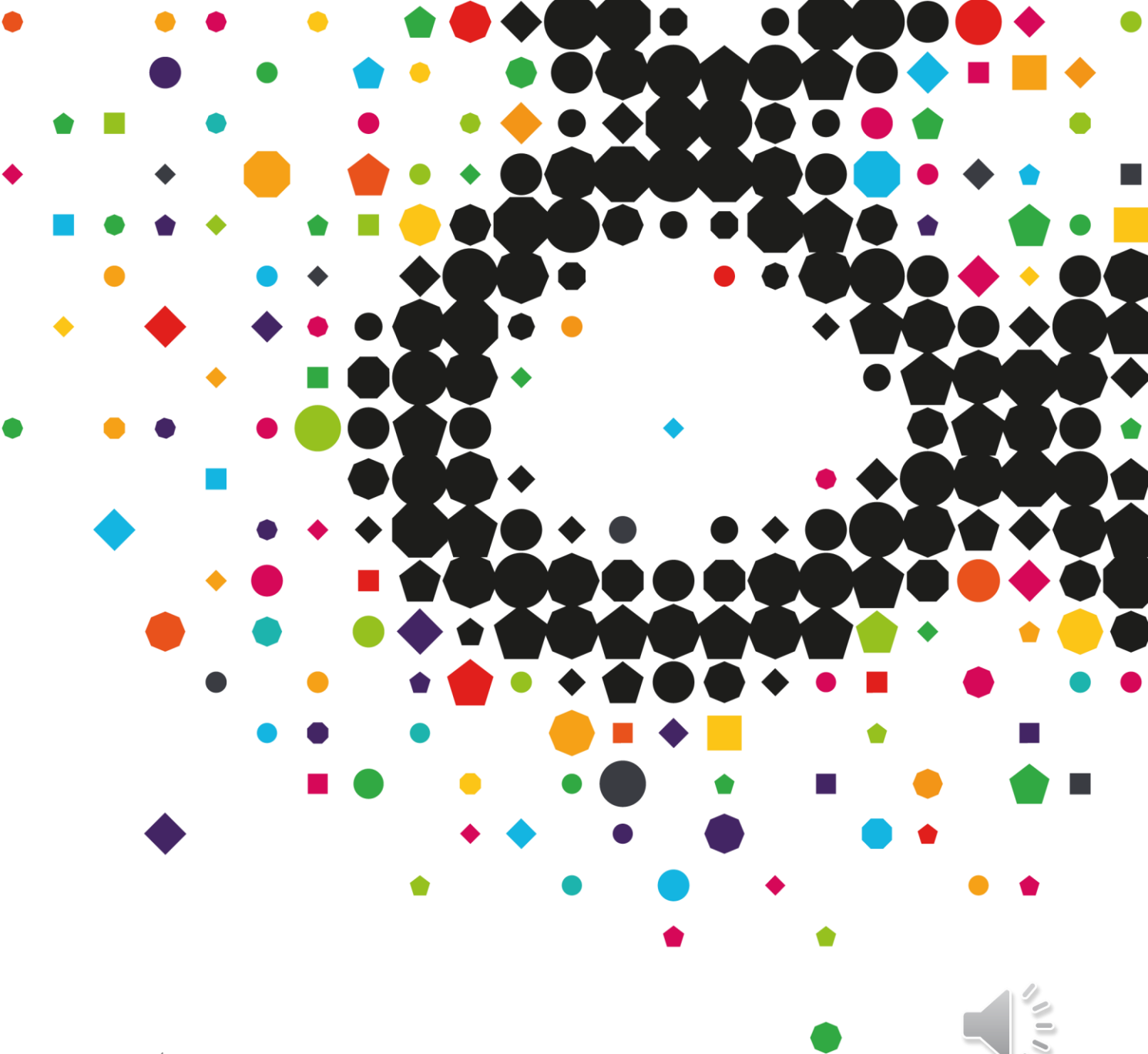


# Getting started on EPA Pro

*Starting your EPA Journey*



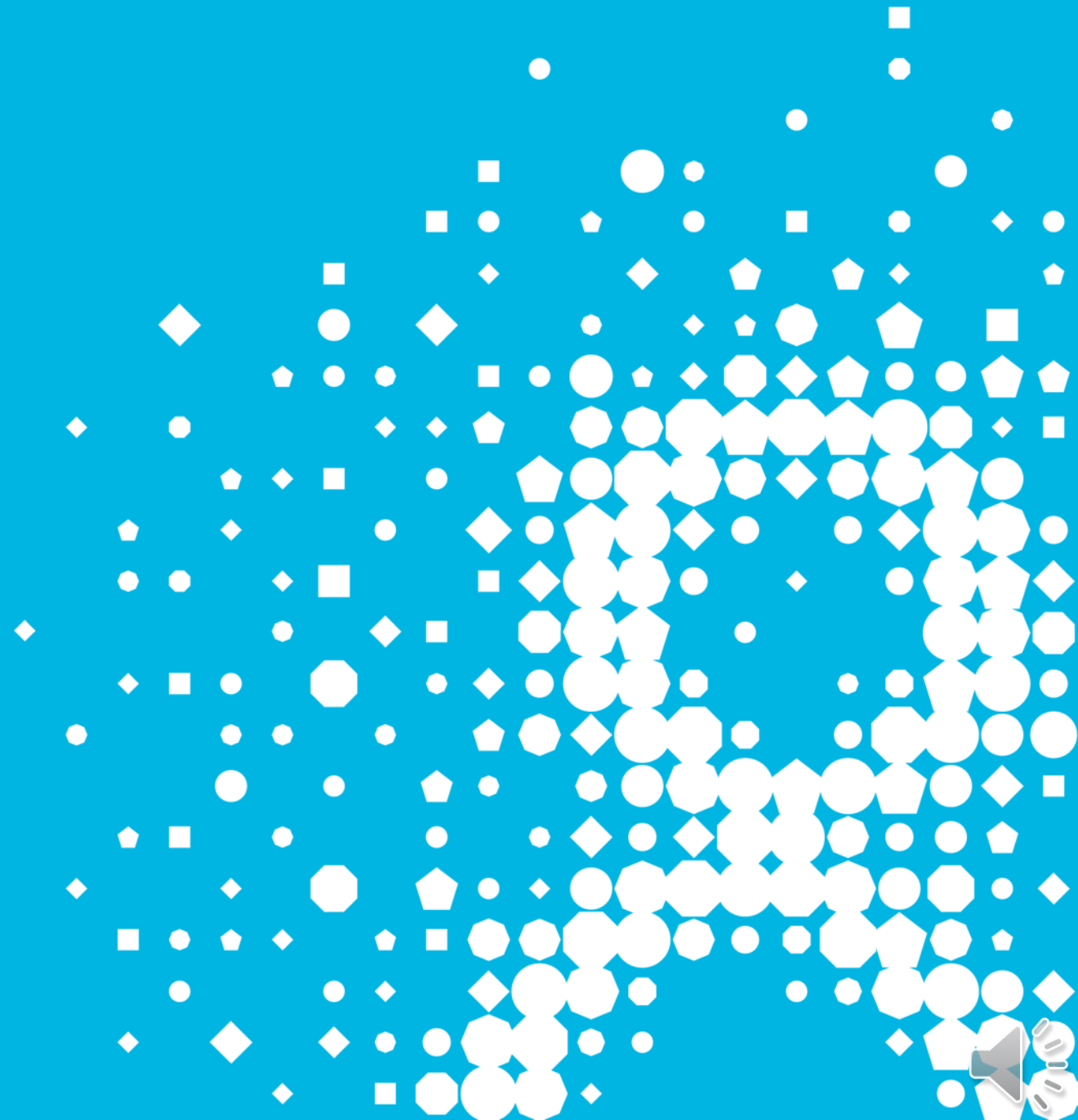
# Contents

- **Welcome to EPA Pro**
- **Navigating your Dashboard**
- **Your Main Menu**
- **Notifications**
- **Setting up your Provider Profile**
- **Registering your Apprentices**
- **Employers**
- **Accessing Support Resources**
- **Support Routes**



# Welcome to EPA Pro

*EPA Pro is our new EPA service delivery platform bringing the end-to-end EPA journey, from registration to results, all in one place.*





# Please familiarise yourself with our 8 Stage Journey for EPA



We will focus on Stage 3 in this presentation

Access our detailed 8 Stage Journey here....

<https://www.cityandguilds.com/apprenticeships/endpoint-assessment-service/epa-pro>



# epa.cityandguilds.com

- Once approved with us (or migrated as an existing customer) your agreed Primary Contact will receive an invitation to create a password for EPA Pro



*Username is your email address  
You can reset your password easily if you forget it!*



