



Pearson

Pearson Smart EPA

Apprentice Management
Guide





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Add Apprentice

To add a new apprentice onto the Smart EPA platform, click on the “Apprentice Management” option on the dark blue menu on the left hand side. This will reveal the actions available to you, then click on “Add Apprentice” to open the relevant screen.



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DASHBOARD

Welcome Back, SEPA TRAINING PROVIDER

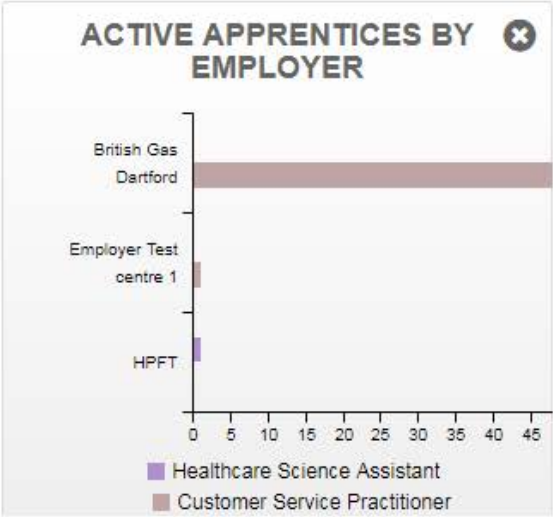
Dashboard

DASHBOARD

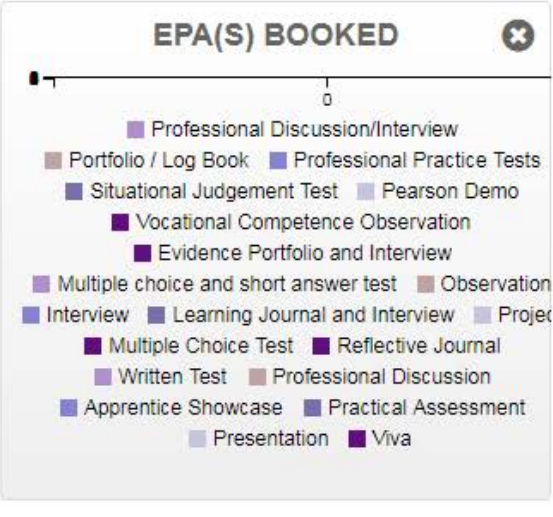
Please Select

Add Widget


ACTIVE APPRENTICES BY EMPLOYER



EPA(S) BOOKED



UPCOMING EPA(S) IN THE NEXT DAYS





Add Apprentice


You can then add the details for the apprentice. There are three tabs at the top: “Personal Details”, “EPA Details” and “Other”.

The first section is for the Apprentice’s personal details. Any field with a red marker must be completed, the marker will turn green once there is a valid entry. Please note:

- A valid Unique Learner Number must be added as this will be checked against the Learner Records Service.
- Learners must be 16 or over, their age will show once you have entered a date of birth.

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ADD APPRENTICE

Personal Details

EPA Details

Other

ULN

1234567890

Title

Mr

Given Name

Sample

Family Name

Apprentice

DOB

01/01/1985

33 year(s) old

Gender

Male

Other (Gender)

Email

sample@email.com

Phone Number

Mobile Number

Ethnic Origin

English / Welsh / Scottish / Northern Irish / British

NI Number

AA11 11 11A

Save



Save and Close


Save and New

Cancel

Add Apprentice

Towards the bottom of this form, you can add any information regarding disabilities that a learner has. Use the drop down menu to select an option and then click on “Add Disability”. You can ignore this section if this is not applicable.

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Family Name

DOB

28/09/2002

Gender

-- Please Select --

This field is required.

