

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



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'.

Forgot Password	
Enter your username below a	and you will be sent an email with a link to reset your password.
Username	
	Send Reset Email

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.

Smart End Point Assessment	CIPD						Any Profile Help	victoria.hilto	n Logout
SetTING MANAGEMENT	DASHBOARD Welcome Back, Victoria Hilton							CLOSE ALL	TABS 🗃
User Defined Lists Add Standard Add Dunlicate Standard	Dashboard Standard × ×								
View/Edit Standards EPAO Settings	STANDARD						Save	Save and Close Car	ncel 🗙
View/Edit Import Templates Import Data	Details Moderation Options/Pathw	vays Checklist							
Add Custom Field View/Edit Custom Fields View/Edit Products	Name				Level	0			
	LARS Code				Standard Code				\square
	Published Date	Please Select 04/09/2022		~		0.00			
Am ASSESSOR OMANAGEMENT	Apprenticeship Length	0	Months 0	Days					
	Apprentice EPA Notice	0	Months 0	Days					

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

Smart End Point Assessment	CIPD	leowebstercipd
	DASHBOARD	
	Welcome Back, Leowebstercipd	CLOSE ALL TABS 會
Add Apprentice	ADD APPRENTICE	Save Save and Close Save and New Cancel X
View/Edit Apprentices	Personal Details EPA Details	
	Create User	
	ULN	
Fa epa	Title	Email
	- Please Select V	Phone Number
REPORTING O	Family Name 5-4640-b608-d1323f1891d6/Dashboard#tab-0b79a00e-d653-435e-a235-8c7f1a7fe069	Mobile Number

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.

	Smart End Port Assassment			Jonathon Loxley
	Dashboard Standard *			
Email Template Management	STANDARD	R		Save Save and Close Cancel 🗙
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Maintain Logo View/Edit Import Templates	LARS Code		Cancel	0.00
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View/Edit Custom Fields View/Edit Products	Published Date	14/03/2018		
	Apprenticeship Length	0 Months 0	Days	
	Maximum Retry Attempts (-1 = Unlimited)	-1	Attempt All Assessment Types Before Resits?	
	Price		Currency	Please Select -
	Charge Code			
	ASSESSMENT TYPES		- Please Select -	ADD ASSESSMENT TYPE MAPPING
	ASSESSMENT APPRENT	ICE MAXIMUM RETRY MINIMUM A	SSESSOR/ASSESSMENT MINIMUM	OVERALL RESULT GRADES ACTIONS

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.

	DASHBOARD Welcome Back, Jonathon Loxley CLOSE ALL TABS
	Dashboard Add Employer 🖈 - Add Employer 🖈 - Add Employer -
ASSESSOR MANAGEMENT	Details Additional Details
A ASSESSMENT CENTRE C MANAGEMENT	Name
	Employer ID ESFA Funded? Not Set
Add Employer View/Edit Employers	Contract Required? - Unknown -
TRAINING PROVIDER MANAGEMENT	Contract D
Pa EPA 📀	ADD ADDRESS O
	PRIMARY TYPE ADDRESS LINE 1 ADDRESS LINE 2 TOWN COUNTY POSTCODE ACTIONS

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'.

Sm SETTING MANAGEMENT	DASHBOARD Welcome Back, Jonathon Loxley					CLOSE ALL TABS
APPRENTICE Am APPRENTICE	Dashboard Add Employer	Add Employer 🖈 🔹	Add Employer *		Save Save and Close	Save and New Cancel X
Am ASSESSOR MANAGEMENT ©	Details Additional Detail	S				
Em MANAGEMENT	Name Employer ID	RM Associates RM01875523		ESFA Funded?	True	•
Add Employer View/Edit Employers	Contract Required? Contract	Unknown Unknown Yes No	•			
	ADDRESSES					
	PRIMARY TYPE	ADDRESS LINE 1 A	DDRESS LINE 2	TOWN COUNTY	POSTCODE	ACTIONS

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

SETTING Sen MANAGEMENT	\odot	Name	Fill Assessmen				
USER MANAGEMENT	\odot	Employee 10	104014/1020		ESFA Foremat?	[14	
APPRENTICE MANAGEMENT	\odot	Contract Harganet?	-				
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Add Employer View/Edit Employers		CONTACTS					ADD SERVINCT O
TRAINING PROVIDER MANAGEMENT	\odot	TAALOI:	JOB TITLE	EMAL LANCEINE	MOBILE .	CTHER	ACTIONS
E Pa EPA	\odot					R.	
COMMUNICATION HISTORY	\odot	Copyright © 2018 Smart Apprentices	Ltd. All rights maarved	1 v 1.4.1281 (TEST)			Streat Appreciates

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.

Sm SETTING MANAGEMENT	Name	RM Associates		
	ADDRESS DETAIL	S	×	٣
	Cc	-		
	Cé Cé	'Address Line1' should not be empty.		
	Address Line 2			ADD ADDRESS 🛇
	PR	'Town' should not be empty.		ACTIONS
Add Employer	County	- Please Select This field is required.	•	
TRAINING PROVIDER	Post Code	'Post Code' should not be empty.		ADD CONTACT 🔿
			Close	ACTIONS
		Save	Ciose	

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').

ADDRESSES	
PRIMARY	TYPE
	Please Select - 🗸
	Home Business Branch Office

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.

