for details on uploading Gateway evidence.

Enter the 'EPA Start Date' field. This field should contain the date on which the Apprentice wants to have their assessment. The 'EPA Start Date' should be estimated when the apprentice's record is first created and updated as the apprentice approaches Gateway. This will ensure the assessment is booked on a day that works for the apprentice to attend.

**Note:** The registration invoice, EPA invoice, Registration Purchase Order (PO) number, EPA PO number, Apprentice Coordinator and 'Has EPA membership?' tickbox are all optional fields.

Select and complete 'Line Manager Name' and 'Line Manager Contact'.

On the 'Funding Type' field select the correct option from the dropdown menu.



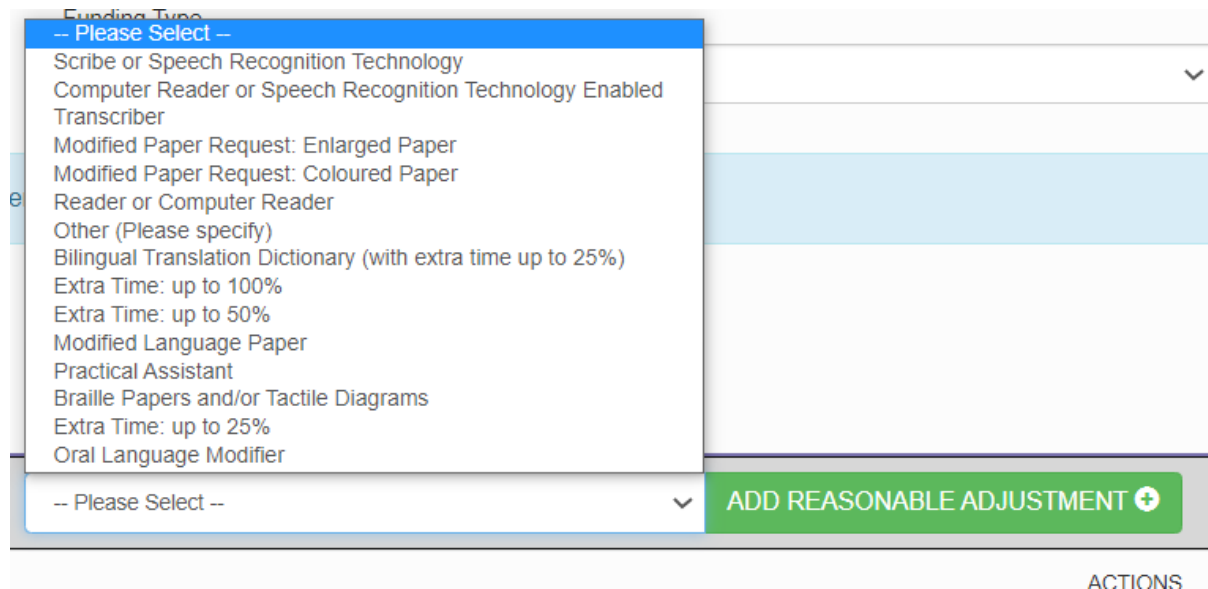
Once all mandatory fields are complete and the line on the left of the box/es is green, click 'Save'.

Apprentice details will now be successfully saved (and the EPA Services are ordered)

Once the apprentice details have been successful saved, three new tabs will appear – 'Documents, Checklist and Bookings/Resits'. These subjects are covered in the following sections.

### Requesting Reasonable Adjustments

If the apprentice requires reasonable adjustments tick the box next to 'Are reasonable Adjustments Required?'. A new box will appear which allows you to select from a list.

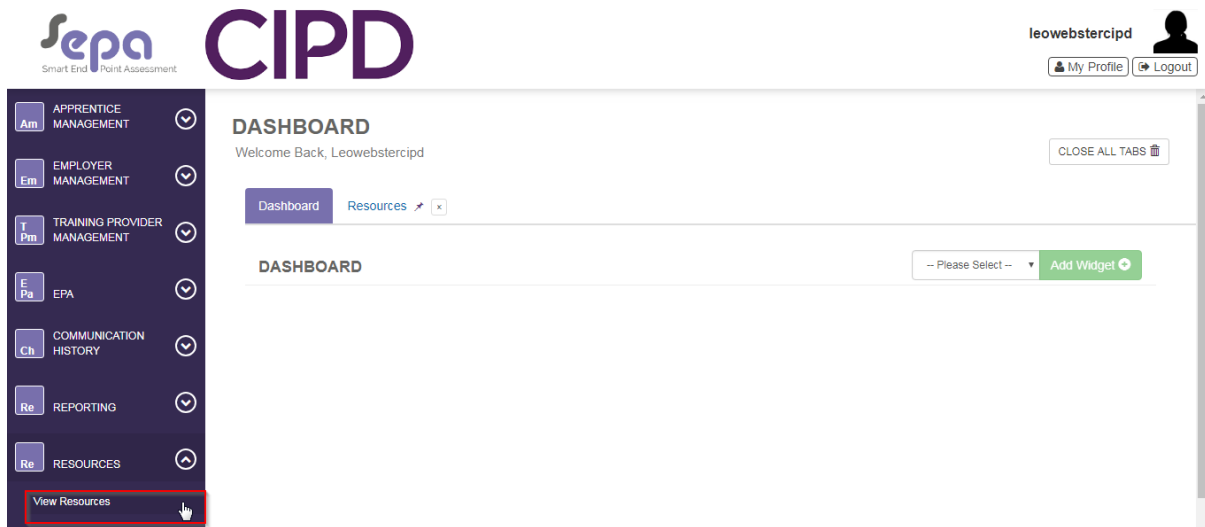


Click the green box to 'Add Resonable Adjustment'. See CIPD reasonable adjustments and special considerations policy (End Point Assessments) for evidence requirements. Click the green box entitled 'Evidence' to upload evidence file/s.

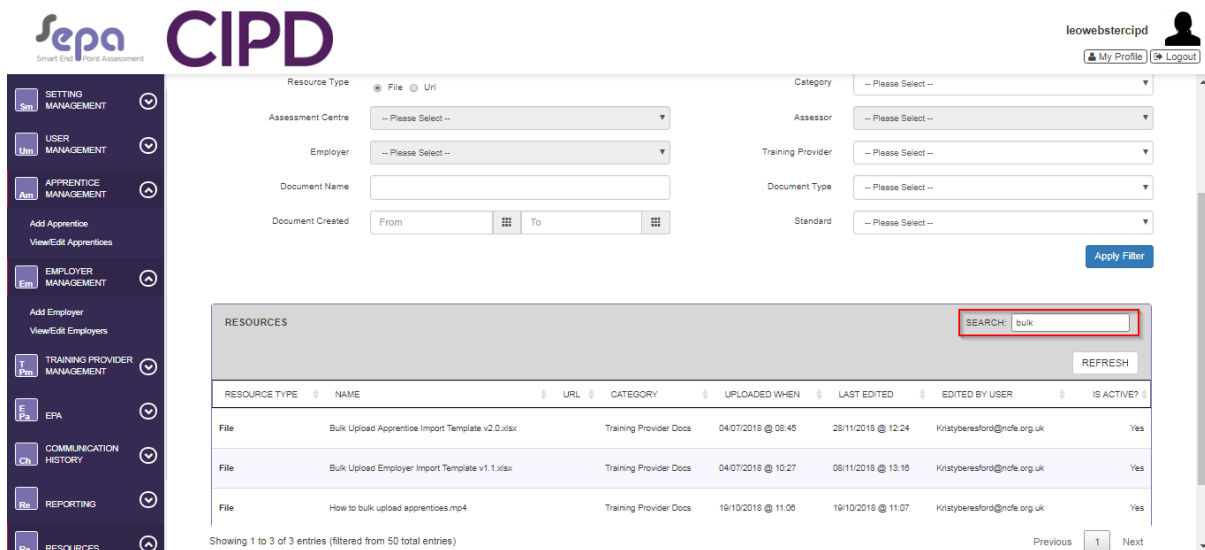
## Bulk Upload Apprentice Details

To bulk upload apprentice details, download the 'Bulk Upload Apprentice Import' template.

This can be found from the Navigation Menu in 'Resources/Vie Resources'.



Type bulk into the search bar the select the 'Bulk Upload Apprentice Import' document.



Select 'Download' and download the 'Bulk Upload Apprentice Import' spreadsheet.

The screenshot shows the SEPA CIPD dashboard. On the left is a navigation menu with options like 'SETTING MANAGEMENT', 'USER MANAGEMENT', 'APPRENTICE MANAGEMENT', 'EMPLOYER MANAGEMENT', 'TRAINING PROVIDER MANAGEMENT', 'EPA', 'COMMUNICATION HISTORY', 'REPORTING', and 'RESOURCES'. The main area is titled 'DASHBOARD' and 'WELCOME BACK, Leowebstercipd'. Below this, there are tabs for 'Dashboard', 'Resources', and 'Edit Resource'. The 'Edit Resource' page shows details for a resource named 'Bulk Upload Apprentices Import Template v2.0.xlsx'. It includes fields for 'Date Created', 'Last Updated', 'Resource Category', 'Standard', and 'Resource Type'. Below these details is a 'Versions' table with columns for 'CURRENT VERSION', 'FILENAME', 'TYPE', 'CREATED', and 'DOCUMENT DATE'. The table shows one version of the file. A red box highlights the 'Download' button in the bottom right corner of the table.

Open the 'Bulk Upload Apprentices Import' spreadsheet and complete all relevant apprentice information.