Other (Gender)

-- Please Select --

Asperger's Syndrome

Autistic spectrum disorders

Behavioural, emotional and social difficulties

Disability affecting mobility

Emotional/Behavioural

General learning difficulties

Hearing Impairment

Learner considers himself or herself to have a learning difficulty and/or disability but the type is not known or not declared

Mental Health Difficulty

Moderate learning difficulties

Multi-sensory impairment

No disability

Not known/Not Provided

Other

Other medical condition

Other physical disability

Physical and/medical difficulties

Profound and multiple learning difficulties

Profound complex disabilities

DISABILITIES

-- Please Select --

ADD DISABILITY +

DISABILITY

DETAILS

ACTIONS

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Smart Apprentices


Add Apprentice


Next, you need to go to the “EPA Details” tab to add the apprenticeship programme details the learner is on. Again, any fields with a red marker are mandatory.


Use the drop down to select your “Training Provider/College”, the address will then automatically populate. You can select the “Employer” and “Employer Address” from the drop down on the left hand side.

If the employer details you require are not listed then please contact epadelivery@pearson.com

You can then use the drop down to select the relevant standard that the Apprentice is on.


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Personal Details

EPA Details

Other

EMPLOYMENT / TRAINING DETAILS

Employer

Sample Employer

Employment Address

Sample Employer, 1 Sample Street, Manchester,

Training Provider/College

Sample College

Training Address

Sample Training, 2 Sample Street, Manchester

STANDARD DETAILS

Standard

Customer Service Practitioner - Level 2 (122 - v1.00)

STANDARD INFORMATION

ASSESSMENT TYPES

LARS CODE

PUBLISHED DATE

APPRENTICE SHOWCASE

PROFESSIONAL DISCUSSION/INTERVIEW

OBSERVATION

122

29 July 2016

Add Apprentice

07

Scroll down to complete the rest of the form. Please note that:

- “Apprenticeship Start Date” should be the date the learner began their on-programme learning.
- “EPA Start Date (expected)” is the date that the learner is predicted to begin their “Gateway to EPA”.
- “Apprenticeship End Date (expected)” is the date when the learner is predicted to complete their EPA.
- For funding type choose “Government Funded” if the apprentice is being funded from the levy or works with a company that is funded 90% by the government, or choose ‘Employer funded’ if the apprentice is being paid for by the employer through their training budget (not levy funded).

The screenshot shows the SEPA Training Provider interface. The top header includes the SEPA logo (Smart End Point Assessment) and the Pearson logo. On the right, it says "SEPA TRAINING PROVIDER" with a user profile icon and buttons for "My Profile" and "Logout".

The left sidebar contains a navigation menu with the following items:

- Sm SETTING MANAGEMENT
- Am APPRENTICE MANAGEMENT (highlighted)
- ASSESSMENT CENTRE MANAGEMENT
- Em EMPLOYER MANAGEMENT
- E Pa EPA
- Ch COMMUNICATION HISTORY
- Re REPORTING
- RESOURCES

The main content area is titled "EPA DETAILS" and contains the following fields:

- Apprenticeship Length: 12 Months 0 Days
- Apprenticeship Start Date: 28/09/2018
- EPA Start Date (expected): 06/01/2020
- Registration Invoice Not yet specified
- EPA Invoice Not yet specified
- Line Manager Name: Sample Manager
- Apprentice Coordinator: [Empty field]
- Has EPA Membership? ☐
- Apprenticeship End Date (expected): 01/02/2020
- Registration PO Number: [Empty field]
- EPA PO Number: [Empty field]
- Assessor / Tutor Name: Sample Tutor
- Line Manager Contact: [Empty field]
- Funding Type: Employer Funded

At the bottom, there is a section titled "REASONABLE ADJUSTMENTS" with the field "Are Reasonable Adjustments Required?" and an unchecked checkbox.

Add Apprentice


To add Reasonable Adjustments, tick the box towards the bottom of the page to open the menu. You can then use the drop down (circled below) to select the adjustment. Click the green “Evidence” button to upload any supporting documentation.

Finally click the green “Add Reasonable Adjustment” button to add the adjustment.