		RM Associates			
	Employer ID	RM01875523	ESFA Funded?	True	*
	Contract Required?	ETAIL S		×	
	Co				
	Γ	'Forename' should not be empty.			ADD ADDRESS •
	Surname	'Surname' should not be empty.			ACTIONS
	₽ Job Title	'Job Title' should not be empty.			Q 🖌 💿
Add Employer	Email			Prefd	
View/Edit Employers	Landline Number			© Prefd	
TRAINING PROVIDER MANAGEMENT	NA Mobile Number			Prefd	
Fa epa	L			Save Close	

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'.

SETTINO MANAGEMENT USER MANAGEMENT	0	DASHBOARD Welcome Bach, Jonathen Lesley Daathooan Add Employer 🛩	 Add Employee * - 	kát Employer * 💽	I		GLONE ALL TARS
APPRENTICE MANAGEMENT	0	ADD EMPLOYER				See Sectors Do	E. Save and New Cancel X
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Add Employer Vew/Edit Employers		Contract Respond?		•			
TRAINING PROVIDER MANAGEMENT	0	Corrac					
EPA EPA	\odot	ADDRESSES					
COMMENSION INSTORY	\odot	SHEALEY THE	ACTINE IS LINE 1	ACCRECISION 2	SOMN COLDIN	y Poststate	ACTIONS

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

	Dashboard Add Employer 🖈 * Add Employer 🖈 • Add Employer * •		
	ADD EMPLOYER	Save Save and	Close Save and New Cance
	Details Additional Details		
	SECTORS	Accounting	ADD STANDARD SECTOR 📀
ASSESSMENT CENTRE	STANDARD SECTOR NUMBER OF APPRENTICES	- Please Select Accounting Actuanal	ACTIONS
	Accounting 0	Administration Adult care	0
EMPLOYER MANAGEMENT		Agriculture. Environmental and Animal Care Airworthness	
Add Employer View/Edit Employers	LINKED TRAINING PROVIDER(S)	Automotive services Automotive Automotive retail Aviation	ADD TRAINING PROVIDER O
	TRAINING PROVIDER	Boatbuilding Building and Construction	ACTIONS
	DOCUMENTS	Buildong services engineering Bus, Coach and HGV Butchery Catering and hospitality Composites	ADD DOCUMENT ©

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

	DASHBOARD Welcome Back, Jonathon Loxley			CLOSE ALL TABS
	Dashboard Add Employer 🖈 🔹	Add Employer 🖈 🔹 Add Employer 🗶 🔹		
	ADD EMPLOYER		0	Save Save and Close Save and New Cancel X
	Details Additional Details			
	SECTORS		Aviation	ADD STANDARD SECTOR
	STANDARD SECTOR	NUMBER OF APPRENTICES		ACTIONS
Add Employer	Accounting	0		0
View/Edit Employers	Aviation	0		٥
Fa 😔	LINKED TRAINING PROVIDER(S)			College ADD TRAINING PROVIDER
	TRAINING PROVIDER			ACTIONS
Ch HISTORY	College			0

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.

Sepo Smart End Point Assessment		CIPD		My My Profile	EPA.TProvider.Dumm	(y
SETTING MANAGEMENT	⊙ ⊙	DASHBOARD Welcome Back, MyEPA ThroviderDummy Dashboard Engloyers >			CLOSE A	LL TABS
Am MANAGEMENT MANAGEMENT EM PLOYER MANAGEMENT Add Employer ViewlEdit Employers	0	FILTER Show Inactive?			5	Search Q
TRAINING PROVIDER MANAGEMENT	\odot	EMPLOYERS		SEARCH:	REFI	RESH
Ра ЕРА	\odot	COMPANY NAME		\$	IS	ACTIVE? 0
Ch COMMUNICATION	\odot	Leo's Test Employer	5			Yes
Re REPORTING	\odot	Test Employer Showing 1 to 2 of 2 entries	TEST		Pravioue 1	Yes
	\odot	Showing 1 to 2 of 2 entries			Previous	INCAL

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

September 201	nt	CIPD					۵	MyEPA.TProvider.Dummy
SETTING MANAGEMENT	\odot	DASHBOARD						
Um USER MANAGEMENT	\odot	Dashboard Employee +	Employor					CLOSE ALL TABS
APPRENTICE MANAGEMENT	\odot		Employer × ×				Cours Cou	in and Close Pours and Mary Cancel
EMPLOYER MANAGEMENT	\odot	Details Users/Contacts Addition	al Details				Save Sa	
Add Employer		Condicionada Padalon						
View/Edit Employers		Name	Test Employer		Number of Apprer	tice(s) 14		
T TRAINING PROVIDER MANAGEMENT	\odot	Employer ID	TEST		ESFA Funded?	1	False	~
Ера ЕРА	\odot	Contract Required?	No		~			
Ch COMMUNICATION HISTORY	\odot	Contract						
REPORTING	\odot							
		ADDRESSES						ADD ADDRESS O
Re RESOURCES	\odot	PRIMARY TYPE	ADDRESS LINE 1	ADDRESS LINE 2	TOWN	COUNTY	POSTCODE	ACTIONS
		Business ~	Ncfe	Q6	Newcastle upon Tyne	Tyne and Wear	NE12 8BT	Q 🖊 🙆

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.

yne
~

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. Apprentice 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 Apprentice Record

To set up apprentices on SEPA go to 'Apprentice 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 induvial apprentice select 'Add Apprentice'.



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

Smart End Point Assessment		SA Admin S Support & Logout
SETTING MANAGEMENT	DASHBOARD	
	Welcome Back, SA Admin	CLOSE ALL TABS 宣
		Cause Rate and Place Caus and Nature Caped
Add Apprentice View/Edit Apprentices	ADD APPRENTICE	
ASSESSOR MANAGEMENT	Personal Details EPA Details	
ASSESSMENT CENTRE Cm MANAGEMENT	Create User	
T TRAINING PROVIDER MANAGEMENT	Title Please Select	Email
	Given Name	Phone Number

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

ADD APPRENTICE					
EPA Details	Product(s)	Other			
	EPA Details	EPA Details Product(s)			

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'.