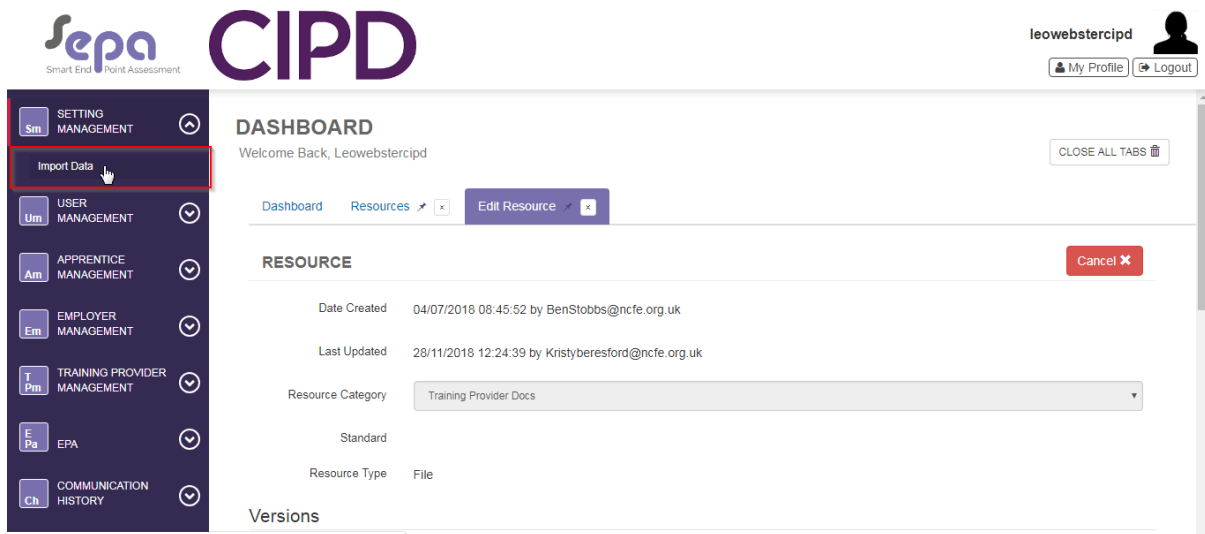
The screenshot shows an Excel spreadsheet titled 'Bulk Upload Apprentices Import - Excel'. The spreadsheet has columns for 'Training Provider UKPRN \*', 'ULN \*', 'Standard Name\*', 'Title \*', 'Forename \*', and 'Surname \*'. The rows are numbered 1 through 9. The first row contains the headers, and the subsequent rows are empty.

	A	B	C	D	E	F
1	Training Provider UKPRN *	ULN *	Standard Name*	Title *	Forename *	Surname *
2						
3						
4						
5						
6						
7						
8						
9						

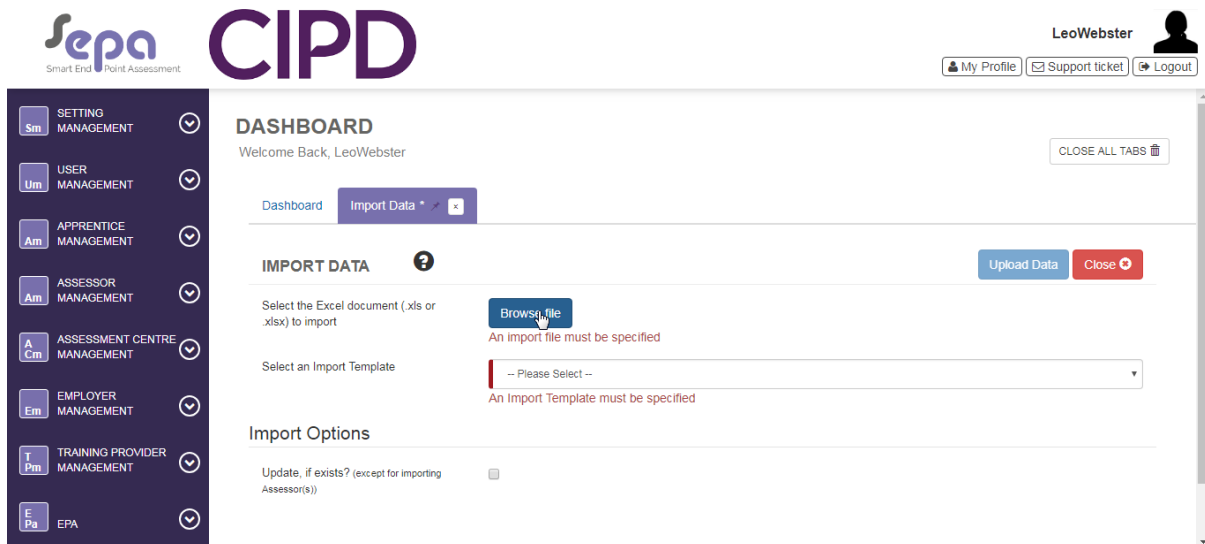
**Note:** The fields on the spreadsheet correspond to the fields in SEPA. They are the same as the fields detailed in the section on adding apprentice details. For clarification on the correct information to enter in specific fields, please refer to this section.

Once completed, save the spreadsheet.

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



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



Select the 'Bulk Upload Apprentice Import' file.



The screenshot shows a web dashboard for LeoWebster. On the left is a dark sidebar with navigation links: Sm (SETTING MANAGEMENT), Um (USER MANAGEMENT), Am (APPRENTICE MANAGEMENT), Am (ASSESSOR MANAGEMENT), A Cm (ASSESSMENT CENTRE MANAGEMENT), Em (EMPLOYER MANAGEMENT), T Pm (TRAINING PROVIDER MANAGEMENT), and E Pa (EPA). The main content area is titled 'DASHBOARD' and 'Welcome Back, LeoWebster'. There are two tabs: 'Dashboard' and 'Import Data'. The 'Import Data' tab is active. Below the tabs, there's a section titled 'IMPORT DATA' with a help icon. It contains a 'Browse file' button, a message 'An import file must be specified', and a dropdown menu for 'Select an Import Template'. The dropdown menu is open, showing options: '-- Please Select --', '-- Please Select --', 'Import Apprentices' (highlighted in blue), and 'Import Employers'. Below this is the 'Import Options' section with a checkbox 'Update, if exists? (except for importing Assessor(s))'. At the top right of the main content area, there are 'Upload Data' and 'Close' buttons. A 'CLOSE ALL TABS' button is also visible at the top right of the dashboard area.

Select 'Upload Data'. The system will now upload all of the requested apprentices to the SEPA platform.

Any apprentices that are not successfully uploaded will be highlighted in a pop up box with details of why the upload was not successful.

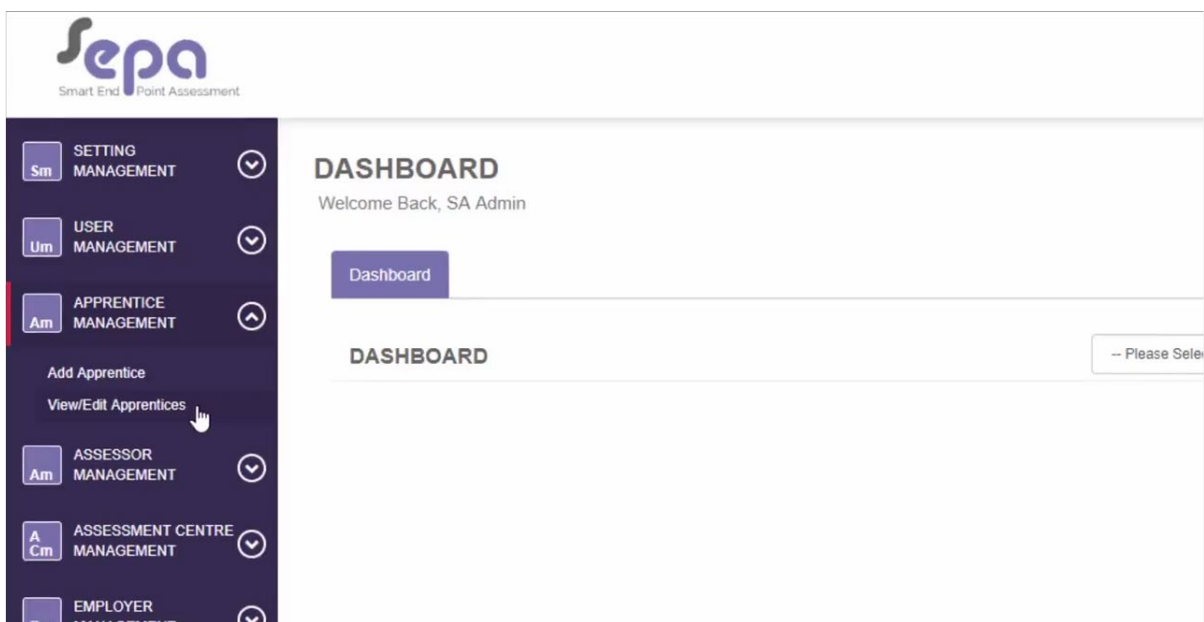
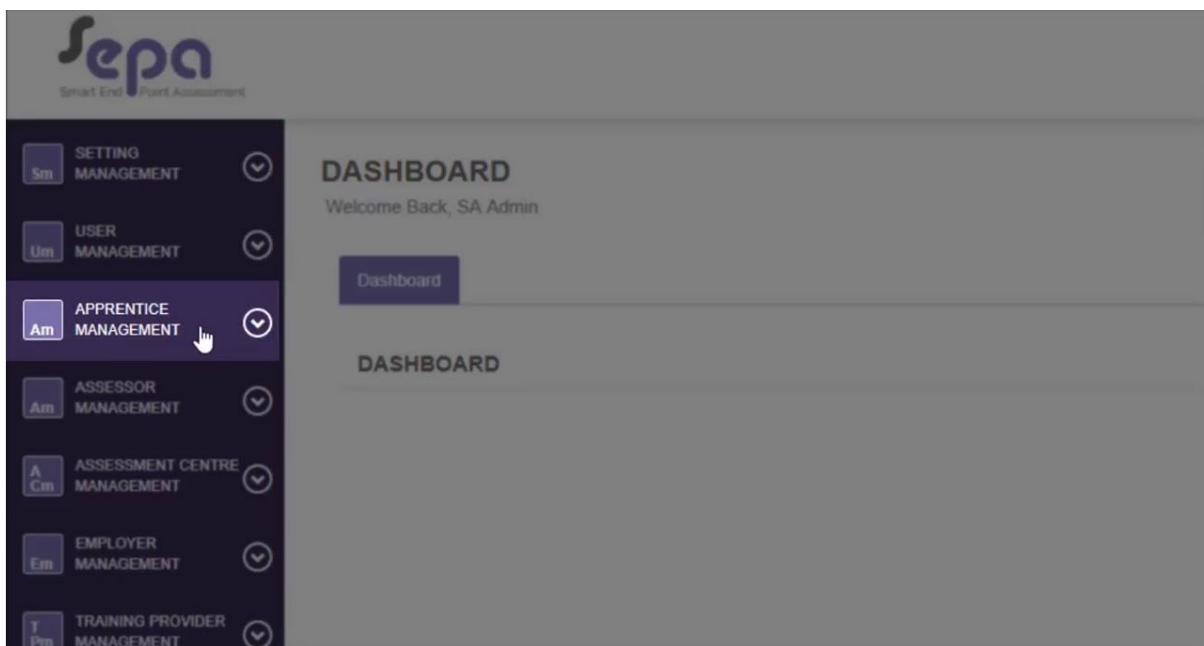
## 5. The Gateway Checklist

This section is completed on the date entered for 'Apprentice End Date' found in 'Add Apprentice/Personal details'.