REASONABLE ADJUSTMENTS

Are Reasonable Adjustments Required? ☒

REASONABLE ADJUSTMENTS

EVIDENCE 

-- Please Select --

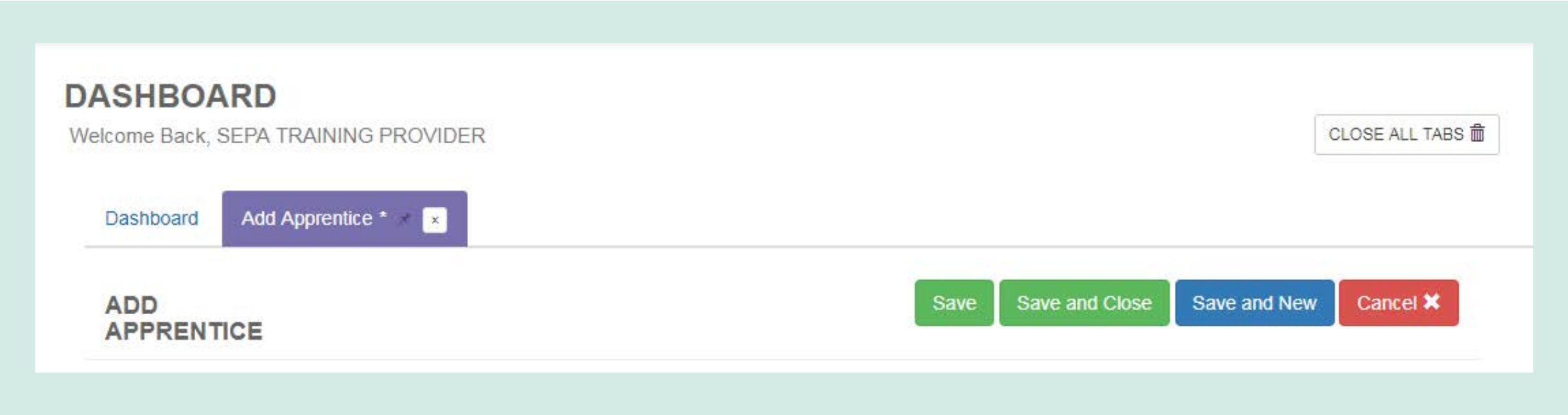
ADD REASONABLE ADJUSTMENT 

REASONABLE ADJUSTMENT NAME	EPA PROVIDER COMMENTS	STATUS	ACTIONS
----------------------------	-----------------------	--------	---------

Add Apprentice



Once you have added all the apprentice details, scroll back to the top and click on either:

- “Save” to save the changes but stay on that record.
- “Save and Close” to save changes and close the record.
- “Save and New” to save the changes and start adding a new Apprentice.



View / Edit Apprentices

To view or edit any Apprentice records you have created click on the “Apprentice Management option on the dark blue menu on the left hand side. This will reveal the actions available to you, then click on “View/Edit Apprentices” to open the relevant screen.



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DASHBOARD

Welcome Back, SEPA TRAINING PROVIDER

Dashboard

Add Apprentice

DASHBOARD

-- Please Select --

Add Widget

ACTIVE APPRENTICES BY EMPLOYER

Employer Test centre 1

HPFT

051015202530354045

Healthcare Science Assistant

Customer Service Practitioner

EPA(S) BOOKED

Professional Discussion/Interview

Portfolio / Log Book

Situational Judgement Test

Vocational Competence Observation

Evidence Portfolio and Interview

Multiple choice and short answer test

Interview

Multiple Choice Test

Written Test

Apprentice Showcase

Professional Practice Tests

Pearson Demo

Learning Journal and Interview

Reflective Journal

Practical Assessment

Observation

Project

Presentation


Viva


UPCOMING EPA(S) IN THE NEXT DAYS


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View / Edit Apprentices

You can use the fields to filter your search. Once you have entered the parameters, click the “Search” button.

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Apprentice List

FILTER

Name

Sample Apprentice

Employer

-- Please Select --

Training Provider

-- Please Select --

Standard

-- Please Select --

Apprentice Status

-- Please Select --

PO No# or Invoice References

PO No#, Registration Invoice Ref, Epa PO No#, Epa Invoice Ref, Epa Resit PO No#

Custom Field Value

Custom Field Value



Show Inactive?


☐

Search

View / Edit Apprentices

Under the filter fields, there will now be a list of all results for those search parameters. Click on the relevant line of information (e.g the learner name) to view the Apprentice record.