Sepon Smart End Point Assessment		SA Admin (C Support) (+ Log
	Dashboard Add Apprentice * × ×	
	ADD APPRENTICE	Save Save and Close Save and New Cancel 🗙
	Personal Details EPA Details	
Add Apprentice View/Edit Apprentices	Create User	
ASSESSOR MANAGEMENT	User Name	User Groups
ASSESSMENT CENTRE O	J Johnson ULN	Apprentice Management
	Title	Email
	- Please Select Version Name	Phone Number

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.

Seno	CIDD		MyEPA.TProvider.Dummy
Smart End Point Assessment			My Profile PREVIEW FEATURES
	DASHBOARD		
	Welluffie Bauk, MyErik (Provide Lufi Fity) Dashboard Add User T		CLOCK PILL (PILL (PILL)
Add User View/Edit Users	ADD USER	Save	Save and Close Save and New Cancel X
	Personal Details Permissions		
	Usemame		
Ба Ера	Title	Email	
	Please Select		
	Oven Name	Phone Number Ext. +1234 Please enter either a phone or mobile number	
	Family Name	Mobile Number	
Ŭ	Company Name	Please enter either a phone or mobile number	
	Job Title	(UTC+00.00) Dublin, Edinburgh, Lisbon, London	~
	○ Is Apprentice?		

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.

Smart End Port Assessment	CIPD			MyEPA.TProvider.Dummy
	DASHBOARD Welcome Back, MyEPATProvider,Dummy			CLOSE ALL TABS 🖀
Um USER MANAGEMENT	Dashboard Add User * / 🕒			
	ADD USER Personal Details Permissions			Save Save and Close Save and New Cancel X
	EPA Counter Alert	 Contract Limit Alert 	View All Support Tickets	
Pm MANAGEMENT	User Groups Available		Selected	
	CIPD Apprentices			
RE REPORTING				
	CIPDD DASHBOARD Vetcome Back: MyEPATPiowderDummy Deathbard			MyEPA.TProvider.Dummy
ViewEdit Users	ADD USER Personal Details Permissions			Save Save and Close Save and New Cancel X
	EPA Counter Alert	Contract Limit Alert	View All Support Tickets	
Pm MANAGEMENT	User Groups Available		Selected	
	CIPD Apprentices		CIPD Apprentices	

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.

Smart End Point Assessment			SA Admin Support & Logout
A ASSESSMENT CENTRE MANAGEMENT	DASHBOARD Welcome Back, SA Admin		CLOSE ALL TABS 會
EMPLOYER MANAGEMENT	Dashboard Add Apprentice * * ×		
TRAINING PROVIDER MANAGEMENT	ADD APPRENTICE		Save Save and Close Save and New Cancel 🗙
View/Edit Training Provider/College	Personal Details EPA Details		
Е ЕРА 📀	Employer		Training Provider/College
	- Please Selects Employer must be specified Employment Address		- Please Select - Training Provider must be specified Training Address
	- Please Select Employment Address must be specified	•	- Please Select Training Address must be specified
	Standard	Ŧ	LARS Code
	Standard Version must be specified		EPA Start Date (expected)

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 with automatically set to the typical on programme duration given in the assessmemnt 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.

	Apprenticeship Length	
SETTING Sm MANAGEMENT	0 Months 0 Days	
	EDA DETAILS	
Um USER MANAGEMENT	LFA DETAILS	
\odot	Apprenticeship Start Date	Apprenticeship End Date (expected)
APPRENTICE Am MANAGEMENT	31/08/2022	31/08/2023
	EPA Start Date (expected)	Registration PO Number
Add Apprentice	31/08/2023	
View/Edit Apprentices	Registration Invoice	EPA PO Number
Am MANAGEMENT	EDA Invoice	Accessor / Tutor Name
ASSESSMENT CENTRE		
Cm MANAGEMENT	Line Manager Name	Line Manager Contact
\odot		
EMPLOYER	Apprentice Coordinator	Eunding Type
		. manifi the
Add Employer		- Please Select -
View/Edit Employers	Has EPA Membership? 🗆	
Tom Lat Employers		
TRAINING PROVIDER	REASONABLE ADJUSTMENTS	
Pm MANAGEMENT	Are Reasonable Adjustments Required?	
(w)		

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 calender 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 confimred the 'Apprenticeship End Date (expected)' field must be updated to reflect the change.

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

Smart End Point Assessment	CIPD	leowebstercipd			
	EMPLOYMENT / TRAINING DETAILS				
	Employment Address				
	Nofe, Oß, Newcastie upon Tyne, NE12 88T V Nofe, Oß, Newcastie upon Tyne, NE12 88T	¥			
Add Apprentice View/Edit Apprentices	STANDARD DETAILS Standard				
	HR Consultant / Partner - Level 5 (190 - v1.00)				
Add Employer View/Edit Employers	STANDARD INFORMATION ASSESSMENT TYPES LARS CODE	PUBLISHED DATE			
	CONSULTATIVE PROJECT PROFESSIONAL DISCUSSION 190	18 August 2017			
Fa epa 🛇	Apprenticeship Length 12 Months 0 Days				
	EPA DETAILS				
	Apprenticeship Start Date Apprenticeship End Date (expected) 17/12/2018 #				
	EPA Start Date (expected) Registration PO Number 17/13/001-0.				

