



# Insight#9

## Opportunities for employers in new apprenticeships standards.

Hello. We're just setting up and will start shortly. You should be able to hear the presenters sound checking.

Having problems? Contact  
[FECustomerTrainingEvents@pearson.com](mailto:FECustomerTrainingEvents@pearson.com)  
OR **0845 373 0114**





# Housekeeping

# Housekeeping

## For technical support during the event

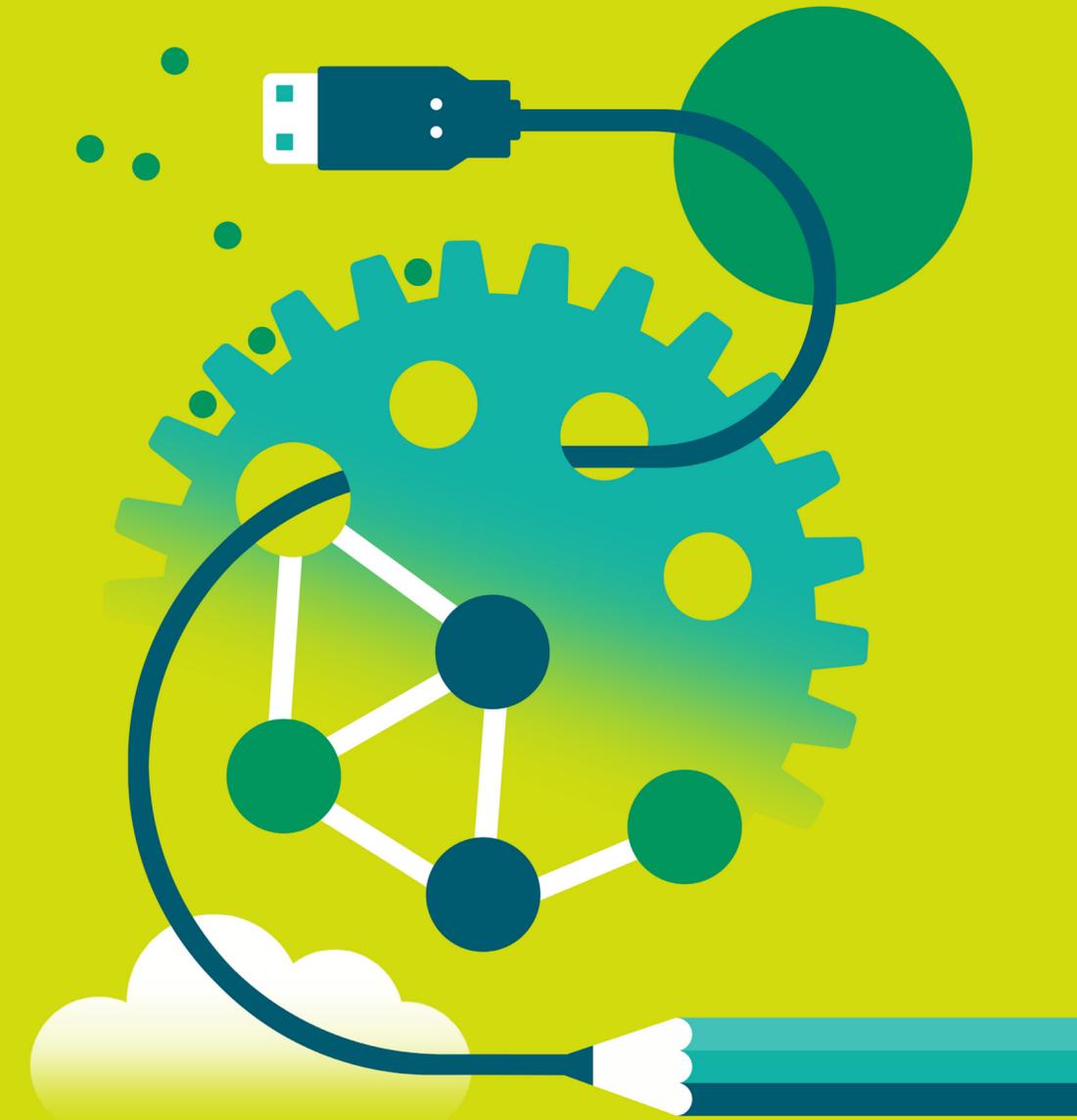
Use the chat window and our support team will respond.