When the apprentice, Training Provider and employer meet for Gateway, they will review the apprentice's progress, decide whether the apprentice has met all the requirements of the standard and is occupational competent and therefore ready to move on to End Point Assessment. They confirm all the evidence required for 'The Gateway Checklist' is accurate and complete. It is then uploaded to this section within SEPA.

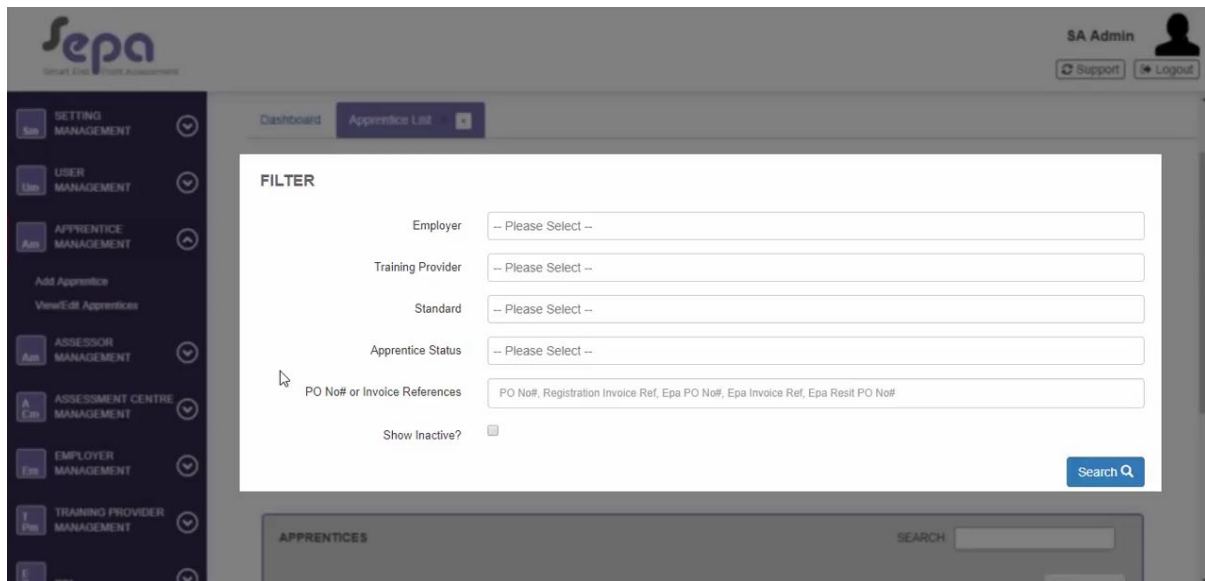
### Uploading Gateway Evidence

From the Navigation Menu select 'Apprentice Management'. Then select 'View/Edit Apprentices'

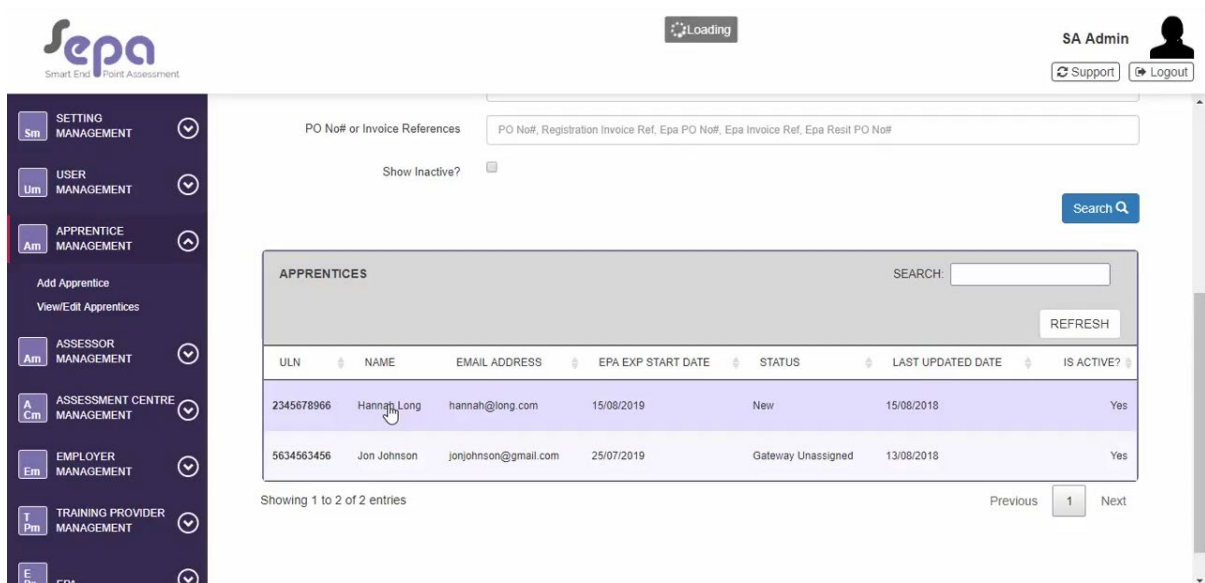




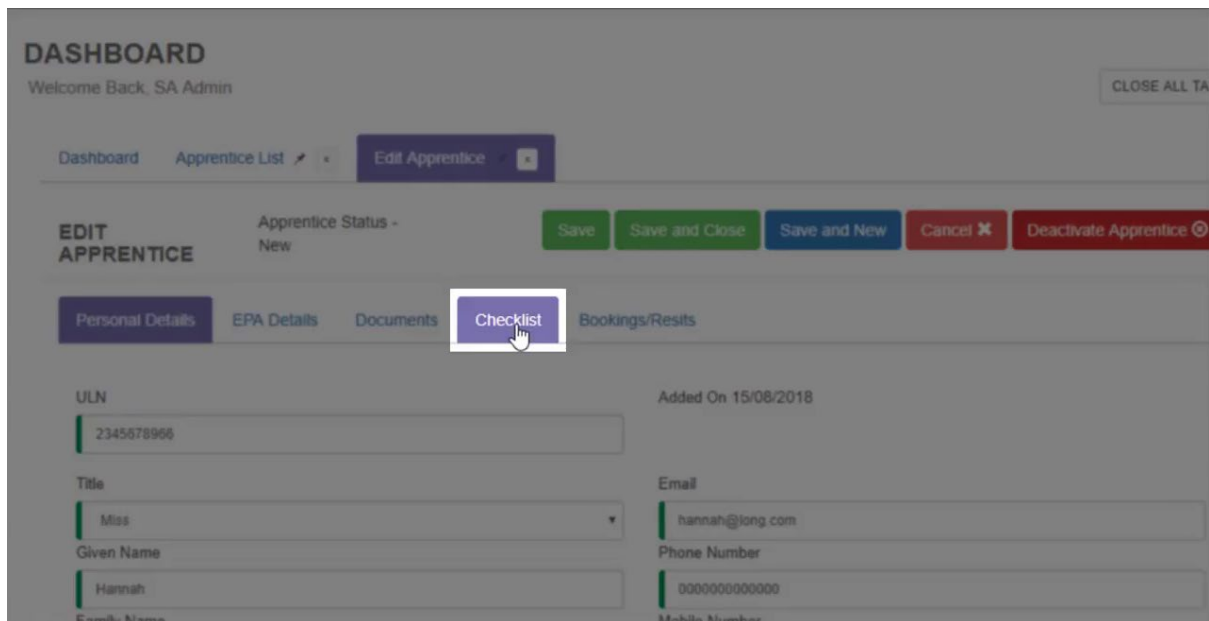
Find your apprentices using the filter at the top of the page and select 'Search'.



Click on the apprentice you would like to view.



Once the apprentice's data has loaded you will be able to update the Gateway evidence by clicking on the 'Checklist' tab.



**Note:** The tab entitled checklist is referred to as ‘the Gateway checklist’ within CIPD’s guidance and resources.

The Gateway evidence must be uploaded no later than the ‘Apprentice End Date (expected)’.

Please ensure that the ‘EPA Start Date (expected)’ is updated, as this is the date for which CIPD will book the apprentice’s assessment. Check with the apprentice they are available at the time and date the assessments are scheduled by the CIPD once booked to avoid rescheduling the assessment.

Please ensure the EPA PO is updated if you use PO numbers for your apprentices as we will need to include this on the invoice.

There are three sections to the ‘Checklist’ tab: ‘Items’, ‘Sign Off’ and ‘Details’.

Checklist

ITEMS

CHECKLIST	CHECKLIST DOCUMENT COUNT - 0
QUESTION	ANSWER
Apprentice has been on the programme for minimum of 1 year	<input type="checkbox"/>
Apprentice has a Level 2 in Maths and English	<input type="checkbox"/>
Apprentice has achieved the relevant knowledge	<input type="checkbox"/>
Consultative Project Scope (add the same document as the Employer declaration here)	<input type="checkbox"/>
Employer declaration form (add the same document as the consultative project scope here)	<input type="checkbox"/>
Apprentice has signed the "CIPD Certificate Claim Authorisation Form"	<input type="checkbox"/>
I confirm that the "EPA Start Date (expected)" listed on the EPA details page for this apprentice is the requested date for the Professional Discussion and this can be accommodated by the apprentice and employer.	<input type="checkbox"/>

SIGN OFF

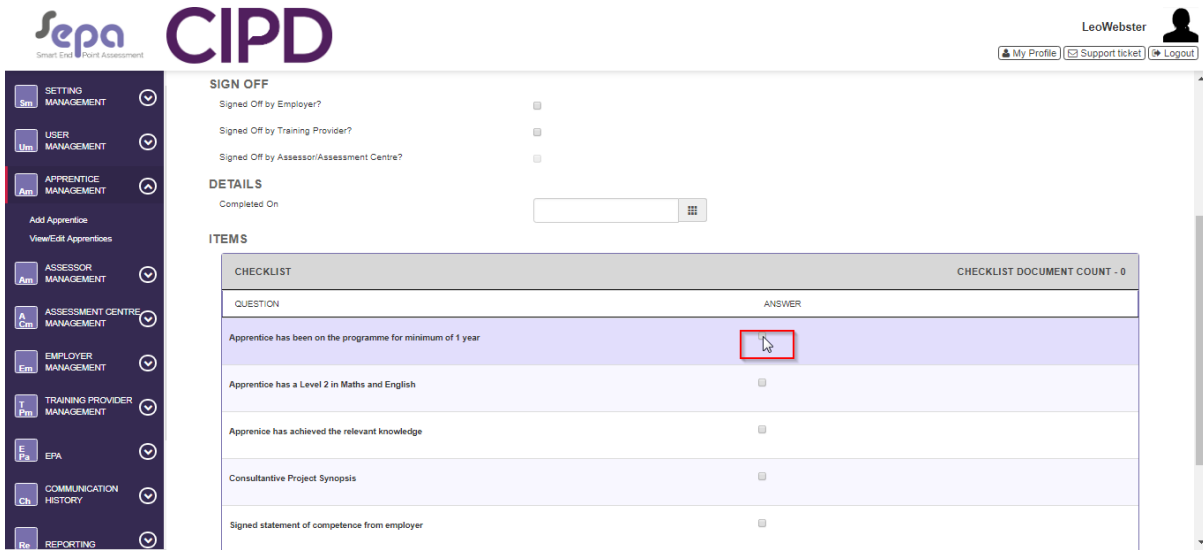
Signed Off by Training Provider?