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.

Funding Type	,
Please Select	~
Please Select	
Government Funded	
Employer Funded	
updated to correspond.	

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.

	Please Select	
	Scribe or Speech Recognition Technology	~
	Computer Reader or Speech Recognition Technology Enabled Transcriber	
	Modified Paper Request: Enlarged Paper	
	Modified Paper Request: Coloured Paper	
e	Reader or Computer Reader	
	Other (Please specify)	
	Bilingual Translation Dictionary (with extra time up to 25%)	
	Extra Time: up to 100%	
	Extra Time: up to 50%	
	Modified Language Paper	
	Practical Assistant	
	Braille Papers and/or Tactile Diagrams	
	Extra Time: up to 25%	
	Oral Language Modifier	
	Please Select V	ADD REASONABLE ADJUSTMENT 🗲

ACTIONS

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.

Smart End Point Assessm		IPD							leowebstercipd	Logout
SETTING		Resource Type	e ⊛ File ⊚ Url			Category	Please Select		٣	
Sm MANAGEMENT	S	Assessment Centre	- Please Select		•	Assessor	Please Select		•	
USER Um MANAGEMENT	\odot	Employe	Please Select		¥	Training Provider	Please Select		¥	
APPRENTICE Am MANAGEMENT	\odot	Document Name	•			Document Type	Please Select		•	
Add Apprentice		Document Create	d From	Ш То		Standard	Please Select		Ŧ	
View/Edit Apprentices									Apply Filter	
Em EMPLOYER MANAGEMENT	\odot									
Add Employer View/Edit Employers		RESOURCES						SEARCH: bulk		
TRAINING PROVIDER MANAGEMENT	\odot								REFRESH	
F		RESOURCE TYPE 🕴 NA	ME	↓ URL	CATEGORY	UPLOADED WHEN	AST EDITED	EDITED BY USER	IS ACTIVE? \$	
Pa EPA		File Bulk	Upload Apprentice Import Template	v2.0.xlsx	Training Provider Docs	04/07/2018 @ 08:45 28	/11/2018 @ 12:24 K	iristyberesford@ncfe.org.uk	Yes	
Ch HISTORY	\odot	File Bulk	Upload Employer Import Template v	1.1.xlsx	Training Provider Docs	04/07/2018 @ 10:27 08	/11/2018 @ 13:16 K	iristyberesford@ncfe.org.uk	Yes	
REPORTING	\odot	File How	to bulk upload apprentices.mp4		Training Provider Docs	19/10/2018 @ 11:06 19	/10/2018 @ 11:07 K	iristyberesford@ncfe.org.uk	Yes	
R. RESOURCES	\odot	Showing 1 to 3 of 3 entries (filtered from 50 total entries) Previous 1 Next .								

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

Sepon Smart End Point Assessm	ent	CIPD		leowebstercipd
SETTING Sm MANAGEMENT	\odot	DASHBOARD		
USER MANAGEMENT	\odot	Dashboard Resources X X	Edit Resource 🖌 📧	
APPRENTICE Am MANAGEMENT	\odot	RESOURCE		Cancel X
EMPLOYER MANAGEMENT	\odot	Date Created	04/07/2018 08:45:52 by BenStobbs@ncfe.org.uk	
	\odot	Last Updated	28/11/2018 12:24:39 by Kristyberesford@ncfe.org.uk	
EPA EPA	\odot	Resource Category	Training Provider Doos	Y
	\odot	Standard Resource Type	File	
	\odot	Versions		
	\odot	CURRENT VERSION FILENA	ME TYPE CREATED DOCUMEN	T DATE
View Resources		Bulk Upic	ad Apprentice Import Template v2.0.xisx .xisx .28/11/2018 12:24:25 by Kristyberesford@nde.org.uk	18 12:24:04 III Download 🛓 Email 🕿
smartepa.co.uk//370bf2c	c-ba13-4d	d98-91ce-3586fbd863bd?versionId=2b47	32ec	-

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

A	utoSave 💽 🖪 🤌) ~ (~ B ~		rentice Impor - Excel	∠ Sear	ch (Alt+Q)	
Fi	le Home Insert	Draw Pag	e Layout Formul	as Data Revi	ew View	Help	Acrobat
E12	2 - : ×	√ fx					
	А	В		C	D	E	F
1	Training Provider UKP	RN * ULN	* Standar	rd Name*	Title * Fo	orename *	Surname *
2							
3							
4							
5							
6							
7							
8							
9							
10		1					

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'.

Smart End Point Assessme	ent	CIPD	leowebstercipd
SETTING Sm MANAGEMENT	\odot	DASHBOARD	
Import Data		Welcome Back, Leowebstercipd	CLOSE ALL TABS 箇
USER UM MANAGEMENT	\odot	Dashboard Resource ≠ 💌 Edit Resource ≠ 💽	
APPRENTICE MANAGEMENT	\odot	RESOURCE	Cancel 🗙
EMPLOYER MANAGEMENT	\odot	Date Created 04/07/2018 08:45:52 by BenStobbs@ncfe.org.uk	
	_	Last Updated 28/11/2018 12:24:39 by Kristyberesford@ncfe.org.uk	
Pm MANAGEMENT	\odot	Resource Category Training Provider Docs	¥
E Pa EPA	\odot	Standard	
	0	Resource Type File	
Ch HISTORY	\odot	Versions	