## We'll go into more detail on topics later in the series

We'll run further events every few weeks for as long as people find them useful.

Slides will be sent you post-event

[quals.pearson.com/apprenticeships](https://quals.pearson.com/apprenticeships)



# Interacting

**There will be a Q&A session at the end of the event.**

But your microphones are off by default.

**You can ask a question at any time using the chat window**

We won't answer immediately but will pause between sections to summarise key points of interest.

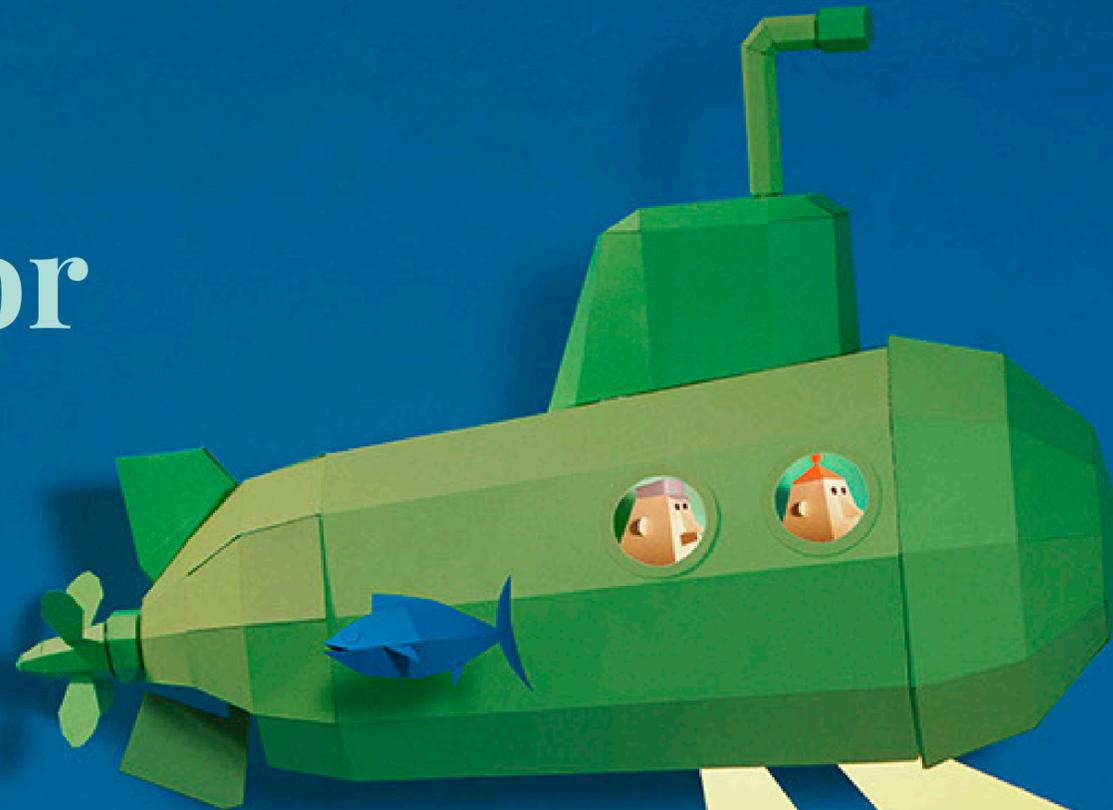
Due to time constraints, we may not be able to answer all your questions during the webinar. But we will make a note of them and try to answer most of it.