Signed Off by CIPD?

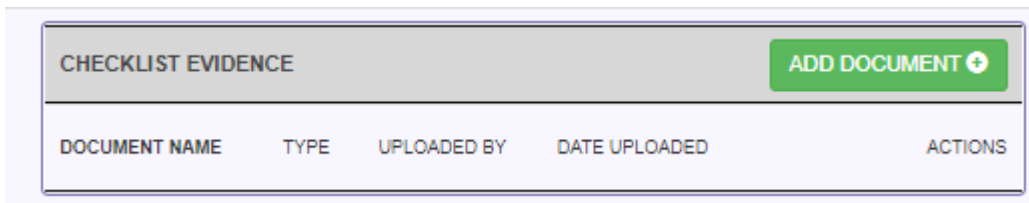
DETAILS

Completed On

In the items section, work through the list and tick each box.

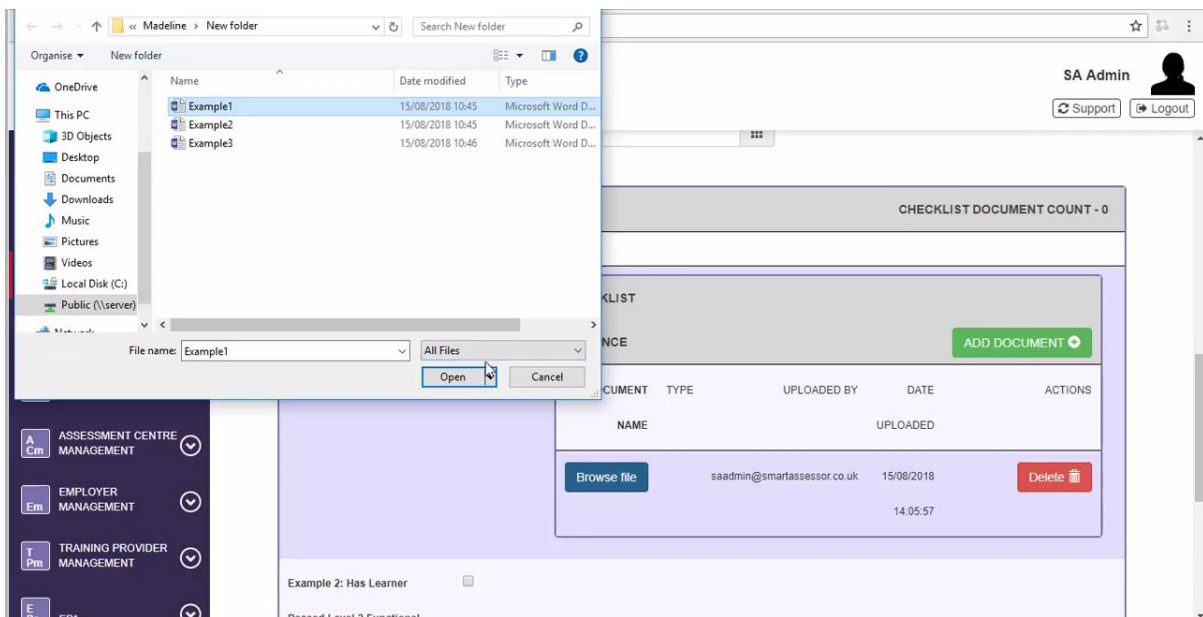


Where evidence is required, an 'Evidence' pop up will be displayed with an option to 'Add Document'.



Click 'Add Document' to upload the appropriate evidence. Please refer to the guidance document.

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



When the evidence has been uploaded and all the checklist fields are complete you must sign off the Gateway Checklist. Go to the section entitled 'Sign Off' and tick and 'Signed Off by Training Provider' prior to submission for Gateway.

Select 'Save' to update the Apprentice's record.

CIPD will complete the signing off process by ticking the 'Signed off by CIPD'.

The 'Details/Completed On' field will be completed once the gateway checklist has been formally signed off by CIPD

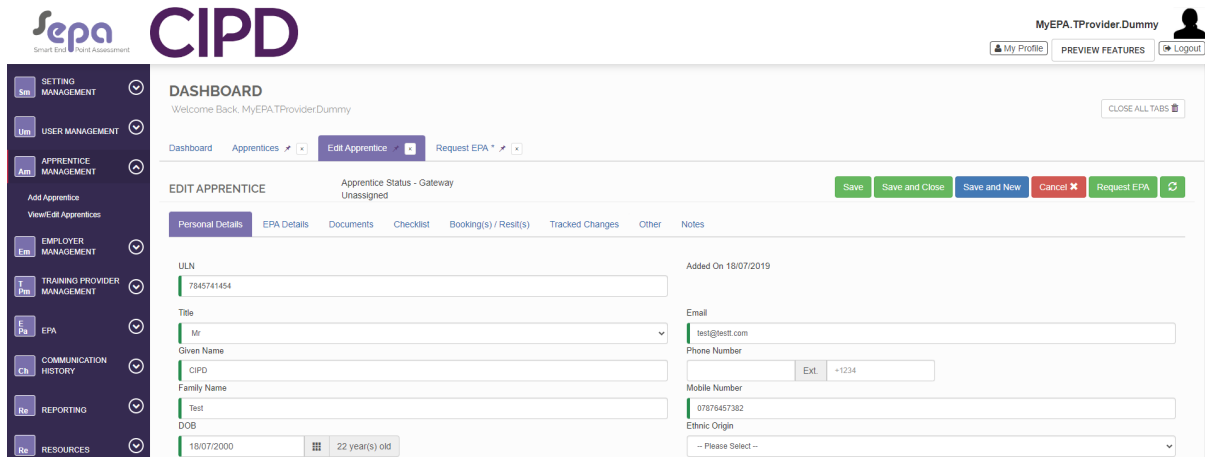


The screenshot shows a form with two main sections: 'SIGN OFF' and 'DETAILS'. Under 'SIGN OFF', there are two rows, each with a label and a checkbox. The first row is 'Signed Off by Training Provider?' with an unchecked checkbox. The second row is 'Signed Off by CIPD?' with an unchecked checkbox. Under 'DETAILS', there is a label 'Completed On' followed by a text input field and a small grid icon button.

**Note:** Once sign off has been completed by the Training Provider, you must also Request EPA for the apprentice. CIPD will complete the sign off once 'Request for EPA' has been completed.

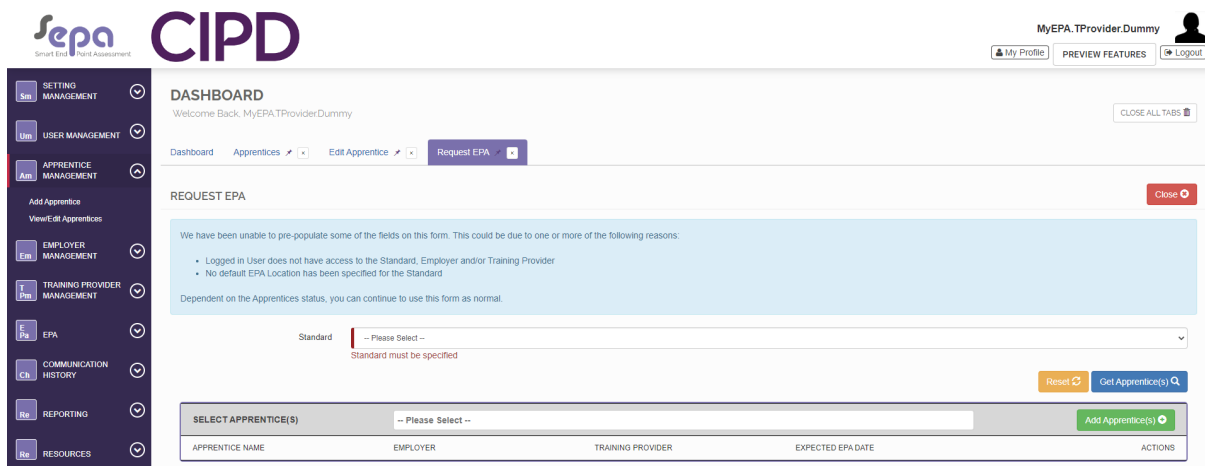
## 6. Requesting EPA

EPA must be requested at the same time the Gateway Checklist is submitted. Once the apprentices record is saved with a completed gateway checklist, a 'Request EPA' option will be displayed.



The screenshot shows the 'EDIT APPRENTICE' page in the CIPD system. The user is logged in as 'MyEPA.TPProvider.Dummy'. The page has a sidebar with navigation options like 'SETTING MANAGEMENT', 'USER MANAGEMENT', 'APPRENTICE MANAGEMENT', etc. The main content area is titled 'EDIT APPRENTICE' and shows the 'Apprentice Status - Gateway Unassigned'. There are several tabs: 'Personal Details', 'EPA Details', 'Documents', 'Checklist', 'Booking(s) / Result(s)', 'Tracked Changes', 'Other', and 'Notes'. The 'Personal Details' tab is active, showing fields for ULN, Title, Given Name, CIPD, Family Name, DOB, Email, Phone Number, Mobile Number, and Ethnic Origin. A 'Request EPA' button is visible in the top right corner of the form area.