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

Smart End Point Asse	essment	CIPD		LeoWebster
SETTING Sm MANAGEMENT	\odot			
USER UMANAGEMENT	\odot	Dashboard		CLOSE ALL IABS I
APPRENTICE Am MANAGEMENT	\odot			
ASSESSOR Am MANAGEMENT	\odot	Select the Excel document (.xls or	Browsqufile	
ASSESSMENT CE Cm MANAGEMENT		Select an Import Template	An import file must be specified	v
EMPLOYER MANAGEMENT	\odot	Import Options	An Import Template must be specified	
T TRAINING PROVID Pm MANAGEMENT		Update, if exists? (except for importing Assessor(s))		
E Pa EPA	\odot			•

Select the 'Bulk Upload Apprentice Import' file.

s	Repo mart End Point Assessme	ent	CIPD			LeoWebster
Sm	SETTING MANAGEMENT	\odot	DASHBOARD			
Um	USER MANAGEMENT	\odot				GLOSE ALL IABS I
Am	APPRENTICE MANAGEMENT	\odot				
Am	ASSESSOR MANAGEMENT	\odot	Select the Excel document (.xls or	Erouro filo		Upioad Data Close
A Cm	ASSESSMENT CENTRE MANAGEMENT	Ē⊘	.xlsx) to import Select an Import Template	An import file must be specified		
Em	EMPLOYER MANAGEMENT	\odot		Please Select		
			Import Options	Import Apprentices	5	
Pm	T TRAINING PROVIDER Pm MANAGEMENT		Update, if exists? (except for importing Assessor(s))	Import Employers		
E Pa	EPA	\odot				Ţ

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'

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SETTING Sm MANAGEMENT	\odot	DASHBOARD
USER Um MANAGEMENT	\odot	Dashboard
	\odot	DASHBOARD
ASSESSOR MANAGEMENT	\odot	
ASSESSMENT CENTRE MANAGEMENT	⁼⊙	
Em EMPLOYER MANAGEMENT	\odot	
TRAINING PROVIDER MANAGEMENT	\odot	
Smart End Point Assessmen	nt	
SETTING Sm MANAGEMENT	\odot	DASHBOARD
USER MANAGEMENT	\odot	Dashboard
APPRENTICE MANAGEMENT	\odot	
Add Apprentice View/Edit Apprentices		DASHBOARD
ASSESSOR MANAGEMENT	\odot	
ASSESSMENT CENTRE MANAGEMENT	\odot	
EMPLOYER	ବ	

Find your	apprentices	usina the fi	ilter at the to	p of the page	e and select 'Search.
,					

Sepa		SA Admin Sa Admin
SETTING SETTING SANAAGEMENT	Dashboard Apprentice List	
	FILTER	
	Employer	Please Select
Add Apprentice	Training Provider	- Please Select -
Vew/Edit Apprentices	Standard	- Please Select
Am ASSESSOR SAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA	Apprentice Status	Please Select
	PO No# or Invoice References	PO No#, Registration Invoice Ref, Epa PO No#, Epa Invoice Ref, Epa Resit PO No#
EMPLOYER .	Show Inactive?	
		Search Q
	APPRENTICES	SEARCH

Click on the apprentice you would like to view.

Smart End Poirt Assessment	i, it Loading ∣	SA Admin Support (+ Logout
	PO No# or Invoice References PO No#, Registration Invoice Ref, Epa PO No#, Epa Invoice Ref, Epa Resit PO No#	
	Show Inactive?	Search Q
Add Apprentice View/Edit Apprentices	APPRENTICES SEARCH:	REFRESH
ASSESSOR MANAGEMENT	ULN © NAME EMAIL ADDRESS © EPA EXP START DATE © STATUS © LAST UPDATED DATE ©	IS ACTIVE?
	2345678966 Hanngh_Long hannah@long.com 15/08/2019 New 15/08/2018	Yes
	5634563456 Jon Johnson jonjohnson@gmail.com 25/07/2019 Gateway Unassigned 13/08/2018	Yes
	Showing 1 to 2 of 2 entries Previous	1 Next

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

DASHBOARD Velcome Back, SA Adr	nin						CLOSE ALL TA
Dashboard Appr	rentice List 💉 🤞	Edit Apprentice					
	Apprentice Sta New	itus -	Save	Save and Close	Save and New	Cancel 🗙	Deactivate Apprentice S
Personal Details	EPA Details	Occuments Checklist	Bookin	gs/Resits			
ULN				Added On 15/08/2	018		
2345678966							
Title				Email			
Miss			٠	hannah@long.com	m		
Given Name				Phone Number			
Hannah				0000000000000			
Family Nama				Mahila Mumhar			

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		D
Apprentice has a Level 2 in Maths and English		0
Apprentice has achieved the relevant knowledge		0
Consultative Project Scope (add the same document as the Employer declaration here)		•
Employer declaration form (add the same document as the consultative project scope here)		D
Apprentice has signed the "CIFD Certificate Claim Authorisation Form"		
I confirm that the "EPA Start Date (expected)" listed on the EPA details page for this apprentice is the requested date for the	e Professional Discussion and this can be accomodated by the apprentice and employer.	D
SIGN OFF		
Signed Off by Training Provider?	0	
Signed Off by CIPD?		
DETAILS Completed On		

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

Sepo Smart End Point Assessment	CIPD		LeoWebster
	SIGN OFF		•
Sm WWWGEMENT	Signed Off by Employer?		
	Signed Off by Training Provider?		
—	Signed Off by Assessor/Assessment Centre?		
	DETAILS		
Add Apprentice	Completed On		
View/Edit Apprentices	ITEMS		
	CHECKLIST		CHECKLIST DOCUMENT COUNT - 0
	QUESTION	ANSWER	
	Apprentice has been on the programme for minimum of 1 year	Ţ2	
	Appropriate has a Level 2 in Matter and English		
	Apprendoe has a cever 2 in manis and cingnan		
	Apprenice has achieved the relevant knowledge		
	Consultantive Project Synopsis	0	
	Signed statement of competence from employer	0	