# Insight webinars for apprenticeships.

## #9 A Guide to Reclaiming your Levy from the Apprenticeships System

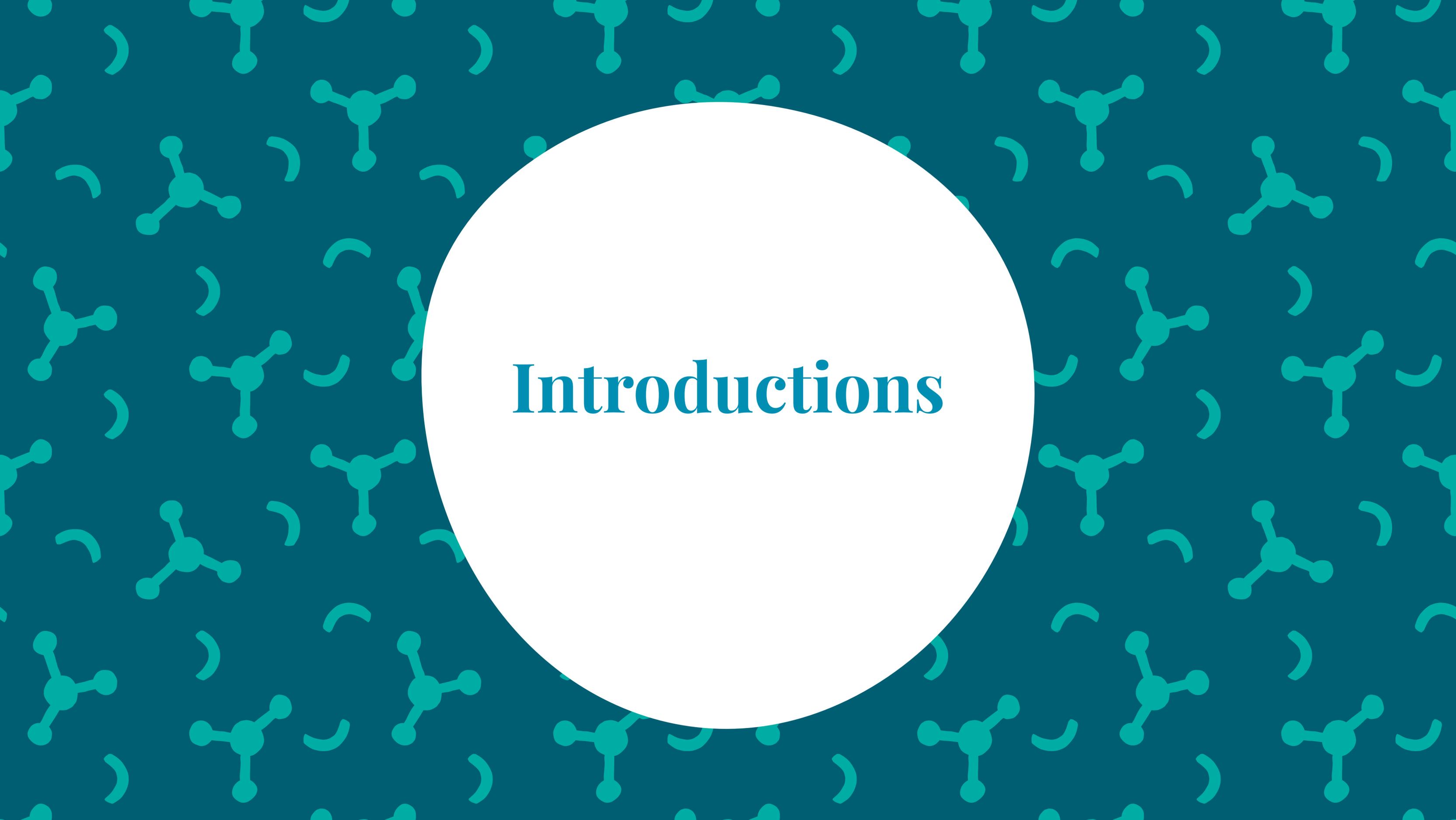
20 September 2017



# Today's schedule

- 1 **Background** – reasons for and purpose of today
- 2 **The essentials** – the view from human resources
- 3 **The essentials** – the view from finance
- 4 **Inside government gateway** - a worked example
  - A Set-up – **users**
  - B Set-up – **finance**
  - C Set-up – **training programmes**