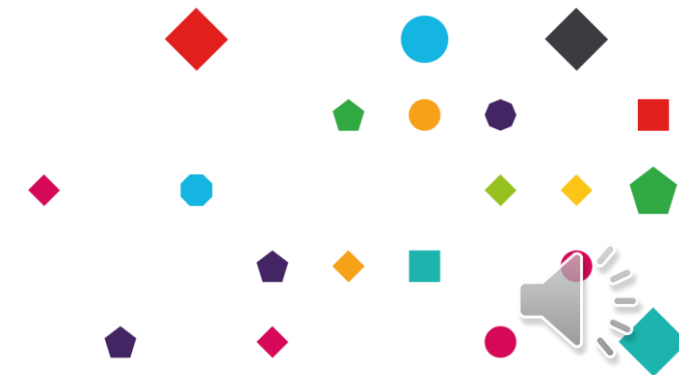
# The Dashboard

When you log onto EPA Pro you will see this screen first, which gives you a snapshot of your Apprentices journey:

- New Apprentices Enrolled
- Gateway Completed
- New Results
- New Certificates

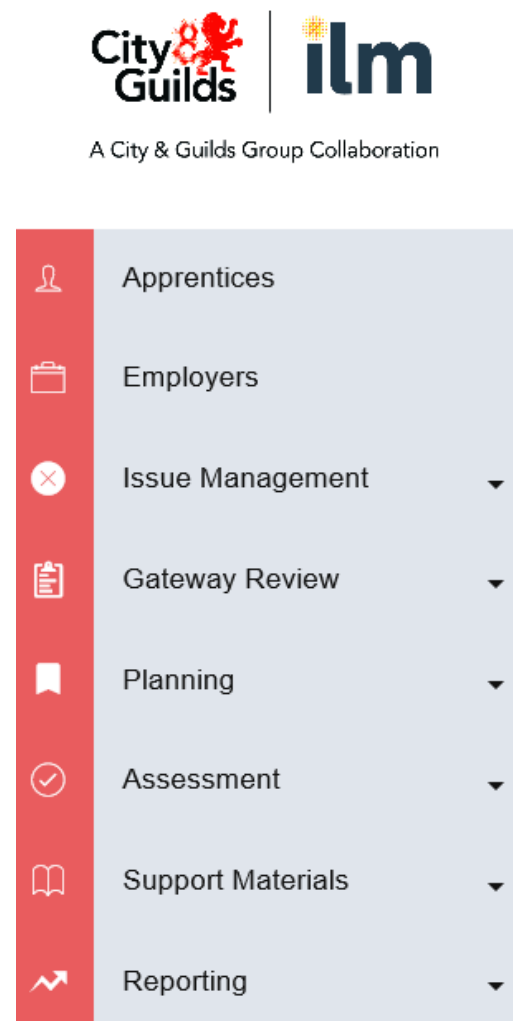
The dashboard interface includes a navigation menu on the left with the following items: Apprentices, Employers, Issue Management, Gateway Review, Planning, Assessment, Support Materials, and Reporting. The main content area features a 'Dashboard' header, a 'Latest News' section with 'No News Available', and four key performance indicators (KPIs) highlighted with a red border: 'New Apprentices This Week' (3), 'Completed Gateway This Week' (2), 'New Results This Week' (0), and 'New Certificates This Week' (0). Below these is a 'Calendar' section for January 2021, showing dates from 27th to 16th. A red arrow points from the 'Reporting' menu item to the calendar. The URL at the bottom is <https://epa-demo.cityandguilds.com/users/TrainingProvider/dashboard>.