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

CHECKLIST EVIDE	NCE			ADD DOCUMENT 3
DOCUMENT NAME	TYPE	UPLOADED BY	DATE UPLOADED	ACTIONS

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

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ganise 🔻 New fol	der			BE • 🔲	0					
OneDrive	Name	^	ate modified	Туре					SA Adm	in
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	Example2	1	5/08/2018 10:45	Microsoft Wo	rd D					
B SD Objects	🖆 Example3	1	5/08/2018 10:46	Microsoft Wo	rd D		***			
Desktop										
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Music										-
Pictures										
Videos										-
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ASSESSMENT CE					NAME			UPLOADED		
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EMPLOYER					Browsenie	001	aumin@amanasaesaon.co.uk	15/06/2010	Delete III	
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TRAINING PROVI										
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TRAINING PROVI MANAGEMENT		Example 2: Has Learne	r 🗉							1

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

m.

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

SIGN OFF		
Signed Off by Training Provider?	0	
Signed Off by CIPD?	0	
DETAILS		
Completed On		

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.

Sepo Smart End Point Assessme	int	CIPD	MyEPA.TProvider.Dummy
SETTING Sm MANAGEMENT	\odot	DASHBOARD	
Um USER MANAGEMENT	\odot	Welcome Back. MyEPA.TProvider.Dummy	CLOSE ALL TABS 🗂
APPRENTICE MANAGEMENT	\odot	Dashboard Apprentices * Edit Apprentice * Request ERA* *	
Add Apprentice		EDITAPPRENTICE Unassigned	Save Save and Close Save and New Cancel X Request EPA
View/Edit Apprentices		Personal Details EPA Details Documents Checklist Booking(s) / Resit(s) Tracked Changes Other	Notes
EMPLOYER MANAGEMENT	\odot		
T TRAINING PROVIDER MANAGEMENT	\odot	7845741454	Maga / 1 19/11/2013
F	\sim	Title	Email
Ба ЕРА	\odot	Wr 🗸 🗸	test@testt.com
COMMUNICATION	\odot	Given Name	Phone Number
Cn HISTORY	\mathbf{C}	Family Name	EXL +1234
Re REPORTING	\odot	Test	07876457382
		DOB	Ethnic Origin
Re RESOURCES	\odot	18/07/2000 🗰 22 year(s) old	- Please Select 🗸

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

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Smart End Point Assessmen	e.					A My Profile	PREVIEW FEATURES	C Logout
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Um USER MANAGEMENT	\odot	Dashboard Apprentices 🖈 🖈 Edit Apprent	ce 🖈 🗴 Request EPA 🗡 🗴					
Am APPRENTICE MANAGEMENT	\odot						_	
Add Apprentice		REQUEST EPA						Close 🙁
View/Edit Apprentices EMPLOYER MANAGEMENT	\odot	We have been unable to pre-populate some of the • Logged in User does not have access to the • No default EBA location has been exectled.	fields on this form. This could be due to Standard, Employer and/or Training P	to one or more of the following reasons: trovider				
T TRAINING PROVIDER MANAGEMENT	\odot	Dependent on the Apprentices status, you can con	inue to use this form as normal.					
E Pa EPA	\odot	Standard Pi	ease Select					~
	\odot	Standa	ra musi de specified			Re	set 🕄 Get Apprentice	e(s) Q
Re REPORTING	\odot	SELECT APPRENTICE(S)	Please Select				Add Apprentice(s)	•
Re RESOURCES	\odot	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE		ACT	IONS

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

Sepon Smart End Point Assessm	ent	CIPD				MyEPA. TProvider.Dummy
SETTING Sm MANAGEMENT	\odot	DASHBOARD Welcome Back. MyEPA.TProvider.Dumm	y/			CLOSE ALL TABS
Um USER MANAGEMENT	 ⊘ 	Dashboard Apprentices 🖈 🗴 Edit	Apprentice 🖈 💌 Request EPA 🖈 🔹			
Am MANAGEMENT Add Apprentice	\odot	REQUEST EPA				Close Q
EMPLOYER Em MANAGEMENT	⊘	We have been unable to pre-populate som	e of the fields on this form. This could be d ss to the Standard, Employer and/or Trainin	ue to one or more of the following reasons: Ig Provider		
T TRAINING PROVIDER MANAGEMENT	\odot	Dependent on the Apprentices status, you	can continue to use this form as normal.			
Ера ЕРА	\odot	Standard	Please Select			~
Ch COMMUNICATION HISTORY	\odot		Please Select Administration HR Support - Level 3 (191 - v1.00) Learning and Development Consultant /Bu	siness Partner Standards - Level 5 (20002020 - v1.00)		
Re REPORTING	\odot	SELECT APPRENTICE(S)	Management Consultancy HR Consultant / Partner - Level 5 (190 - v1	andards - Level 3 (20001920 - v1.00) .00)		nua apprince(a)
Re RESOURCES	\odot	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..