# Introductions

# Who are Pearson

**We're a levy-payer  
In the UK we employ  
3,200 levy-liable staff.**

**We're also a leader in education.  
We're the UK's largest awarding  
organisation with:**

- More than 100,000 apprenticeship registrations per year
- Approximately 1m BTEC learners per year

# Your presenters



**Neil Ingoe**

Head of Marketing  
Event Host



**Anne Ashworth**

Head of Internal  
Apprenticeships



**Viren Nehru**

Director of Employment Tax

# Background

- At present large employers ie those with a wage bill of over £3M a year are liable to pay an apprenticeship Levy with a 10% contribution from the government.
- The Government requires all employers that seek to have apprentices to pay for them via a digital account. Once this account is set up with the HMRC then employers can access funding through the Apprenticeship Service to pay for apprenticeship delivery.
- By the end April 2019 all non-paying levy employers are to use the same method of paying for apprentices ie through a digital account.

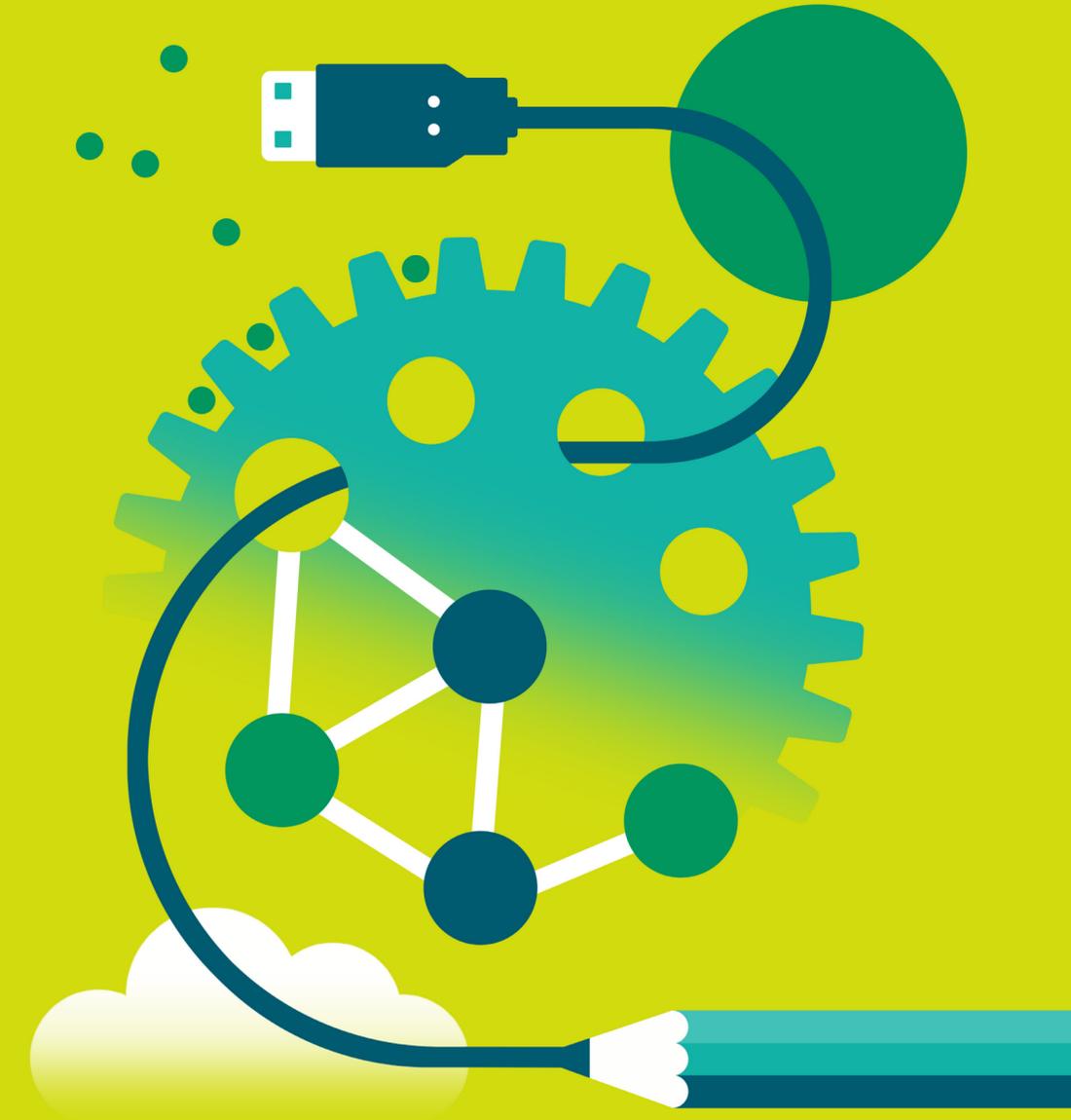
# Working with the Apprenticeship System