Your calendar view will be populated with all the EPA activity for your Centre



# The Menu

- On the left-hand side of the screen, you will see the main menu, this will allow you access to all the necessary actions on EPA Pro.
- We will go into more detail on some of these functions in this guide.
- We highly recommend you familiarise yourself with the menu and what is in each drop-down box as this will help you to navigate around the system.



# Notifications

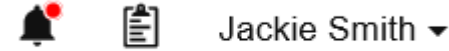
Next to your Username in the top corner, you will see the Notifications bell:

This will inform you of all notifications regarding your apprentices, stages such as:

- Gateway due or completed
- Results available
- Assessments planned

Clicking onto a notification will take you to the record for that apprentice

Notifications can be removed from this list as you wish either by marking as read or deleting them



### Notifications

[Mark all as read](#) [Delete all read](#)

- Certification completed for Karen Libby**  
1 hour ago  
[Mark as read](#) [Delete](#)
- 9494-703 Professional Discussion result available for Karen Libby**  
1 hour ago  
[Mark as read](#) [Delete](#)
- 9494-702 Presentation & Interview result available for Karen Libby**  
1 hour ago  
[Mark as read](#) [Delete](#)
- 9494-701 Practical Observation result available for Karen Libby**  
1 hour ago  
[Mark as read](#) [Delete](#)
- David Smith's gateway has been approved.**  
4 hours ago  
[Mark as read](#) [Delete](#)
- Karen Libby's gateway has been approved.**  
4 hours ago  
[Mark as read](#) [Delete](#)



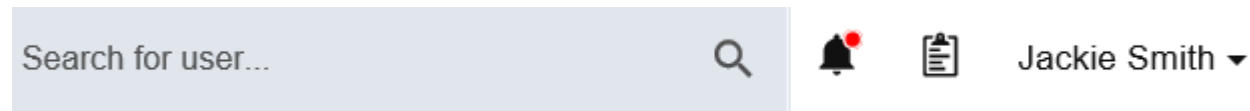


# Editing profiles

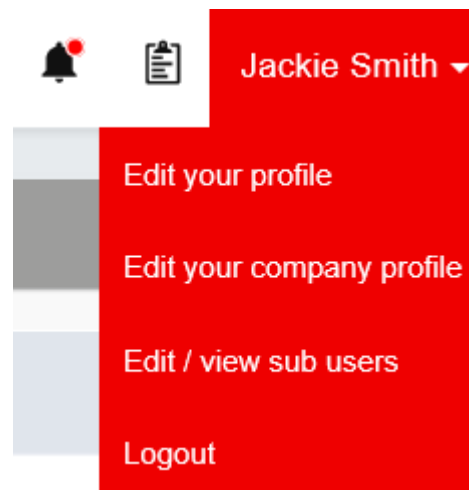


# Editing / Adding Profiles

- Once approved for delivery for the first time or for existing customers once you are migrated to EPA Pro you will be set up with a Provider Primary user.
- In the top right-hand corner of the home screen, you will see your Username



- From here you can do the following:



# Editing Your Profile

- 'Edit Profile' provides a chance for you to check your details are correct
- The Security tab is for you change / update your password to the system
- We would also recommend you add your electronic signature here, as this will save time for you with the Gateway forms a little later!

**Edit My Profile**

User Details | Security

**User Details**

Username \*  
Adele.Smith@cityandguilds.mailinator.com

Given Name \*  
Adele

Email \*  
Adele.Smith@cityandguilds.mailinator.com

Family Name \*  
Smith

Signature Name  
Signature Name

Telephone \*  
08445430000

Signature  
[Signature Field]

Clear Signature

Update My Profile



# Stage 3. Registering your apprentices

*Add your apprentices to start  
their EPA journey*



# Registering your Apprentices











Apprentices can be added by selecting Apprentices from the main menu:

- One-by-one 
- Or in bulk 






A City & Guilds Group Collaboration


-  Apprentices
-  Employers
-  Issue Management
-  Gateway Review
-  Planning
-  Assessment
-  Support Materials
-  Reporting






A City & Guilds Group Collaboration

### Manage Apprentices

Search...  Filter by Standard  Filter by Specialism  Filter by Employer  On Programme  

ULN	Given Name	Family Name	Email	Standard	Specialism	End Point Assessor	Provider	Date Added	Status	Edit	Profile
1111111114	David	Smith		9494-12 Level 3 Customer Service Specialist		Noel Smith	Provider 1	04/09/2020	Active		

### Bulk Upload

Apprentice  Employer

Action Type:

Please Upload a .csv file:

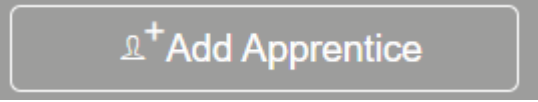


- Create Apprentice
- Update Apprentice
- Change Of Circumstance
- Start New Programme
- Create Employer
- Download Example Csv
- Assessment Centre ID Finder
- Employer ID Finder
- Ethnicity Codes
- External Standard ID Finder
- Industry Sector ID Finder
- Specialism ID Finder



# Adding your Apprentices one by one

To add an individual apprentice, select Apprentices from the main menu on the Dashboard, then Add Apprentice.