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Smart End Point Assessme	nt.					& My Profile	PREVIEW FEATURES	C Logout
SETTING Sm MANAGEMENT	\odot	DASHBOARD						TADS 🛱
Um USER MANAGEMENT	\odot	Dashboard Apprentices & Edit	Apprentice	1			CEDIBERE	
APPRENTICE MANAGEMENT	\odot							
Add Apprentice		REQUEST EPA						Close 😣
View/Edit Apprentices		Standard	HR Support - Level 3 (191 - v1.00)					~
Em EMPLOYER MANAGEMENT	\odot	EPA Location	Please Select					~
TRAINING PROVIDER MANAGEMENT	\odot		- Please Select Apprentice's Training Provider Apprentice's Work Place Assessment Centre					
E Pa EPA	\odot	SELECT APPRENTICE(S)	Remote Smart Room Please Select			_	Add Apprentice(s)	0
Ch COMMUNICATION HISTORY	\odot	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE		ACT	IONS
Re REPORTING	\odot							
Re RESOURCES	\odot							

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

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Smart End Point Assessme	et					PREVIEW FEATURES
Sm SETTING MANAGEMENT	\odot	DASHBOARD				
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APPRENTICE Am MANAGEMENT	\odot					
Add Apprentice		REQUEST EPA				Close 🖸
View/Edit Apprentices		Standard	HR Support - Level 3 (191 - v1.00)			~
EMPLOYER MANAGEMENT	\odot	EPA Location	Apprentice's Work Place			v
TRAINING PROVIDER MANAGEMENT	\odot	Employer	Please Select			~
E	୍	Employer Address	Please Select Leo's Test Employer			
Pa EPA	•					
Ch COMMUNICATION HISTORY	\odot					Reset 😂 Get Apprentice(s) Q
Re REPORTING	\odot	SELECT APPRENTICE(S)	Please Select			Add Apprentice(s) O
		APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
Re RESOURCES	\odot	-				

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

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SETTING Sm MANAGEMENT	⊘ ⊘	DASHBOARD Welcome Back, MyEPA, TProviderDumm	y			CLOSE ALL TABS
Am APPRENTICE MANAGEMENT Add Apprentice	\odot	REQUEST EPA	Apprentice X Kequest EPA X			Citose O
	⊘	Standard EPA Location	HR Support - Level 3 (191 - v1.00) Apprentice's Work Place			•
Pm MANAGEMENT	⊘ ⊘	Employer Employer Address	Test Employer Ncfe, Q6, Newcastle upon Tyne, NE12 8BT - Please Select -			~
Ch HISTORY	0	SELECT APPRENTICE(S)	Please Select			Reset 🐼 Get Apprentice(s) Q
Re REPORTING	0	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS

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

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Smart End Point Assessm	ent.					My Profile PREVIEW FEATURES	out
SETTING Sm MANAGEMENT	\odot	DASHBOARD					
Um USER MANAGEMENT	\odot		Apprentice - Dequest EDA * - E	1			
APPRENTICE MANAGEMENT	\odot						
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View/Edit Apprentices		Standard	HR Support - Level 3 (191 - v1.00)			~	
Em EMPLOYER MANAGEMENT	\odot	EPA Location	Apprentice's Work Place			~	
T TRAINING PROVIDER MANAGEMENT	\odot	Employer	Test Employer			~	
Е ЕРА	\odot	Employer Address	Ncfe, Q6, Newcastle upon Tyne, NE12 8BT			~	
Ch COMMUNICATION	\odot					Reset 🖉 Get Apprentice(s) Q	ce(s)
	\odot	SELECT APPRENTICE(S)	Please Select			Add Apprentice(s) O	
	0	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS	
Re RESOURCES	\odot						

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.

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Smart End Point Assessm	ient.					A My Profile	PREVIEW FEATURES	G Logout
SETTING Sm MANAGEMENT	\odot	DASHBOARD						
Um USER MANAGEMENT	\odot	Welcome Back, MyEPA.TProvider.Dumm					CLOSE AL	L TABS
APPRENTICE MANAGEMENT	\odot	Dashboard Apprentices 🖈 🗴 Edit	Apprentice 💉 🗴 Request EPA * 🗴 🗴					
Add Apprentice	-	REQUEST EPA						Close 🙁
	\sim	Apprentice list updated						×
Em MANAGEMENT	\odot	Standard	HR Support - Level 3 (191 - v1.00)					~
TRAINING PROVIDER MANAGEMENT	\odot	EPALocation	Apprentice's Work Place					
E Pa EPA	\odot	Employer	Test Employer					~
Ch COMMUNICATION	\odot	Employer Address	Ncfe, Q6, Newcastle upon Tyne, NE12 8BT					~
	\odot					Re	set 🗯 Get Apprentice	e(s) Q
Re RESOURCES	\odot	SELECT APPRENTICE(S)	Please Select				Add Apprentice(s)	•
		APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE		ACT	IONS

Now click 'Please Select' within the 'Select Apprentice' and select the apprentice.

Seno					Myt	EPA. TProvider. Dumm	y 💄
Smart End Point Assessme	et.				A My Profile	PREVIEW FEATURES	🕞 Logout
SETTING Sm MANAGEMENT	\odot	DASHBOARD					
Um USER MANAGEMENT	\odot	Welcome Back. MyEPA.TProvider.Dummy				CLOSE AL	L TABS 🖀
APPRENTICE Am MANAGEMENT	\odot	Dashboard Apprentices 🖈 🗴 Edit A	pprentice	X Request EPA * X x			
Add Apprentice		REQUEST EPA					Close 😂
View/Edit Apprentices		Standard	HR Supp	orf - Level 3 (191 - v1.00)			~
Em EMPLOYER MANAGEMENT	\odot	EPA Location	Apprenti	ce's Work Place			~
T TRAINING PROVIDER Pm MANAGEMENT	\odot	Employer	Test Em	sloyer			~
E Pa EPA	\odot	Employer Address	Ncfe, Q6	Newcastle upon Tyme, NE12 88T			~
Ch COMMUNICATION	\odot				R	eset 🗯 🚺 Get Apprentic	e(s) Q
	\odot	SELECT APPRENTICE(S)		Please Select		Add Apprentice(s)	•
Re REPORTING		APPRENTICE NAME		CIPD Test		ACT	TIONS
RESOURCES	\odot						

More than one apprentice can be requested.