- Currently it is only **Levy-paying employers** and training providers that engage with this system.
- Company must have a UKPRN to use the system:
  - by being on ROATP, or
  - being a registered employer with the ESFA.
- The system can be used in two ways:
  - the employer initiates all of the transactions or
  - the employer passes certain tasks over to their provider and they use the system.



# What the system does

- 1 Confirm acceptance of ESFA agreements
- 2 Register and maintain your PAYE schemes
- 3 Find providers
- 4 Manage apprentice information
- 5 Track spend of levy monies





**The essentials  
– the view  
from HR**

# Key priorities for successful implementation

## Planning is the key

- Project approach – cross-business and enabling functions
- Integration of systems
- Workforce development
- Procurement and partnership development
- Quality assurance



# Top Five Tips

- 1 Plan thoroughly across the business.
- 2 Map your Learning and Development to the apprenticeship standards.
- 3 Work closely with Finance so that they become experts in the Apprenticeship System.
- 4 Create a cohesive, simple and clear communication strategy for the business.
- 5 Use your Leadership team and senior managers to 'sell' apprenticeships into the business with the correct messages.



**The essentials  
- the view from  
the finance**

# Overview of finance perspective

## Apprenticeship Levy – quick overview

- Payable where annual paybill exceeds £3m subject to a £15k allowance.
- Rate of levy is 0.5% and paid to HMRC through payroll submissions.
- Apprenticeship Levy is governed by the same regimes covering PAYE.
- HMRC will allocate the funds proportionately to the devolved Nations.



# Key stakeholders

Who are your key contacts within your organisation in order to make a success of Apprenticeships System?

<b>Payroll</b>	<b>Company Secretarial</b>
<b>Tax</b>	<b>Procurement</b>
<b>Finance</b>	<b>Legal</b>
<b>HR</b>	<b>Technology</b>

# Top four tips

- 1 First priority is compliance with the Levy
- 2 Understand your internal governance and controls
- 3 Identify your stakeholders
- 4 Establish processes





**Inside the  
government  
gateway  
A worked  
example**



*Set-up finance*

# Set-up – finance

**GOV.UK** Manage apprenticeships

**BETA** This is a new service – your [feedback](#) will help us to improve it.

[← Back](#)

## Have you used this service before?

Yes, I've used this service before

No, this is my first time

[Continue](#)

# Set-up – finance

## Your organisations and agreements

Add new organisation

Add each organisation that will contract with your training providers.

There is no restriction on the number of [connected organisations](#) you can add.

Organisation	Agreement	Spending status	
PEARSON PLC		Spending enabled	<a href="#">View</a>

[Remove an organisation from your account](#)

# Set-up – finance

## PAYE schemes

Add new scheme

Funds will credit your account from any PAYE schemes you add. No funds will credit your account until May 2017.

You must add all PAYE schemes that your apprentices will be paid through.