 + Add Apprentice

[Add Apprentice](#) [Manage Apprentices](#)

Apprenticeship Details | User | Apprentice Details | Workplace Details

**Apprenticeship Details**

Provider \*  
Provider 1

Employer  
Select employer

Standard \*  
Select standard

Specialism  
Select standard first

**Apprenticeship Dates**

Expected Start Date \*  
DD/MM/YYYY

Expected Date Ready for EPA \*  
DD/MM/YYYY

Expected Completion Date  
DD/MM/YYYY

**On Programme Assessor**

Assessor Name  
Assessor Name

Assessor Phone Number  
Assessor Phone Number

Work through the four tabs, ensuring all mandatory fields marked with an (\*) are completed

To allow the apprentice access toggle Allowed login methods to green

Allowed login methods



Login using username/password

The Workplace Details is the address where the ESFA Certificates will be sent to

Apprenticeship Details | User | Apprentice Details | Workplace Details

**Workplace Details**

Company Name \*  
Company Name

Site Name  
Site Name

Address Line 1 \*  
Address Line 1

Address Line 2  
Address Line 2

**Workplace Mentor**

Mentor Name  
Mentor Name

Job Title  
Job Title

Telephone  
Telephone

Email  
Email



# Bulk uploading your Apprentices

To bulk upload your apprentices, Select Apprentices in the main menu and then select Import Apprentices

 Import Apprentices

## Bulk Upload

Apprentice | Employer

Helpers ▾

Action Type:  
Create Apprentice ▾

Please Upload a .csv file:  
Choose Choose a file... Reset

Helpers ▾

- Download Example Csv
- Documentation
- Assessment Centre ID Finder
- Employer ID Finder
- Ethnicity Codes
- External Standard ID Finder
- Industry Sector ID Finder
- Specialism ID Finder

This will open the Bulk Upload section. From here select the required Action Type, Choose your file and upload



*Remember the Helpers!*

*For all bulk upload functions in EPA Pro, if you access the 'Helpers' drop down you'll be able to download an example .csv file giving you the format required and example content.*



# Hints and tips for adding Apprentices



Apprenticeship Details   User   Apprentice Details   **Workplace Details**

## Workplace Details

Workplace Details is the address used to send ESFA Certificates

In the user details tab please use an email address for username

### User Details

Username \*

Email \*

### Reasonable Adjustments

This is where you will let us know of any reasonable adjustments the apprentice requires such as additional time etc

There must be at least 366 days between the *'Expected start date'* and the *'Expected date ready for EPA'*

### Apprenticeship Dates

Expected Start Date \*

Expected Date Ready for EPA \*

Expected Completion Date

### Allowed login methods



Login using username/password

Toggle green to give apprentices access to EPA Pro





# Apprentice View – The Dashboard



Notifications/Actions

Personal profile

Test Apprentice ▾

- Edit your profile
- View your progress
- Logout

Calendar of EPA events

Return to your account

Search for user... Meera Blackmore ▾

City & Guilds | ilm  
A City & Guilds Group Collaboration

Support Materials

Dashboard

Latest News  
No News Available

Calendar  
September 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

epaPRO.

Preloaded support materials

Test Apprentice - On Programme - 9494-12 Level 3 Customer Service Specialist

View Programme ▾

Overview Profile

Registration Gateway Planning Assessment Certification

Registered on 27/11/2020 Submitted on 27/11/2020 Completed Next Assessment: 15/02/2021

9494-701 Practical Observation	15/02/2021 09:00	9494-701 Practical Observation	Pending		
9494-702 Presentation & Interview	16/02/2021 09:00	9494-702 Presentation & Interview	Pending		
9494-703 Professional Discussion	17/02/2021 09:00	9494-703 Professional Discussion	Pending		



40 Complete

Progress View



# Apprentice View

Under Support Materials and then Welcome pack we have a short presentation 'Introduction of the Apprentice Journey in EPA Pro'.

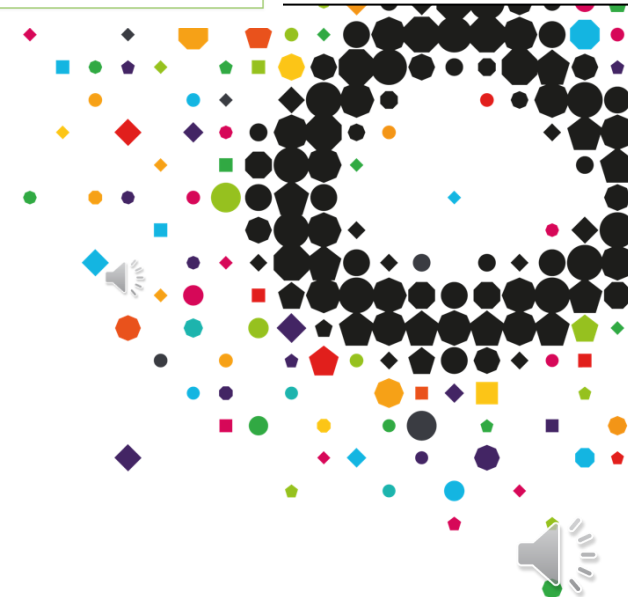
Type	Title	Description	Updated	View
	Welcome pack	A useful document to share with colleagues and partners to introduce our end-point assessment service and the processes and platforms you will need to use. You will have received this Welcome pack when you were first approved for end-point assessment delivery.	18/12/2020 14:35	Open
	Introduction to the Apprentice Journey in EPA Pro	A short presentation showing the journey for an apprentice in EPA Pro; from accessing the platform and support resources, following their progress through EPA, to final EPA events, results and final certification.	27/08/2020 11:16	Open

This Presentation will give the Training Provider an understanding of the journey for an apprentice in EPA Pro; from accessing the platform and support resources, following their progress through EPA, to final EPA events, results and final certification.