When the 'Request EPA' page has loaded, click on the drop down list on the field entitled 'Standard'.



The screenshot shows the 'REQUEST EPA' page. A message box states: "We have been unable to pre-populate some of the fields on this form. This could be due to one or more of the following reasons: • Logged in User does not have access to the Standard, Employer and/or Training Provider • No default EPA Location has been specified for the Standard. Dependent on the Apprentices status, you can continue to use this form as normal." Below the message, there is a 'Standard' dropdown menu with the text "-- Please Select --" and a red error message "standard must be specified". There is also a 'Get Apprentice(s)' button and a 'Reset' button. At the bottom, there is a table with columns: 'APPRENTICE NAME', 'EMPLOYER', 'TRAINING PROVIDER', 'EXPECTED EPA DATE', and 'ACTIONS'. The table currently has one row with the value "-- Please Select --" in the 'APPRENTICE NAME' column.

Select the correct apprentice's Standard from the 'Standard' drop down list.

**SEPA CIPD** MyEPA.TPProvider.Dummy

**DASHBOARD**  
Welcome Back, MyEPA.TPProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

We have been unable to pre-populate some of the fields on this form. This could be due to one or more of the following reasons:

- Logged in User does not have access to the Standard, Employer and/or Training Provider
- No default EPA Location has been specified for the Standard

Dependent on the Apprentices status, you can continue to use this form as normal.

Standard: -- Please Select --

EPA Location: -- Please Select --

SELECT APPRENTICE(S)

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS

Even though the standards CIPD assesses are conducted by remote assessment. Select the appropriate location from the drop down list for 'EPA Location'; the EPA location will always remain as 'Remote' regardless if the discussion is taking place at work, home or training provider location..

**SEPA CIPD** MyEPA.TPProvider.Dummy

**DASHBOARD**  
Welcome Back, MyEPA.TPProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

Standard: HR Support - Level 3 (191 - v1.00)

EPA Location: -- Please Select --

SELECT APPRENTICE(S)

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS

Select the correct details from the options available. For example, if 'Apprentice Work Place' was selected – choose 'Employer' from the drop down list.

**SEPA CIPD** MyEPA.TPProvider.Dummy

**DASHBOARD**  
Welcome Back, MyEPA.TPProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

Standard: HR Support - Level 3 (191 - v1.00)

EPA Location: Apprentice's Work Place

Employer: -- Please Select --

Employer Address: -- Please Select --

SELECT APPRENTICE(S)

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS

Now select the appropriate address from the 'Address' drop down list.

The screenshot shows the SEPA CIPD dashboard. The user is logged in as 'MyEPA.TProvider.Dummy'. The main content area is titled 'REQUEST EPA' and contains several dropdown menus for 'Standard', 'EPA Location', 'Employer', and 'Employer Address'. The 'Employer Address' dropdown is currently open, displaying two address options. Below the form is a table with columns for 'APPRENTICE NAME', 'EMPLOYER', 'TRAINING PROVIDER', 'EXPECTED EPA DATE', and 'ACTIONS'. A 'SELECT APPRENTICE(S)' dropdown is set to '-- Please Select --'. A blue button labeled 'Get Apprentice(s)' is visible next to the dropdown.

Next go to 'Select Apprentice(s)' and click the blue box entitled 'Get Apprentice(s)'.

This screenshot is identical to the one above, showing the 'REQUEST EPA' form with the 'Employer Address' dropdown menu open. The 'Get Apprentice(s)' button is highlighted in blue, indicating the next step in the process.

If apprentices are available with the applied drop down criteria a blue banner will appear with the message 'Apprentice List Updated'.

If the message does not appear, recheck your drop down options and try again.

**sepa CIPD** Smart End Point Assessment

MyEPA.TProvider.Dummy

My Profile PREVIEW FEATURES Logout

**DASHBOARD**  
Welcome Back: MyEPA.TProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

Apprentice list updated

Standard: HR Support - Level 3 (191 - v1.00)

EPA Location: Apprentice's Work Place

Employer: Test Employer

Employer Address: Nctc, OS, 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
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Now click 'Please Select' within the 'Select Apprentice' and select the apprentice.

**sepa CIPD** Smart End Point Assessment

MyEPA.TProvider.Dummy

My Profile PREVIEW FEATURES Logout

**DASHBOARD**  
Welcome Back: MyEPA.TProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

Standard: HR Support - Level 3 (191 - v1.00)

EPA Location: Apprentice's Work Place

Employer: Test Employer

Employer Address: Nctc, OS, Newcastle upon Tyne, NE12 8BT

Reset Get Apprentice(s)

SELECT APPRENTICE(S) CIPD Test Add Apprentice(s)

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
-----------------	----------	-------------------	-------------------	---------

More than one apprentice can be requested.

Once the apprentices who are requesting EPA have been chosen, select 'Add Apprentice(s)'.

**sepa CIPD** Smart End Point Assessment

MyEPA.TProvider.Dummy

My Profile PREVIEW FEATURES Logout

**DASHBOARD**  
Welcome Back: MyEPA.TProvider.Dummy

Dashboard Apprentices Edit Apprentice Request EPA

**REQUEST EPA**

Standard: HR Support - Level 3 (191 - v1.00)

EPA Location: Apprentice's Work Place

Employer: Test Employer

Employer Address: Nctc, OS, Newcastle upon Tyne, NE12 8BT

Reset Get Apprentice(s)

SELECT APPRENTICE(S) CIPD TEST Add Apprentice(s)

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
-----------------	----------	-------------------	-------------------	---------



These apprentices now show within the 'Select Apprentices' section on the screen. You should see the 'Apprentice Name', 'Employer', 'Training Provider' and 'Expected EPA Date'.

If the details are correct, select 'Match Assessor'.

The screenshot shows the 'REQUEST EPA' form with the following details:

- Standard: HR Support - Level 3 (191 - v1.00)
- EPA Location: Apprentices Work Place
- Employer: Test Employer
- Employer Address: Nctc, 05, Newcastle upon Tyne, NE12 8BT

Below the form is a table with the following data:

APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
CIPD Test (7845741454)	Test Employer	CIPD test provider	18/07/2020	Remove

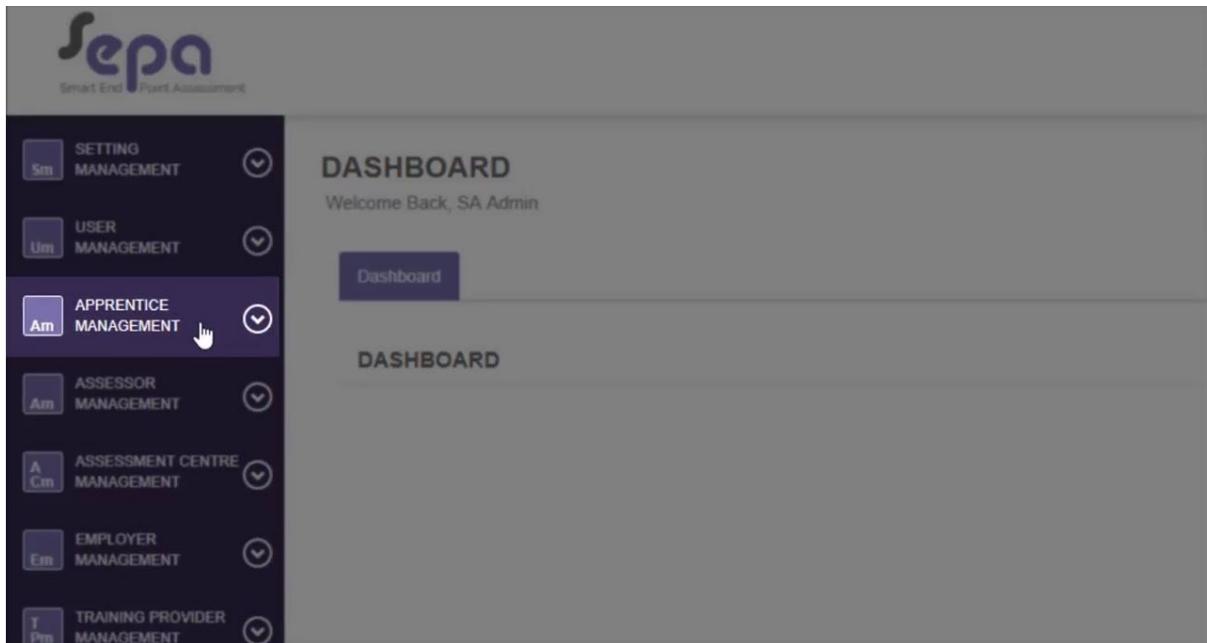
When all apprentices have been matched with an assessor, a message within a green banner will show the following message: "We have successfully allocated Assessor(s) to your Apprentice(s)". This will happen instantly.

The screenshot shows a green banner with the message: "We have successfully allocated Assessor(s) to all your Apprentice(s)".

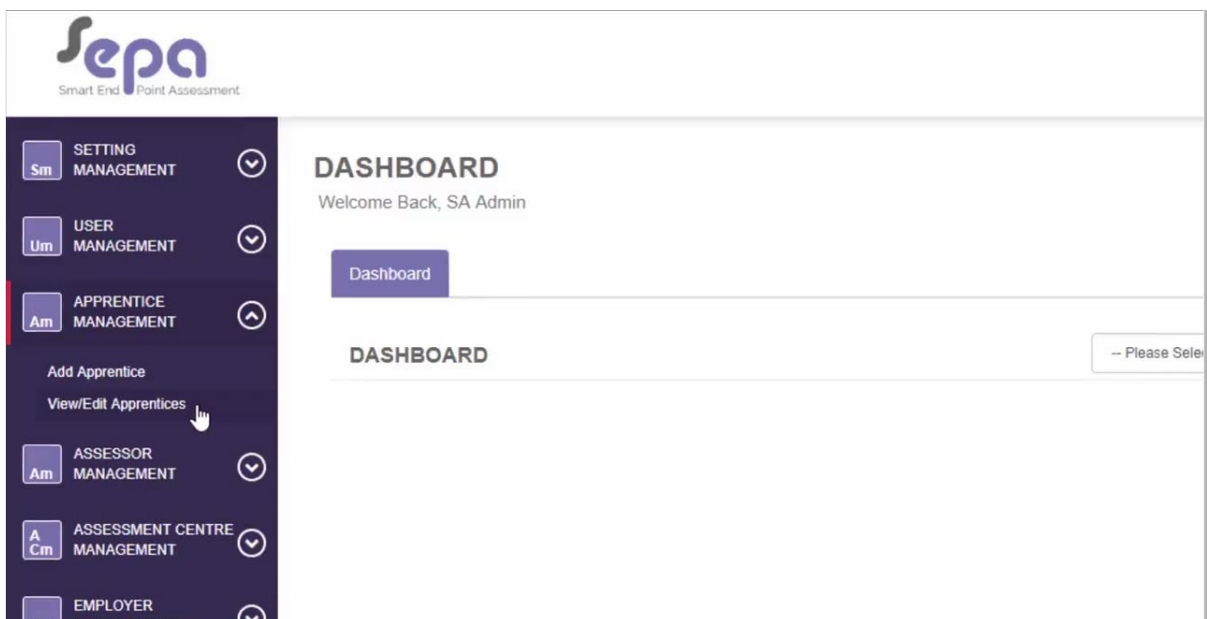
The request EPA process is now complete.