Added PAYE schemes	English %	
120/	97.605 %	<a href="#">Details</a>
120/	94.298 %	<a href="#">Details</a>
321/	98.493 %	<a href="#">Details</a>
321/	90.939 %	<a href="#">Details</a>
321/	95.724 %	<a href="#">Details</a>



**Set-up - users**

# Steps to take to be ready for use

- The system needs to be set up for users and administrative access
- The ESFA agreement needs to be approved against the correct legal entity
- The PAYE schemes need to be loaded into the system that cover the areas of the business in the UK/England that are going to be affected by the apprenticeship programme.

**Tip:** Have a key person within finance that is conversant with the system, understands the requirements from HMRC and PAYE schemes. Work closely with them. Our person is Viren Nehru

# Setting up users

[Home](#) [Finance](#) [Apprentices](#) **[Your team](#)** [Your organisations and agreements](#) [PAYE schemes](#)

[Home](#) > [Your team](#)

## Your team

[Invite a new member](#)

Invite members, control what they can do, remove members and cancel or resend invitations.

Name	What they can do	Status	
Viren Nehru	Accept agreements, view information and manage PAYE schemes, organisations, apprentices and team members	Active	<a href="#">View</a>
anne ashworth	Accept agreements, view information and manage PAYE schemes, organisations, apprentices and team members	Active	<a href="#">View</a>

# Setting up users

## Create invitation

Invite somebody to access this account.

### Email

An invitation will be sent to this email address

### Full name

### Team member access

Choose the level of access this user can have.

- View information but can't make changes
- Add apprentices and view information
- Accept agreements, view information and manage PAYE schemes, organisations, apprentices and team members

Send invitation



**Set-up  
- training  
programmes**

# Set-up – training – finding providers

The system can be used for this but be aware:

- You will need the title and level of the apprenticeship framework or standard you want delivered and postcode of where the apprentice is based.
- Providers are listed against these frameworks/ standards based on the information they submitted in their RoATP application so it is not always up to date or accurate.

**Tip:** You have limited information on the quality of what they offer so always check to see if there is an Ofsted report for them or whether they have been a sub-contractor for another organisation that has an Ofsted report.

[www.ofsted.gov.uk](http://www.ofsted.gov.uk)

# Set-up – training – finding providers

## Search results

There are **40** apprenticeships matching your search for 'team leading level 3'.

Results labelled **New** are apprenticeship standards developed by employer groups.

Showing search results for:

## Filter results

Sort by

### Apprenticeship level

- level 2 (8)
- level 3 (25)
- level 4 (5)
- level 5 (1)
- level 6 (1)
- level 7 (1)

► Explain levels

### [Welding - level 3](#) **New**

**Level:** 3 (equivalent to A levels at grades A to E)

**Typical length:** 38 months

### [Management: Team Leading](#)

**Level:** 2 (equivalent to GCSEs at grades A\* to C)

**Typical length:** 12 months

### [Management: Team Leading \(Construction\)](#)

# Before you can add an apprentice or group of apprentices

You need to know the UPRN number for the provider you wish to use and you should have an agreement in place with them ie a contract with strong Key Performance Indicators (KPIs).

**Tip:** We have found that you have to add this each time you want to upload an apprentice or group of apprentices

**Tip:** It is easier to upload a group of apprentices ie a 'cohort' than to do them individually

**Tip:** Once you start to add a group you need to do them in one go ie you cannot continue with the same cohort if you come out of the system.

# Before you can add an apprentice

## Add an apprentice

Add details of one or more apprentices to your account, and authorise payments to their training provider.

### Before you start

You must:

- know the names of your apprentices
- know your training provider's UK Provider Reference Number (UKPRN) - your training provider can tell you this
- make sure the organisation that's named on the contract you have with your training provider is in your account - [view organisations in this account](#)
- make sure the PAYE scheme that each apprentice is paid through is in your account - [view PAYE schemes in this account](#)

[Start now >](#)

# Example of where you can ask your provider to upload the apprentices for you

## Start adding apprentices

You can start adding details of your apprentices or ask your training provider to add them for you.