A City & Guilds Group Collaboration

Your City & Guilds  
apprenticeship journey  
supported by  
**epaPRO**



# Adding your employers

It is not a mandatory requirement for Employers to have access to EPA Pro. It is at the discretion of the Training Provider.

ESFA Certificates will be sent to the address provided in Workplace Details under Apprentice.



# Adding Employers

- In the same way as adding your apprentices you can add employers individually or as a bulk upload – Follow the steps for each process;

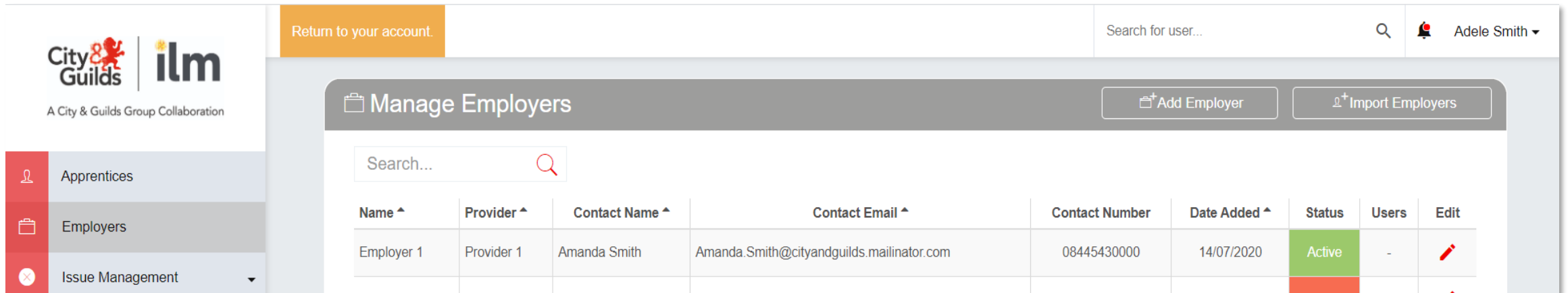
- one-by-one using




- Or in bulk using



- You can edit employers once they are set up by clicking on the pencil icon under Edit



The screenshot shows the "Manage Employers" interface. At the top left, there are logos for "City & Guilds" and "ilm" with the text "A City & Guilds Group Collaboration". Below the logos is a navigation menu with three items: "Apprentices", "Employers" (which is highlighted), and "Issue Management". To the right of the navigation menu, there is a search bar with the text "Search for user...", a magnifying glass icon, and a user profile icon for "Adele Smith". Below the search bar, there is a header for "Manage Employers" with two buttons: "Add Employer" and "Import Employers". Below the header, there is a search bar with the text "Search...". Below the search bar, there is a table with the following columns: "Name", "Provider", "Contact Name", "Contact Email", "Contact Number", "Date Added", "Status", "Users", and "Edit". The table contains one row of data:

Name ^	Provider ^	Contact Name ^	Contact Email ^	Contact Number	Date Added ^	Status	Users	Edit
Employer 1	Provider 1	Amanda Smith	Amanda.Smith@cityandguilds.mailinator.com	08445430000	14/07/2020	Active	-	

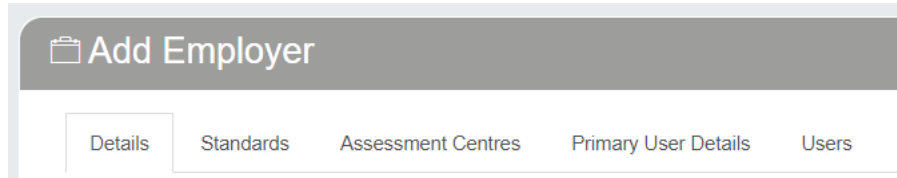


# Adding an Employer one by one

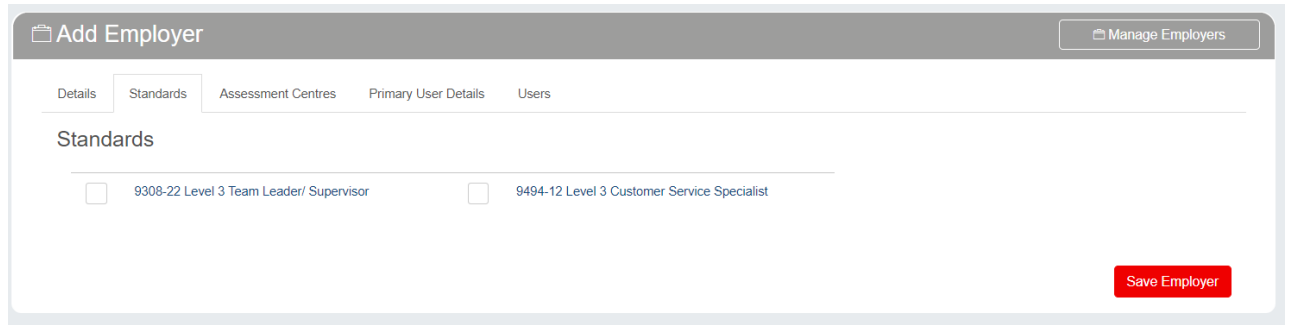
Select Employers from the main menu, then select Add Employer