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Custom Field Value

Custom Field Value

Show Inactive? ☐

Search

APPRENTICES

SEARCH:

REFRESH

ULN	NAME	EMAIL ADDRESS	EPA EXP START DATE	STATUS	LAST UPDATED DATE	IS ACTIVE?
123456789	Sample Apprentice	sample@email.com	12/07/2018	Booked	12/07/2018	Yes

Showing 1 to 1 of 1 entries

Previous

1


Next


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Smart Apprentices

View / Edit Apprentices

You can now edit the Apprentice record as needed. Once complete, use the save buttons at the top to save your changes.

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Edit Apprentice * 


EDIT APPRENTICE


Apprentice Status - Booked

Save

Save and Close

Save and New

Cancel 

Deactivate Apprentice 

Personal Details

EPA Details

Documents

Checklist

Booking(s) / Resit(s)

Other

ULN

1234567890

Added On 12/07/2018

Title

Mr

Email

sample@email.com

Given Name

Sample

Phone Number

9087647893


Family Name

Apprentice

Mobile Number

DOB

12/07/2001



17 year(s) old

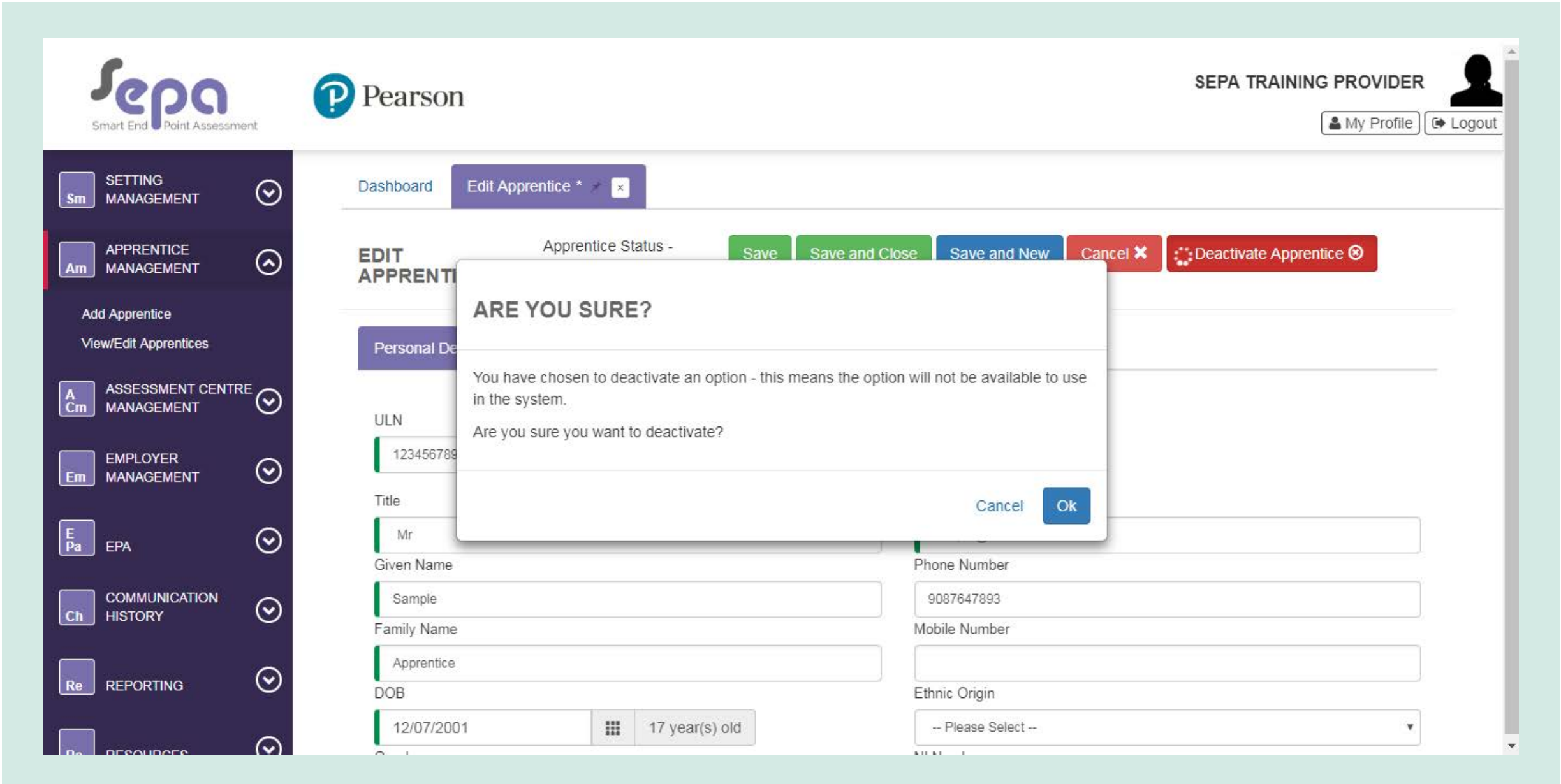
Ethnic Origin

-- Please Select --

Deactivate Apprentices

If an apprentice leaves the programme, you should deactivate them on Smart EPA. To do this, follow the same steps to View / Edit Apprentices, and once on the record click the red “Deactivate Apprentice” button towards the top of the page.

A dialog box will then open asking you to confirm the deactivation.






Gateway Checklist

Once the Apprentice has completed their on-programme learning, you will need to upload their “Gateway” evidence onto the Smart EPA platform before we will schedule an EPA.