If you ask your training provider to add them, you need to check and agree the details before any payments are made.

- I will add apprentices
- I would like my provider to add apprentices

Continue

# Employer or provider to upload apprenticeship details

We ask our providers to up-load the apprenticeship details as the benefits are:

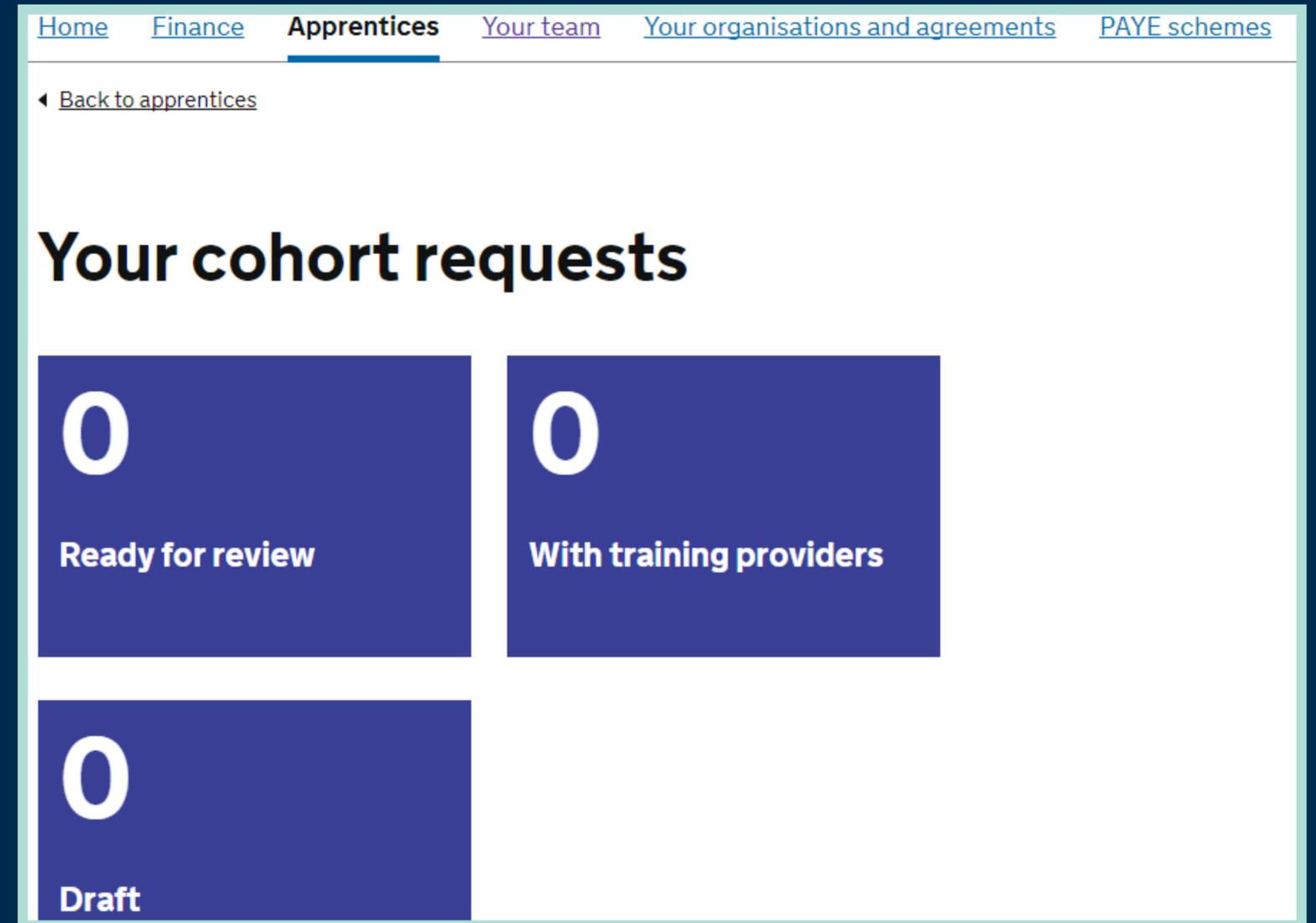
- They know the apprentices' Unique Learner Number. We do not
- They know the ILR start and end date for each apprentice. We do not
- They have uploaded to the ESFA and have the accurate information. We do not
- It simplifies the approval process as it then comes to us and we check and then approve. If we uploaded, the provider would need to amend, it would then come back to us for approval so takes longer.