## 7. Uploading the EPA Evidence

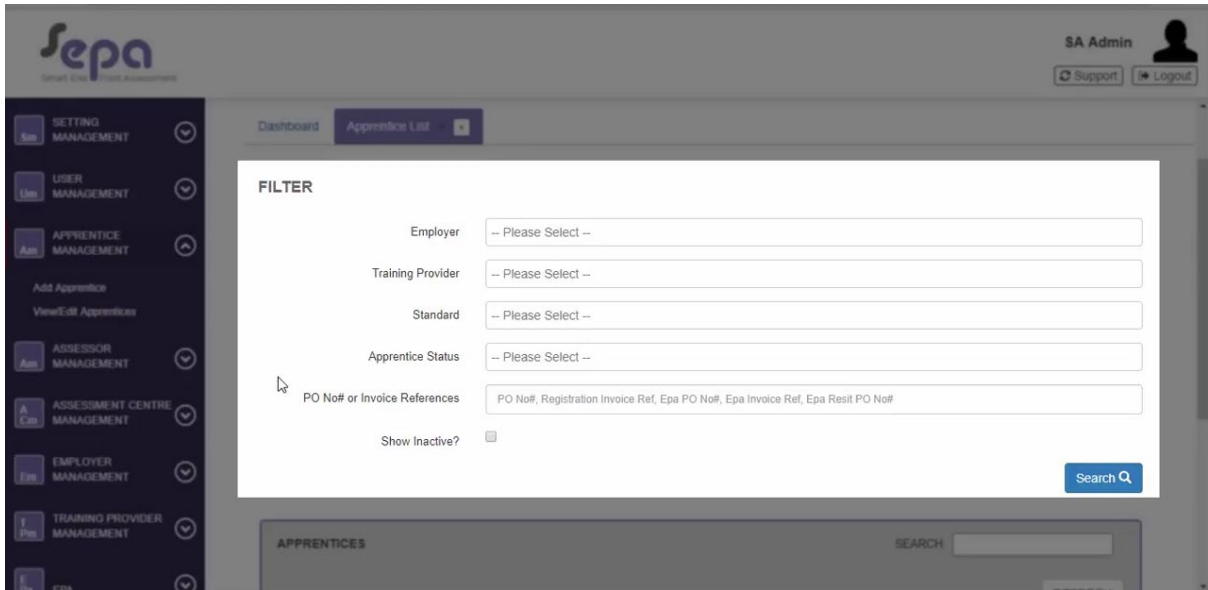
From the Navigation Menu select 'Apprentice Management'.



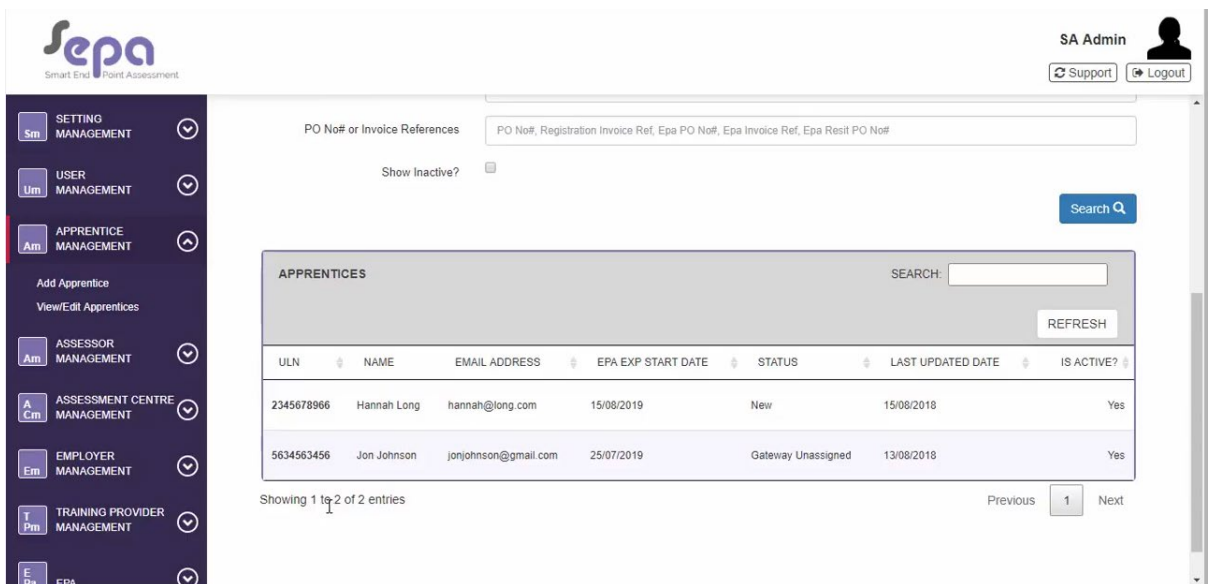
Select 'View/Edit Apprentices'.



Your apprentices will be displayed on the page. If you have a large number of apprentices you may filter the list using the filter at the tip of the page. Once you've applied the filters, select 'Search'.



The lower portion of the page will show all apprentices within the parameters of the applied filter.



Click on the apprentice who's evidence is to be uploaded.

Apprentice Status: -- Please Select --

SEARCH: [ ] REFRESH

ULN	FORENAME	SURNAME	EMAIL ADDRESS	EPA START DATE (EXPECTED)	STATUS	IS ACTIVE?
7667766787	ap	aa	asa@sa.com	22/02/2019	New	Yes
0101010111	tester	Adam	ap@sa.com	26/02/2019	Pending Confirmation	Yes
4982980421	Look	Alike	ap@sa.com	02/03/2019	New	Yes
7876767776	asas	asas	sasa@saa.com	22/02/2019	New	Yes
3253524203	aadam	asas	sfsa@asas.com	22/02/2018	Gateway Unassigned	Yes
2345676542	asd	asd	asd@asd.asd	02/03/2019	New	Yes
6543234567	asd	asd	asd@asd.asd	02/03/2019	New	Yes

Once the document is loaded on the system, select the 'Document' tab within the 'Edit Apprentice'.

**DASHBOARD**  
Welcome Back, Adam Pittbury

Dashboard | Apprentice List | **Edit Apprentice**

Apprentice Status - New

**EDIT APPRENTICE**

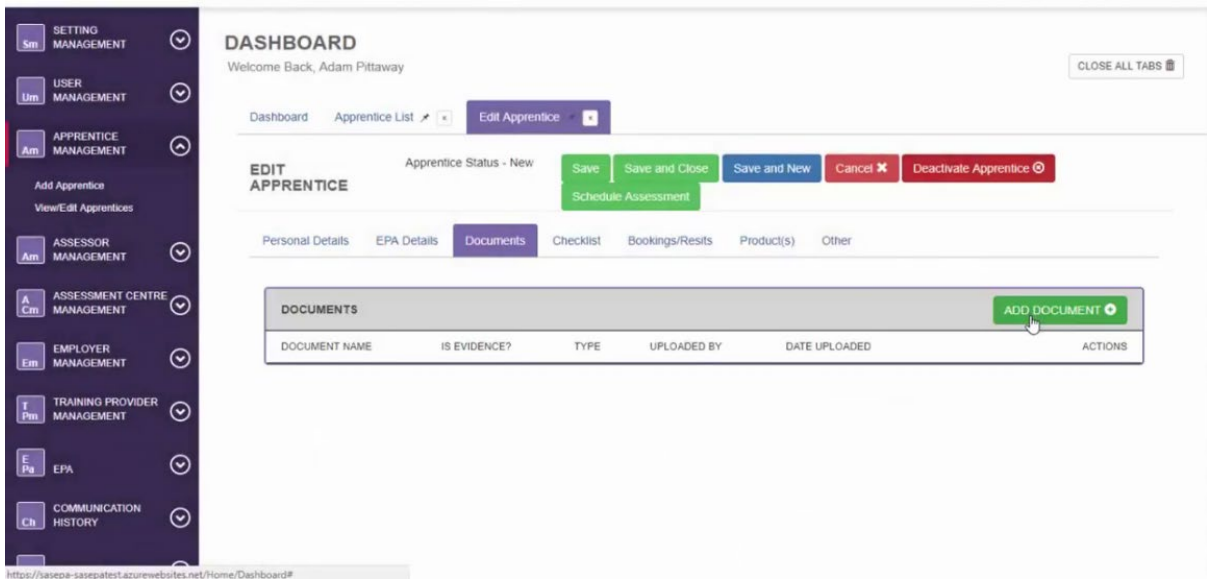
Personal Details | EPA Details | **Documents** | Checklist | Bookings/Events | Progress | Other

ULN: 7876767776  
Title: Mr  
Forename: asas  
Surname: asas  
DOB: 22/02/2019  
Gender: Male