To do this, find the relevant Apprentice record by clicking on the “Apprentice Management” option on the dark blue menu on the left hand side. This will reveal the actions available to you, then click on “View/Edit Apprentices” to open the relevant screen.

You can use the fields to filter your search. Once you have entered the parameters, hit the “Search” button. Under the filter fields, there will now be a list of all results for those search parameters. Click on the relevant line of information (e.g the learner name) to view the Apprentice record.

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Custom Field Value

Custom Field Value

Show Inactive?

Search

APPRENTICES

SEARCH:

REFRESH

ULN	NAME	EMAIL ADDRESS	EPA EXP START DATE	STATUS	LAST UPDATED DATE	IS ACTIVE?
123456789	Sample Apprentice	sample@email.com	12/07/2018	Booked	12/07/2018	Yes

Showing 1 to 1 of 1 entries

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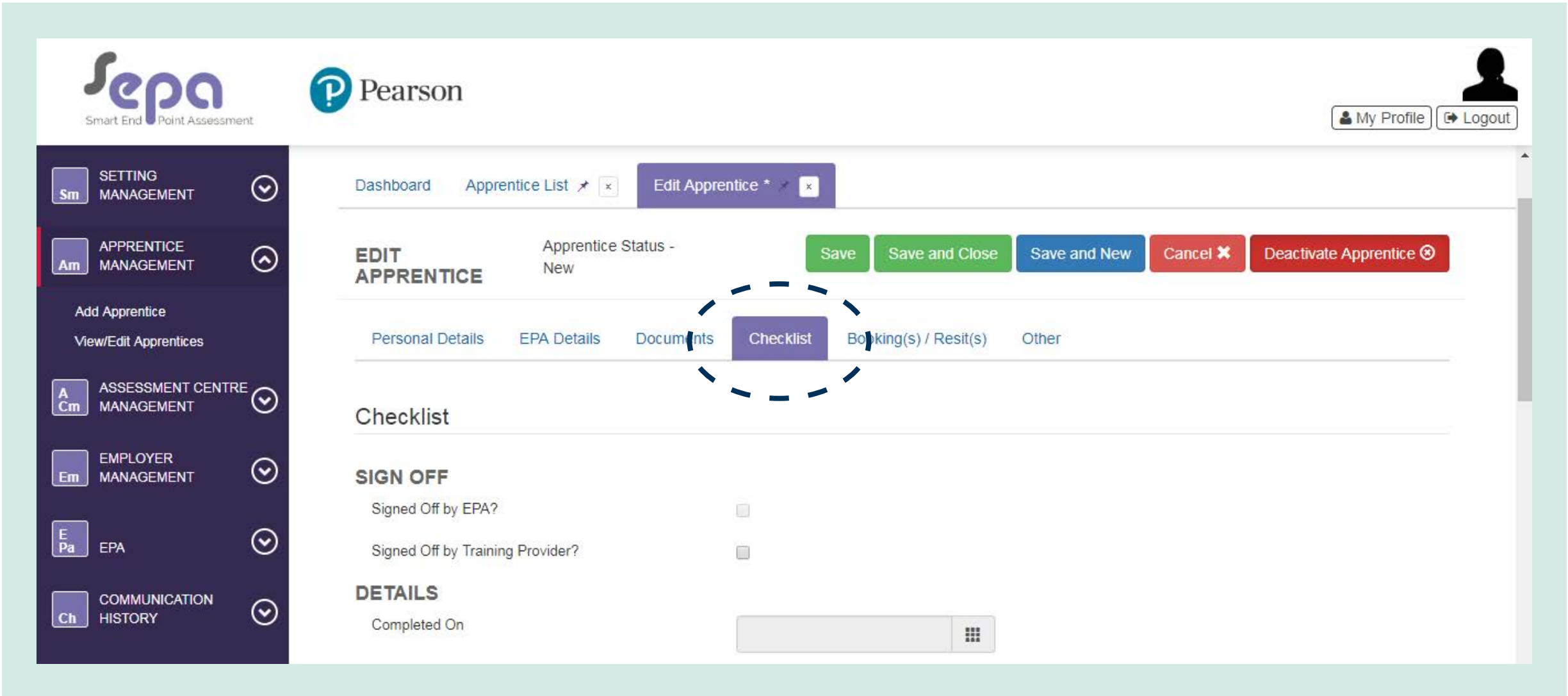
Next