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

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Smart End Point Assessme	et.					My Profile PREVIEW FEATURES	đ
SETTING Sm MANAGEMENT	\odot	DASHBOARD					
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Add Apprentice		REQUEST EPA				Close 🔾	
View/Edit Apprentices		Standard	HR Support - Level 3 (191 - v1.00)			~	
EMPLOYER MANAGEMENT	\odot	EPA Location	Apprentice's Work Place			~	
T TRAINING PROVIDER MANAGEMENT	\odot	Employer	Test Employer			~	
Ера ЕРА	\odot	Employer Address	Ncfe, Q6, Newcastle upon Tyne, NE12 8BT			~	
	\odot					Reset 3 Get Apprentice(s) Q	
Re REPORTING	\odot	SELECT APPRENTICE(S)	× CIPD TEST			× Add Apprentice(s) �	
		APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS	
Re RESOURCES	\odot						

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'.

Sepo Smart End Point Assessme	nt	CIPD				MyEPA.TProvider.Dummy
SETTING Sm MANAGEMENT	\odot	DASHBOARD				
Um USER MANAGEMENT	\odot	Welcome Back, MyEPA.TProvider.Dumm				CLOSE ALL TABS
APPRENTICE MANAGEMENT	\odot	Dashboard Apprentices 🗡 🗴 Edit /	Apprentice 🥓 🗴 Request EPA * 🗴			
Add Apprentice		REQUEST EPA				Close 😒
View/Edit Apprentices		Standard	HR Support - Level 3 (191 - v1.00)			~
Em MANAGEMENT	\odot	EPA Location	Apprentice's Work Place			~
TRAINING PROVIDER MANAGEMENT	\odot	Employer	Test Employer			•
Ера ЕРА	\odot	Employer Address	Ncfe, Q6, Newcastle upon Tyne, NE12 8BT			v
Ch COMMUNICATION	\odot					Reset 🗯 Get Apprentice(s) Q
REPORTING	\odot	SELECT APPRENTICE(S)	Please Select			Add Apprentice(s) 📀
	~	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
Re RESOURCES	\odot	CIPD Test (7845741454)	Test Employer	CIPD test provider	18/07/2020	Remove 🛛
						Match Assessor(s) Q Match Assessor(s)

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.

Smart End Point Assessment		CIPD				MyEPA.TProvider.Dummy
SETTING MANAGEMENT	\odot	DASHBOARD				
Um USER MANAGEMENT	\odot	Dashboard Apprentices * x Edit	Apprentice * Request EPA * *			
APPRENTICE MANAGEMENT	\odot					
Add Apprentice		REQUEST EPA				Close 😂
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Ера ЕРА	\odot	SELECT APPRENTICE(S)	Please Select			Add Apprentice(s) •
	\odot	APPRENTICE NAME	EMPLOYER	TRAINING PROVIDER	EXPECTED EPA DATE	ACTIONS
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The request EPA process is now complete.

7. Uploading the EPA Evidence

From the Navigation Menu select 'Apprentice Management'.

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Select 'View/Edit Apprentices'.

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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'.

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	FILTER	
	Employer	Please Select
Add Apprentice	Training Provider	Please Select
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The lower portion of the page will show all apprentices within the parameters of the applied filter.

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	ULN © NAME EMAIL ADDRESS © EPA EXP START DATE © STATUS © LAST UPDATED DATE © IS ACTIVE? ©	
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	5634563456 Jon Johnson Jonjohnson@gmail.com 25/07/2019 Gateway Unassigned 13/08/2018 Yes	
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Click on the apprentice who's evidence is to be uploaded.

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ASSESSMENT CENTR MANAGEMENT	* ⊙	0101010111	tester	Adam	ap@sa.com	26/02/2019	Pending Confirmation	Yes
EMPLOYER MANAGEMENT	\odot	4982980421	Look	Alike	ap@sa.com	02/03/2019	New	Yes
TRAINING PROVIDER	\odot	7876767776	asas	asafi	sasa@saa.com	22/02/2019	New	Yes
ера	\odot	3253524203	aadam	8585	sfsaf@asas.com	22/02/2018	Gateway Unassigned	Yes
	\odot	2345676542	asd	asđ	asd@asd.asd	02/03/2019	New	Yes
REPORTING	\odot	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'.

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Select 'Add Document'.

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E EPA O		

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

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

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

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

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RA REPORTING	\odot	Copyright © 2018 Smart A	pprentices Ltd. All rights reserved. v.	1.8.3044 (SANDBOX)				Smart Apprentices

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.

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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.

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	Other (Gender)	
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	DISABILITY DETAILS	ACTIONS

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

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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

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Add Apprentice			
	Documents for Samuel Marney This area provides a location for you to upload documents or evidence for your Apprentice. Any cha	anges made in this area are automatically saved.	+ ADD DOCUMENT
ASSESSMENT CENTRE MANAGEMENT	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.



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

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

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	1413133113 Nicki Townsend Nicki Townsend@cipd.co.uk 11032002		New 11/03/2021	Yes	X Checklist X Consultative X Professional Discussion	Project	
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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.

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

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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

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