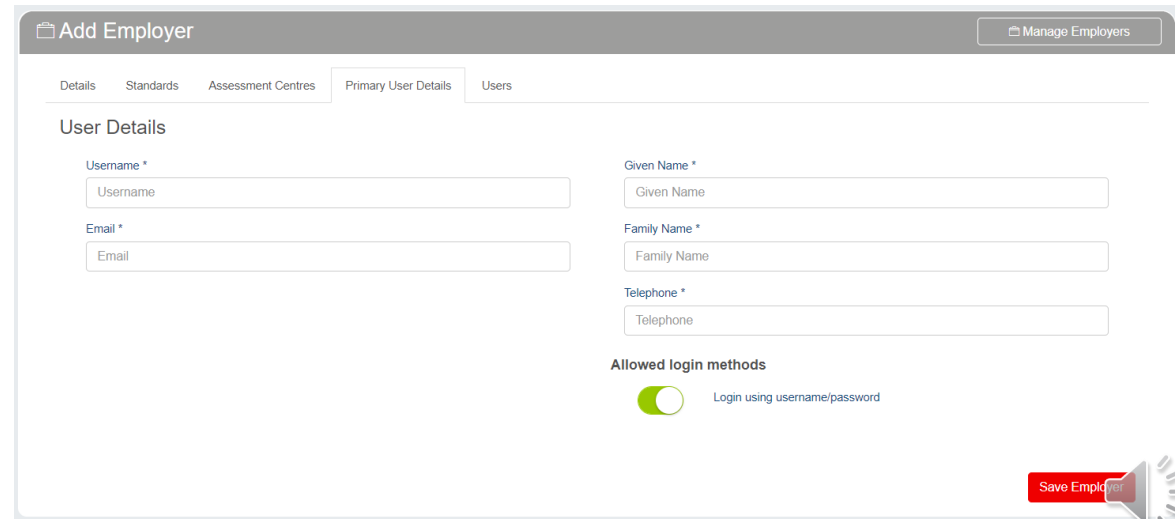
Work your way through each tab, completing the mandatory fields (*assessment centres can be left blank*)



On the standards tab, you'll see any standards you're approved to deliver, select which ones relate to that employer

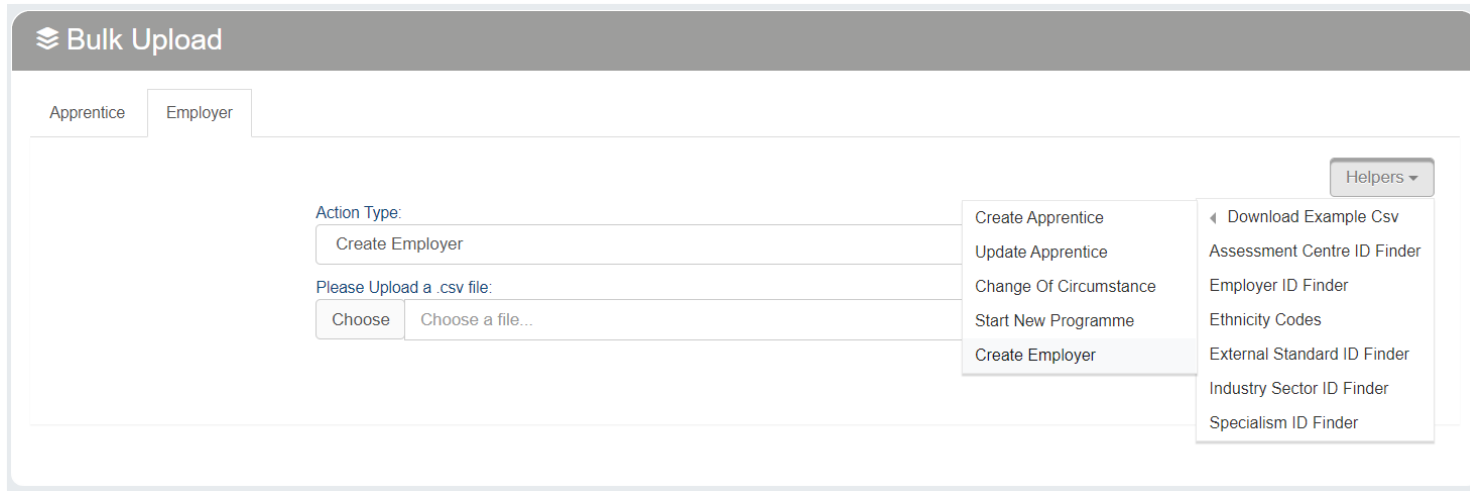
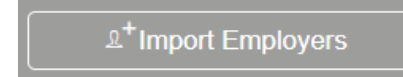


In the Primary User tab, toggle Allowed login methods to green if you want to give the Employer access to EPA Pro.



# Bulk Import of Employers

Select Employers from the main menu, then select Import Employer



This will open the Bulk Upload section. From here select the required Action Type, Choose your file and upload



*For all bulk upload functions in EPA Pro, if you access the 'Helpers' drop down you'll be able to download an example .csv file giving you the format required and example content.*