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Smart Apprentices

Gateway Checklist


Once on the relevant Apprentice record, click on the “Checklist” tab at the top to open the correct page.





Gateway Checklist – Uploading Evidence

Scroll down to find the “Checklist”, a list of items you will need to tick off before you can “sign off” the Gateway. These will vary depending on the standard the learner is following.

You will notice that some of these items require you to upload supporting evidence to be signed off by our EPA Delivery team.

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CHECKLIST

CHECKLIST DOCUMENT COUNT - 0

QUESTION	ANSWER
Has the apprentice been on programme for a minimum of 12 months?	<input checked="" type="checkbox"/>
Has the apprentice achieved Level 2 English and Maths?	<input checked="" type="checkbox"/>
Has the apprentice achieved a regulated Level 5	<input type="checkbox"/>

CHECKLIST

EVIDENCE

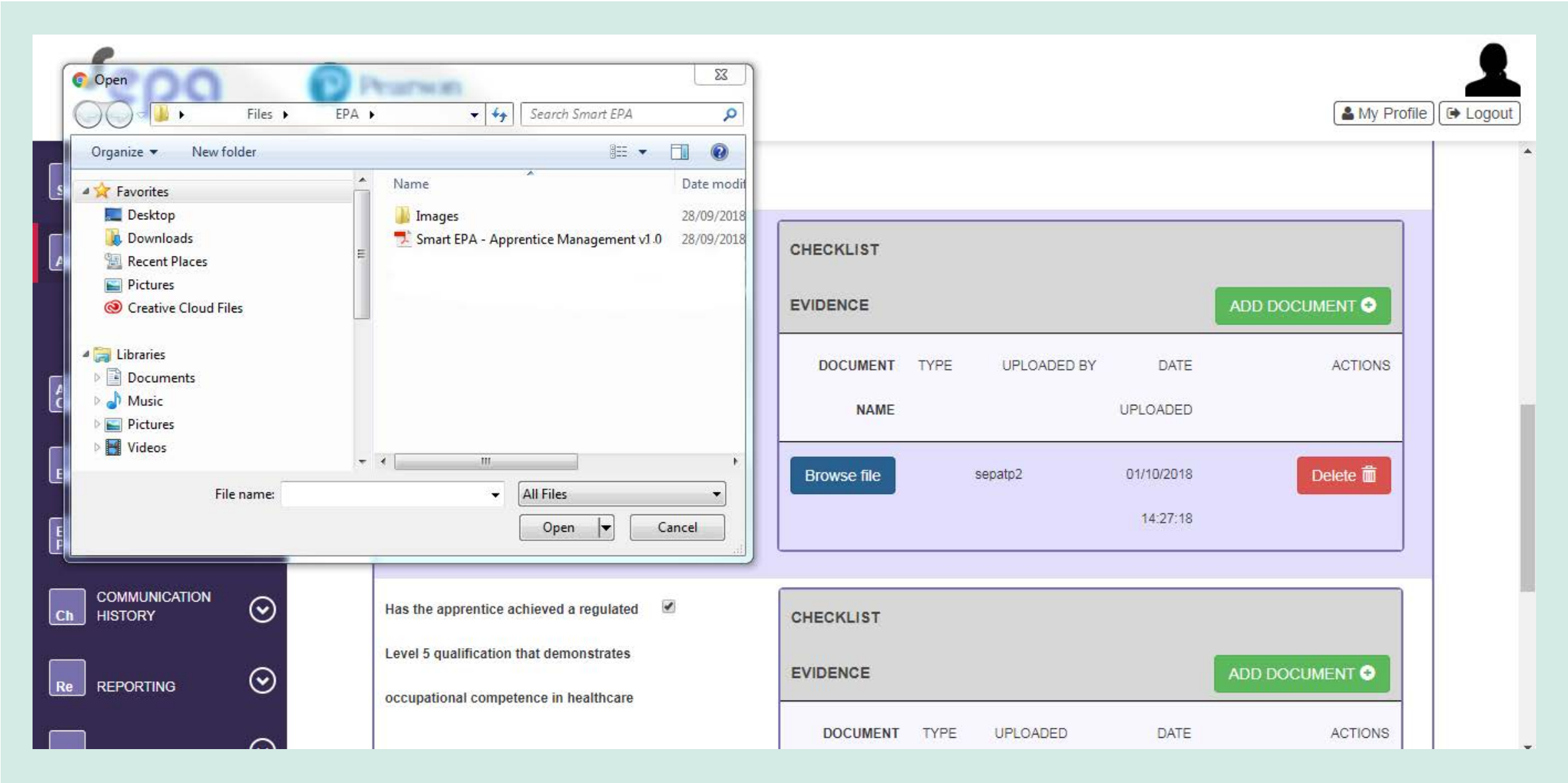
ADD DOCUMENT

DOCUMENT	TYPE	UPLOADED	DATE	ACTIONS
NAME	BY	UPLOADED		

Gateway Checklist – Uploading Evidence

To upload the documents, click on the green “Add Document” button. Then select the blue “Browse File” button to open a file browser that you can use to locate the relevant evidence. Once found, select the item, then click on “Open” in the file browser to upload the document.