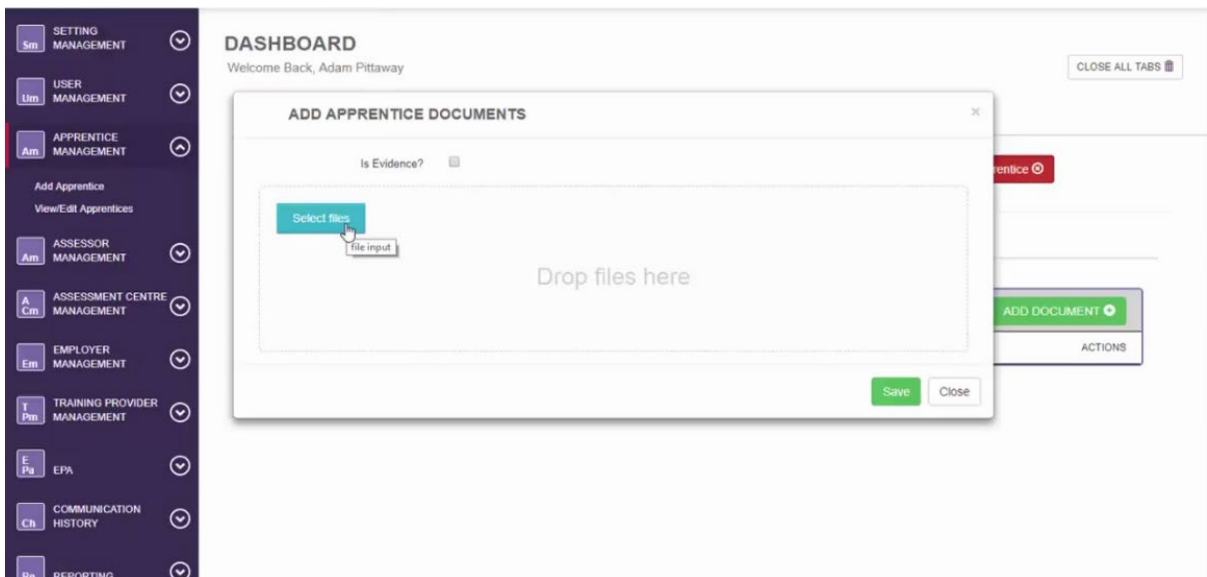
Added On: 22/02/2019

Email Address: asas@sa.com  
Landline Number: 1101010111  
Mobile Number: [ ]  
Ethnic Origin: [ ]  
NI Number: [ ]

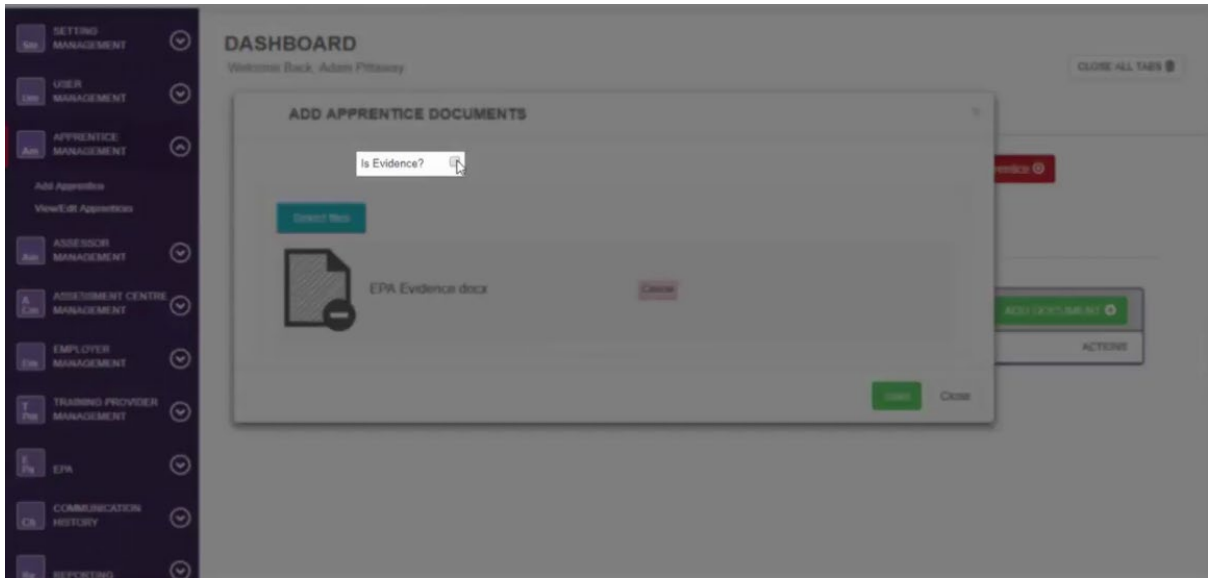
Select 'Add Document'.



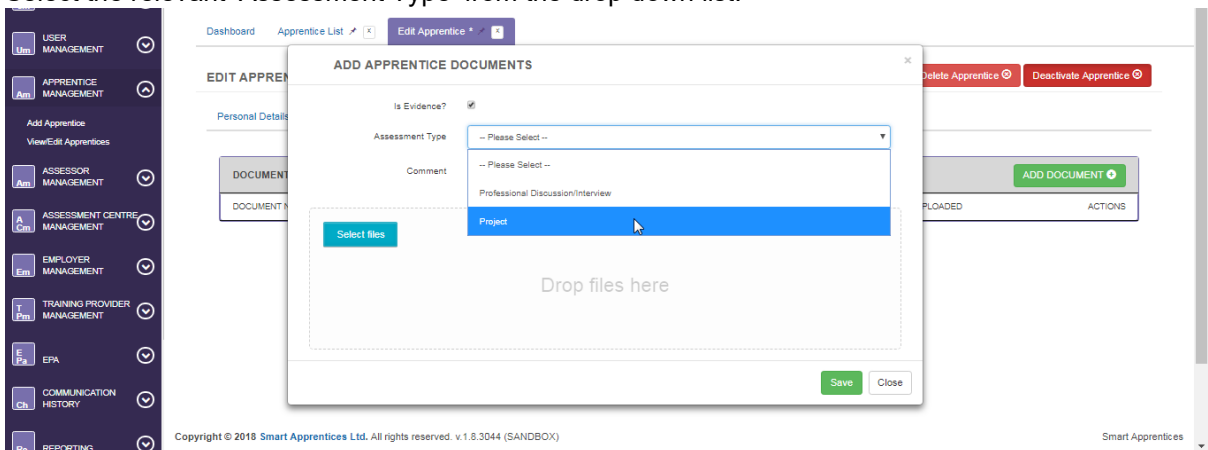
To upload the evidence either drag and drop files from your computer into the box or use the 'Select Files' button.



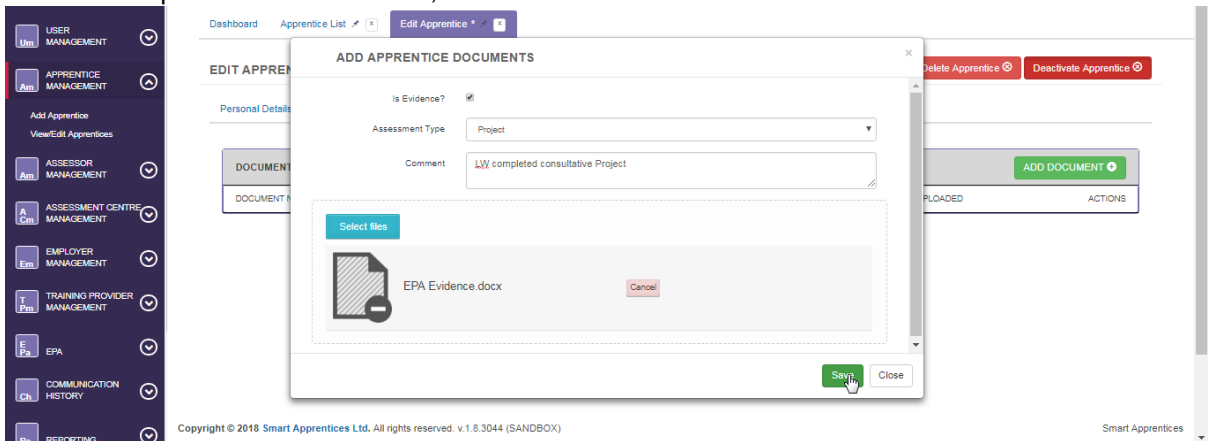
Once uploaded, tick the box entitled 'Is Evidence?'



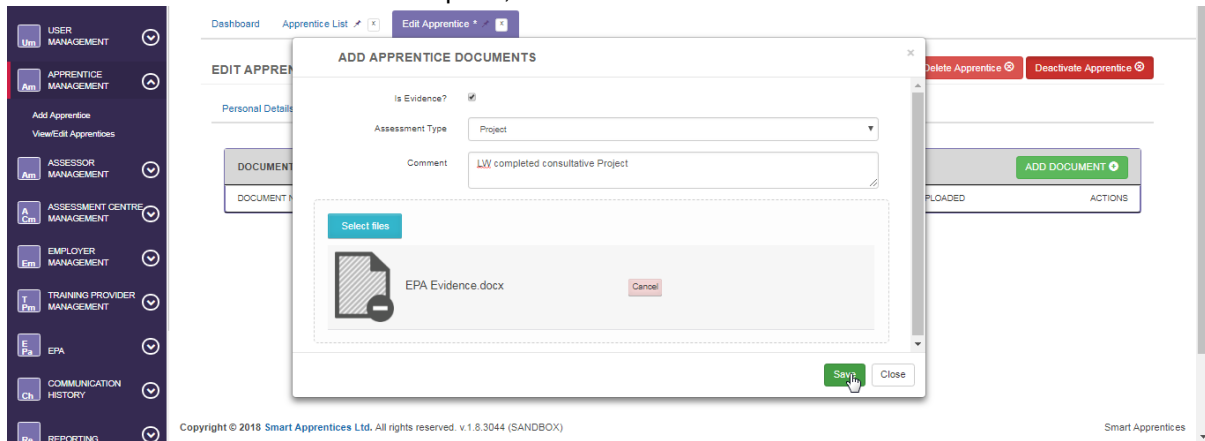
Select the relevant 'Assessment Type' from the drop down list.



There is an option to add comments, in the text box entitled 'Comment'.