Once populated with your data simply upload the .csv file

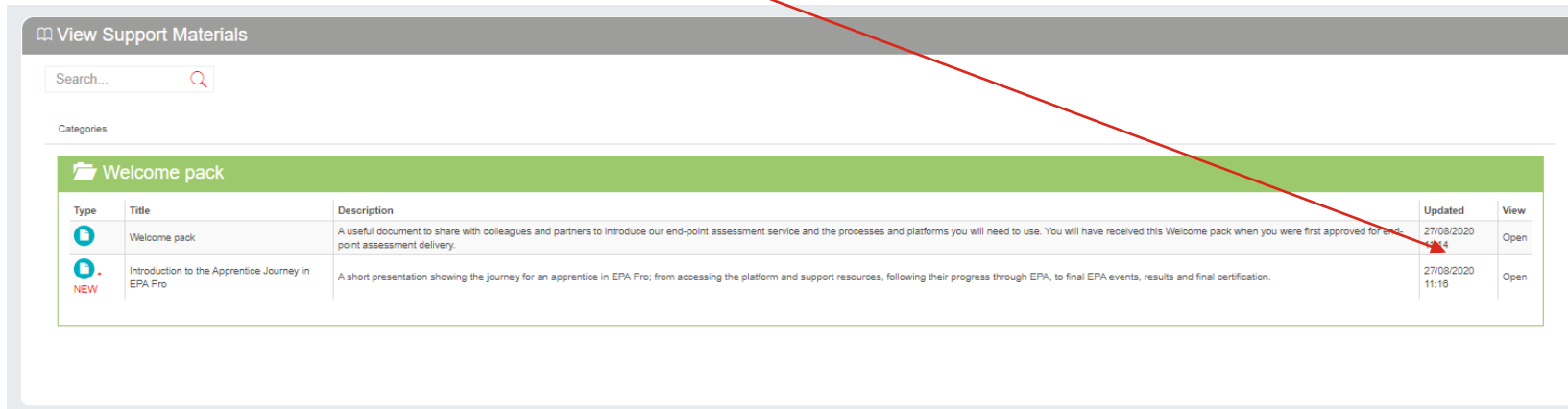
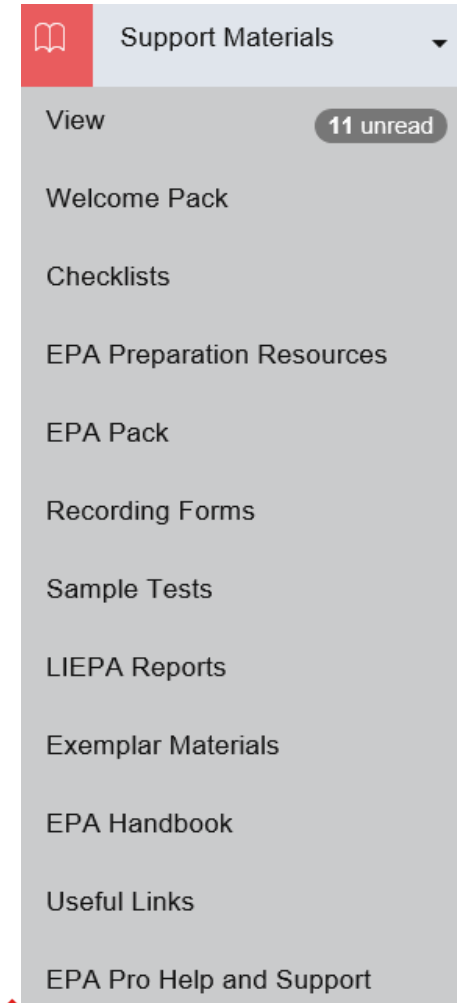
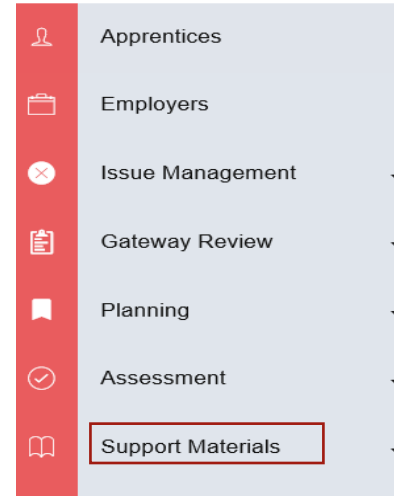


# Support resources



# Support Resources

- Access Support Materials on the main menu
- Selection will provide a drop down of all available resources
- A wealth of support materials all accessed in one place
- Simply click here to open





# What support materials are available?

## End-point assessment preparation and guidance

### Suggested resources

End-point assessment gives you a few ways to show what you've learnt and that you've picked up all the skills, [knowledge](#) and behaviours your job needs. It's the last part of your apprenticeship and we want you to pass.

The online content below can help you get ready so that you can feel more confident and have the best chance to demonstrate what you've learnt. These free resources include short videos, articles, blogs and more, gathered from a variety of online sources.

Some of these assessment skills may not be relevant for your end-point assessment, so make sure you know which assessment methods are required for your standard. We recommend using these resources to supplement the information and support provided by your training provider/employer.

#### Performing under pressure

- [3 tips to boost your confidence](#) (Video, TED-ed)
- [13 secrets for performing better under pressure](#) (Article, Business Insider)
- [5 ways to beat pre-performance nerves](#) (Article, Teens Health)
- [7 ways to combat anxiety](#) (Video, MindTools)

#### On the day

- [Exercise and stress: Get moving to manage stress - Mayo Clinic](#)
- [The benefits of a good night's sleep](#) (Article, TED-Ed)
- [Six ways students can prepare for success on the day of an exam](#) (Article, The Guardian)
- [Tips on preparing for exams - NHS \(www.nhs.uk\)](#)

#### Communication

- [Important active listening skills and techniques](#) (Article, The Balance)
- [10 steps to effective listening](#) (Article, Forbes)
- [Active listening](#) (Video, TEDxYouth)

#### Professionalism

- [The importance of being punctual in the workplace](#) (Article, WiseStep)
- [Professional etiquette](#) (Article, A First Job)
- [How to make a great first impression](#) (Video, MindTools)