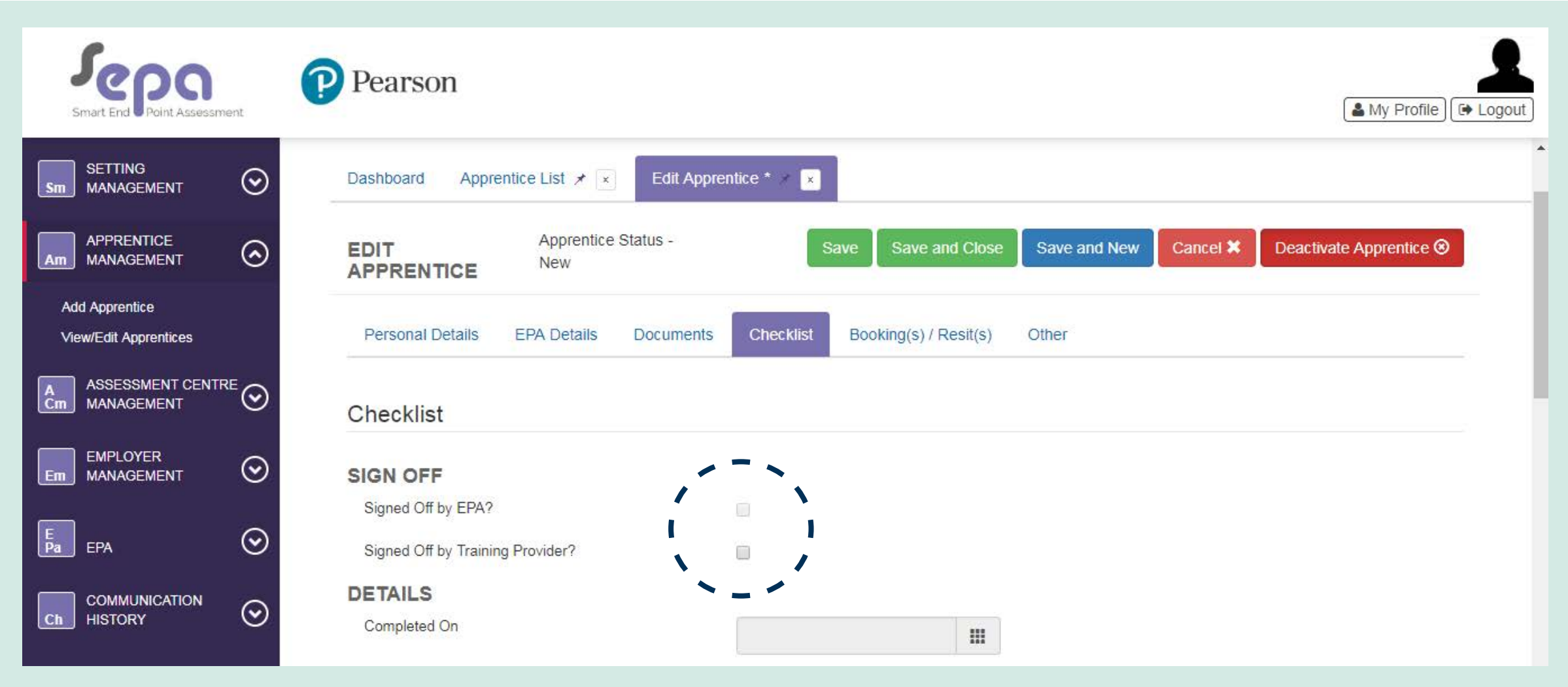
We would recommend uploading all the evidence at the same time but you can tick off items and upload file items incrementally, just make sure you save all changes by clicking the green “Save” button at the top of the screen.



Gateway Checklist

Once you have ticked off all the items and uploaded all of the evidence files, tick the “Signed Off by Training Provider” tick box towards the top of the page, and click one of the “Save” buttons to save the changes.



This will then notify our EPA Delivery Team to check the uploaded evidence is correct and satisfactory. Once this is done, the “Signed Off by EPA” box will be ticked by our team, and we will contact you regarding scheduling an EPA for the Apprentice.




View Bookings & Results

EPA bookings are currently arranged by our EPA Delivery Team. They will be in touch once an Apprentice’s gateway checklist has been completed to schedule the EPA. To view an Apprentice’s EPA bookings, follow the steps outlined in the “View/Edit Apprentices” section to find the relevant Learner.

You can then click on the “Booking(s) / Resit(s)” tab to view any EPA bookings for that Apprentice.

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Edit Apprentice

Apprentice List

Edit Apprentice

EDIT APPRENTICE

Apprentice Status - Complete

Save

Save and Close

Save and New

Cancel

Deactivate Apprentice

Personal Details

EPA Details

Documents



Booking(s) / Resit(s)


Other

BOOKING(S) / RESIT(S)							
ASSESSMENT TYPE	DATE BOOKED	STATUS	ASSESSOR / ASSESSMENT CENTRE	PO NO #	INVOICE NO #	COST	ACTIONS
Observation	31/05/2018 @ 11:00	Confirmed	Assessor	N/A	N/A	£0	
Apprentice Showcase	31/05/2018 @ 09:00	Completed	Assessor	N/A	N/A	£0	

View Bookings & Results

You can view the overall result of the EPA, as well as the component results on the “Booking(s) / Resit(s)” page. The overall result appears underneath the bookings section.



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Overall Grade

Pass

Date Cert Awarded

03/06/2018

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