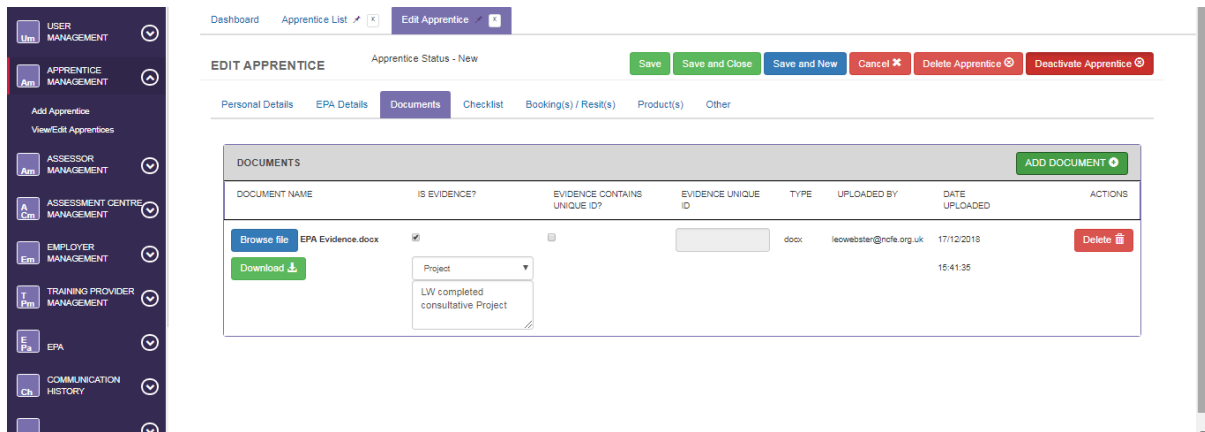


Once all files and comments are complete, select 'Save'.



The EPA evidence is now be available for the assessor.

**Note:** Make sure the EPA evidence is uploaded in time on the assessment date. Late submissions will be graded as fail and cancellation charges will be applied.



Uploaded projects will display as above. They will be stamped with the identity of the uploaded as well as the submission date and time.

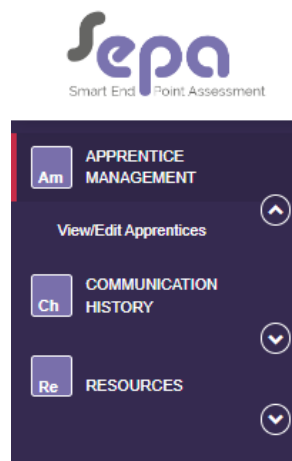
## 8. Accessing Results

EPA results are shared 2-3 weeks following completion of the last assessment. Once feedback has been logged on the Smart EPA system this will generate an email that goes to the apprentice, Training Provider and apprentice's organisation.

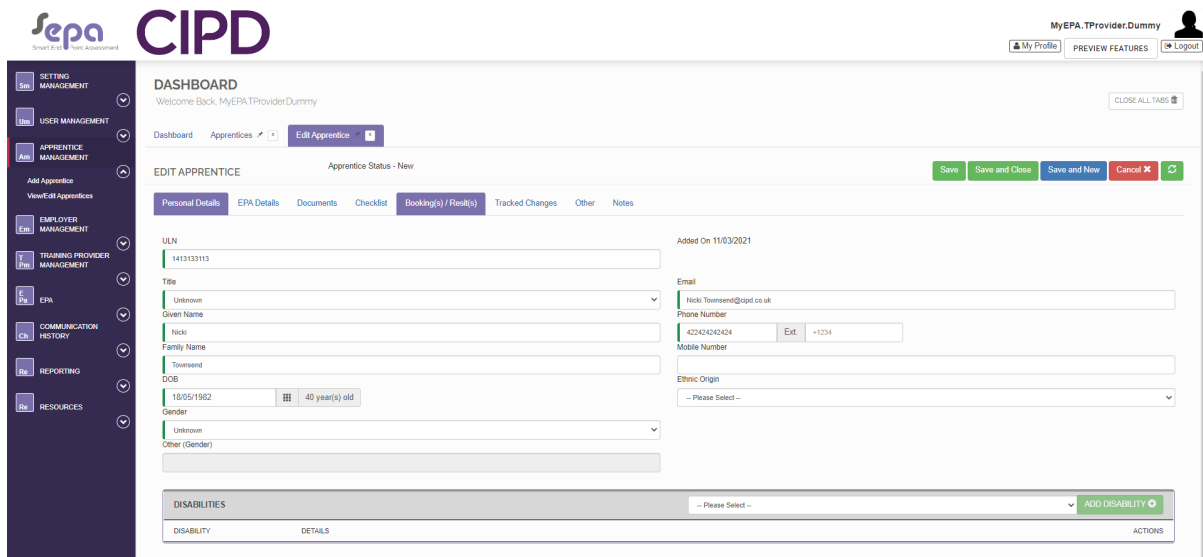
The email details the result given and information regarding certification.

### As an Apprentice

To view the EPA results first click 'View/Edit Apprentices' from under the 'Apprentice Management' option in the navigation bar.



Once in your area, a number of tabs will show and to view results you can click the 'Booking(s)/Resit(s)' tab.



At the bottom of the tab the overall grade issued and 'Date Cert Awarded' will show.



The screenshot shows the 'EDIT APPRENTICE' page in the CIPD system. The 'Booking(s) / Result(s)' tab is active, displaying a table with the following data:

ASSESSMENT TYPE	SCHEDULED FOR	STATUS	MODERATION STATUS	ASSESSOR / ASSESSMENT CENTRE	PO NO #	INVOICE NO #	ACTIONS
Professional Discussion	Day 1 - 12/05/2020 13:00 until 12/05/2020 14:15	Completed		Kay Williams	N/A	N/A	Info

Below the table, the 'Overall Grade' is set to 'Pass' and the 'Date Cert Awarded' is '07/09/2022'.

To see the feedback provided, this is saved in the 'Documents' tab.

The feedback will show as a document with the name 'Feedback' in the title as the most recent document uploaded

The screenshot shows the 'EDIT APPRENTICE' page with the 'Documents' tab selected. The page displays a table titled 'Documents for Samuel Marney' with the following data:

Document name	Evidence details	Uploaded
Samuel Marney_L3 LD Successful Feedback.pdf	MARK AS EVIDENCE	2 months ago

## As a Training Provider

To view the EPA results of your apprentice first click 'View/Edit Apprentices' from under the 'Apprentice Management' option in the navigation bar.

The screenshot shows the navigation bar with the 'APPRENTICE MANAGEMENT' menu expanded. The options are:

- Sm SETTING MANAGEMENT
- Um USER MANAGEMENT
- Am APPRENTICE MANAGEMENT
  - Add Apprentice
  - View/Edit Apprentices

You can then scroll or search for the apprentice's results you are looking for. You can search by using the 'Name' field and then clicking the blue 'Search' button

The screenshot shows the CIPD dashboard with a sidebar on the left containing navigation options: SETTING MANAGEMENT, USER MANAGEMENT, APPRENTICE MANAGEMENT, EMPLOYER MANAGEMENT, TRAINING PROVIDER MANAGEMENT, EPA, COMMUNICATION HISTORY, REPORTING, and RESOURCES. The main content area is titled 'DASHBOARD' and 'Apprentices'. A 'FILTER' section contains several input fields: Name, Employer, Training Provider (set to 'CIPD test provider'), Matched Assessor, Standard, Apprentice Status, PO Notif or Invoice References, Custom Field Value, and Expected EPA Start Date (with 'Between' and 'and' dropdowns). A 'Show Inactive?' checkbox is at the bottom. A 'Search' button is on the right. Below the filter is a table header for 'APPRENTICES' with a search bar and a 'REFRESH' button.

Once you have searched, the page will refresh and show the apprentice you're looking for. You can click their name which will open up the apprentice's information.

This screenshot shows the same dashboard after a search. The 'APPRENTICES' table is populated with one entry. The table has columns: ULIN, NAME, EMAIL ADDRESS, EPA EXP START DATE, GATEWAY ACCEPTANCE DATE, NO. OF DAY'S IN ASSESSMENT, STATUS, LAST UPDATED DATE, IS ACTIVE?, OVERALL ASSESSMENT GRADE, CERTIFIED ON DATE, and PROGRESS. The entry for 'Nolan Toomer' is highlighted. Below the table, it says 'Showing 1 to 1 of 1 entries'. On the right side of the table, there are three tabs: 'Onsite', 'Consultative Project', and 'Professional Discussion'. The 'Onsite' tab is selected. A 'Previous' button and a 'Next' button are at the bottom right.

ULIN	NAME	EMAIL ADDRESS	EPA EXP START DATE	GATEWAY ACCEPTANCE DATE	NO. OF DAY'S IN ASSESSMENT	STATUS	LAST UPDATED DATE	IS ACTIVE?	OVERALL ASSESSMENT GRADE	CERTIFIED ON DATE	PROGRESS
141012010	Nolan Toomer	Nolan.Toomer@cipd.co.uk	11/03/2022			New	11/03/2021	Yes			Onsite

Once in the apprentice's area, a number of tabs will show and to view results you can click the 'Booking(s)/Resit(s)' tab.

**sepa CIPD** MyEPA.TProvider.Dummy

**DASHBOARD** Welcome Back: MyEPA.TProvider.Dummy

Dashboard Apprentices Edit Apprentice

**EDIT APPRENTICE** Apprentice Status - New

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

ULN: 141313313 Added On: 11/03/2021

Title: Unknown

Email: Nicki.Townsend@cpd.co.uk

Phone Number: 4224242424 Ext: +1234

Mobile Number: [Field]

Nick: Townsend

Family Name: [Field]

Townsend

DOB: 18/05/1982 40 year(s) old

Gender: Unknown

Ethnic Origin: -- Please Select --

DISABILITIES: -- Please Select -- **ADD DISABILITY**

DISABILITY DETAILS ACTIONS

At the bottom of the tab the overall grade issued and 'Date Cert Awarded' will show.

**sepa CIPD** victoria.hilton

**DASHBOARD** Welcome Back: Victoria.Hilton

Dashboard Apprentices Edit Apprentice

**EDIT APPRENTICE** Apprentice Status - New

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

**BOOKING(S) / RESULT(S)**

ASSESSMENT TYPE	SCHEDULED FOR	STATUS	MODERATION STATUS	ASSESSOR / ASSESSMENT CENTRE	PO NO #	INVOICE NO #	ACTIONS
Professional Discussion	Day 1 - 12/05/2020 13:00 until 12/05/2020 14:15	Cancelled		Kay Williams	N/A	N/A	Info

Overall Grade: Pass **Recalculate**

Date Cert Awarded: 07/09/2022

To see the feedback provided, this is saved in the 'Documents' tab.

The feedback will show as a document with the name 'Feedback' in the title as the most recent document uploaded

**sepa CIPD** victoria.hilton

**DASHBOARD** Welcome Back: Victoria.Hilton

Dashboard Apprentices Edit Apprentice

**EDIT APPRENTICE** Apprentice Status - Complete

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

**Documents for Samuel Marney** **ADD DOCUMENT**

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
Samuel Marney_L3 LD Successful Feedback.pdf	<b>MARK AS EVIDENCE</b>	2 months ago