**Tip:** Ensure your provider sets the length of programme for each apprentice and informs you so that you can check this is correct when you approve.

**Tip:** Allow at least 3 months for End Point Assessment until we have hard data to base decisions on.

# Managing the cohorts of apprentices

- We get an alert via the system to let us know that there is a cohort uploaded by our providers ready for our approval
- We can track the progress of each cohort as it goes through the approval process.



# Managing the apprentices

The system is very intuitive so that you can easily view and edit apprentice information. You can view the whole programme, by cohort or by provider:

### Manage your apprentices

**Status** ^

- Live
- Stopped

**Alerts** v

**Training Courses** ^

- Business and Administration, Level: 3
- Sales and Telesales, Level: 3

Name	Date of birth	Status	Alerts
Andrew	Nov 1997	Live	<a href="#">View</a>
Anthony	Jan 1995	Live	<a href="#">View</a>
Ben	Jan 1995	Live	<a href="#">View</a>
Charlotte	Feb 1995	Live	<a href="#">View</a>
Charlotte	Oct 1992	Live	<a href="#">View</a>
Chris	Nov 1993	Live	<a href="#">View</a>
Emma	Feb 1978	Live	<a href="#">View</a>
Emmalee	Dec 1997	Live	<a href="#">View</a>
James	Jan 1979	Live	<a href="#">View</a>
Jonathan	Aug 1992	Live	<a href="#">View</a>
Markus	Feb 1994	Live	<a href="#">View</a>
Neil	Jan 1994	Live	<a href="#">View</a>

### Overview

Training provider

Cohort reference VRB6PR

**Apprentice** [Edit](#)

Name

Date of birth

Apprenticeship training course Sales and Telesales, Level: 2

Training start date 1 Jul 2017

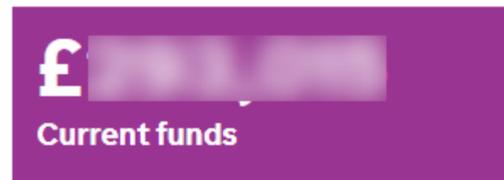
Training end date 1 Jul 2018

Total cost of training £1,500

Reference

## Your transactions

August 2017



Payment date	Description	Amount	
23 Aug 2017	Levy	£77,450.10	<a href="#">Details</a>
4 Aug 2017		-£2,706.67	<a href="#">Details</a>
4 Aug 2017		-£5,731.11	<a href="#">Details</a>



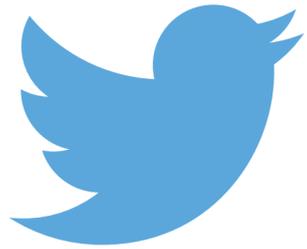
*Recap*

# Key decisions to make

- Who in the business needs to use the system and to what level?
- Who has the knowledge to upload the PAYE information and allocate it correctly?
- Which providers are you going to use?
- Are you or your provider(s) going to upload the apprentice details?

**Tip:** Make sure that you are fully conversant with the funding rules as an employer so that you can edit/remove apprentices appropriately to ensure you do not incur financial penalties.

# Keep in touch



**@pearsonappr**



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newsletter**

**[qualifications.pearson.com/en/forms/wbl-newsletters.html](http://qualifications.pearson.com/en/forms/wbl-newsletters.html)**

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and Lucy Vigrass

**ALWAYS LEARNING**