City & Guilds  
A City & Guilds Group Business

## Level 2 Customer Service Practitioner

### EPA exemplar resources: Professional discussion

08:58

Level 2 Customer Service Practitioner EPA exemplar materials					
Skill scan A					
Knowledge					
Module	Standard	What do I need to know?	Pass criteria	Distinction criteria	Assessment method
Knowing your customers	1. Understand who customers are.	<ul style="list-style-type: none"> <li>Who my customers are.</li> <li>Who my organisation's customers are.</li> <li>A description of the different types of customers.</li> </ul> <input type="checkbox"/> Yes <input type="checkbox"/> No	An explanation of the difference between internal and external customers in the context of my organisation. <input type="checkbox"/> Yes <input type="checkbox"/> No	An explanation of the importance of building good customer relationships to the organisation. <input type="checkbox"/> Yes <input type="checkbox"/> No	Professional discussion*
	2. Understand the difference between internal and external customers.	<ul style="list-style-type: none"> <li>What an internal customer is.</li> <li>What an external customer is.</li> <li>Who my organisation's internal customers are.</li> <li>Who my organisation's external customers are.</li> <li>What the difference is between internal and external customers to the organisation.</li> </ul> <input type="checkbox"/> Yes <input type="checkbox"/> No	A description of the specific needs of different customers, including those protected under current Equality law. <input type="checkbox"/> Yes <input type="checkbox"/> No	An explanation of the difference in the way internal and external customer relationships are managed. <input type="checkbox"/> Yes <input type="checkbox"/> No	
	3. Understand the different needs and priorities of your customers and the best way to manage their expectations, recognising and knowing how to adapt style to be highly effective.	<ul style="list-style-type: none"> <li>The importance of balancing the needs of both the organisation and its customers.</li> <li>The different needs of my customers.</li> <li>The different priorities of my customers.</li> <li>The specific needs that customers may have, including those that are protected under current equality law.</li> </ul> <input type="checkbox"/> Yes <input type="checkbox"/> No	An explanation of when and how to adapt my service approach to meet the needs and expectations of customers. <input type="checkbox"/> Yes <input type="checkbox"/> No	An explanation of the importance of balancing the needs of both the organisation and its customers. <input type="checkbox"/> Yes <input type="checkbox"/> No	

## What to expect from the portfolio showcase

### Apprentice notes and guidance

#### The portfolio showcase

A portfolio showcase is a collection of evidence that shows you have met the requirements for assessment. As the assessment is graded, it is important that, as well as showing that you have met the requirements, you present your best work.

This guidance covers the process of selecting evidence for the portfolio and submitting the portfolio for end-point assessment (EPA).

A portfolio showcase has as its content, your best work. It will contain a variety of evidence to show you have met the pass criteria, and possibly the distinction.

The evidence in a showcase portfolio can vary and be for example:

- Reflective account** – reflection is very important in a showcase portfolio as it allows you to consider carefully what you have carried out in the workplace and how well you have done it. A reflective account allows you to reflect on the tasks you have carried out, how, why and when you did so and to explain the evidence you are presenting in your portfolio showcase, and the reasons for doing so.
- Product evidence** – products can be varied, and the product evidence presented will depend on the occupational area. In some occupational areas it will be for example letters or memos, but product evidence will vary according to your role.
- Observation** – an observation is where you will be observed in the workplace carrying out a naturally occurring activity. This observation will be a statement of what has been seen and must not have been assessed against the standards. This observation can be written or recorded. Confidentiality and data protection requirements must be adhered to.
- Witness testimony** – can be in many forms. It can be in writing or a recording and again confidentiality and data protection requirements must be adhered to. It is where a witness will provide an account of what you have done in your job role. It is likely to confirm the authenticity of the evidence or reflective account presented by you in the portfolio showcase. A witness can range from a manager to a customer and will vary according to the occupational area.
- Recorded discussion** – this can be an audio or videoed discussion with you reflecting on your own work or discussing certain tasks/topics with another, eg your manager. This evidence must be authenticated as your own work.

#### Selecting evidence

Before selecting the evidence to form the portfolio you should review the assessment requirements given in the Level 2 Customer Service Practitioner (9794-12) EPA pack for the apprenticeship. This will state the requirements to be covered by the portfolio and may also include guidance on:

- the type of evidence that can be presented (see above)
- when the showcase evidence should be gathered from – the period of time from which the evidence should have originated (usually this will be towards the end of the apprenticeship).

## End-point assessment

### A checklist for apprentices

We want you to be successful in your apprenticeship so we've put together a handy checklist to help us on top of the steps in getting to, and passing, your end-point assessment (EPA).

The list isn't everything you need to do and it's not specific to your apprenticeship so we've left some rows for you to add in your own ideas. This is an aid and doesn't replace the advice and instruction from your employers and your tutors and providers.

Find out more about EPA on our YouTube channel [youtube.com/c/cityandguilds](https://www.youtube.com/c/cityandguilds) – especially [What is end-point assessment \(EPA\)?](#) and [Get to know your EPA preparation tool](#).

Before EPA	✓	Comments
During your on-programme training, you may have to complete tasks, projects and coursework – make sure you meet the deadline(s) and deliver at the right quality	<input type="checkbox"/>	
You must log all your 20% off-the-job training. Your tutor or your employer has to authorise your records	<input type="checkbox"/>	
Make sure you've registered for our online EPA preparation tool if you're taking your EPA with City & Guilds. It helps build your confidence for assessment. Your provider will register you, so you'll get an email asking you to sign up – this will come about three months before your EPA.	<input type="checkbox"/>	
Talk to your tutor if you need special arrangements for your assessment, for example extra time for an exam because of a reading difficulty. They'll arrange what you need with the independent assessors	<input type="checkbox"/>	
Depending on the grades you've already got in English and maths, you might have to work on your literacy and numeracy to reach a level set in the apprenticeship. No one can move onto EPA without having met the English and maths requirements of their apprenticeship standard	<input type="checkbox"/>	
Your tutor will give you a summary of the EPA process – from the start right through to getting your apprenticeship certificate at the end. Ask them for this if you don't have it	<input type="checkbox"/>	
If you have any assessments or projects that you need to take into an EPA, make sure your tutor or employer explain what's needed and that you stay on track to get these finished and ready	<input type="checkbox"/>	



# Support and Feedback



Contact us via:  
[centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)



08844 543 0000 (option 5)



Webchat on our contact us page  
[www.cityandguilds.com/help/contact-us](http://www.cityandguilds.com/help/contact-us)

We'd love your feedback on how we can improve through our feedback link found either on

- <https://www.cityandguilds.com/apprenticeships/endpoint-assessment-service>
- or in the useful links section in EPA Pro

## Feedback on our EPA Service Delivery

We'd love to hear your feedback and ideas on how we can improve our EPA Service Delivery, how can we make your life easier?

 Let us know 



# Thank you

