

Skillsfirst Assess

ePASS User Guide for Administrators

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Disclaimer

Whilst every effort has been made to ensure that the information and content within this user guide is accurate, up-to-date and reliable, the information provided is on an “as is” basis. Skillsfirst Assess shall have neither liability nor responsibility to any person or entity with respect to any loss or damages arising from the information contained in this guide or from the use of the software accompanying it.

The layout and functionality of the screens in this guide will be consistent with the system.

About this guide

This guide will give you the information you need to import and create data, schedule tests, import data and help apprentices through their End-point Assessment journey.

We advise that you familiarise yourself with the information in the guide before using ePASS for your End-point Assessment needs.

Technical problems

Should you encounter any problems with any aspect of your installation or with using ePASS, please contact us via enquiries@skillsfirstassess.co.uk or 0121 270 5100 (option 3).

Using ePASS

Below you will find some general information on using the ePASS system.

Username and Password

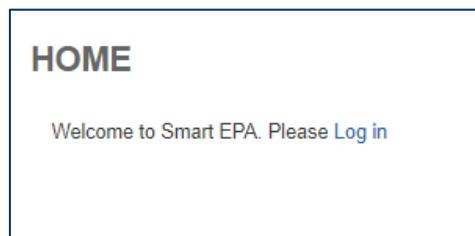
To request a username and password, a lead administrator or manager within your Provider will need to complete and return the ePASS User Request Form (see Appendix 1) to enquiries@skillsfirstassess.co.uk.

Upon receipt, a member of our team will create the requested users. Each new user will receive an automated email confirming their login details. In the event that the user does not receive this email, please notify us so that we can reset their password and send the details over via email.

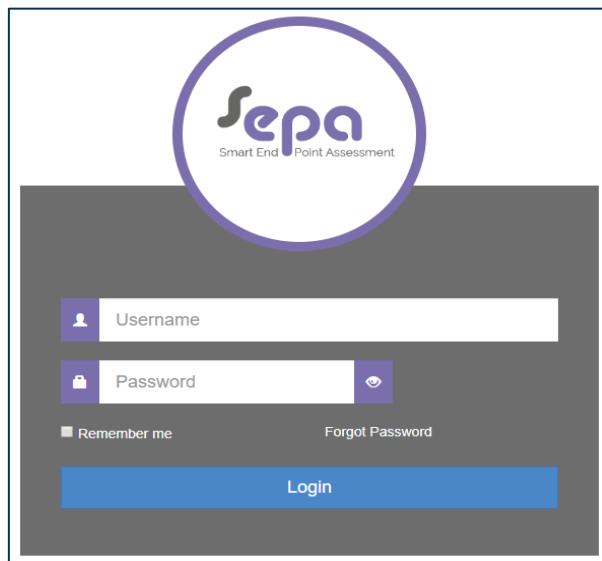
Log in

You can log into ePASS by going to <https://smartepa.co.uk/>.

The screenshot below shows you the welcome screen. Select 'Log in' to take you to the login page.



Enter your Username and Password and select 'Login'. This will take you to your dashboard.



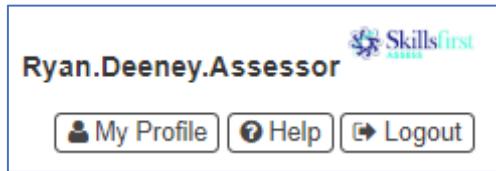
Please note: If you want to view your password before logging in, select the 'eyeball'.



MakeUpPassword54!



When you log in, your name will appear in the top right-hand corner of the screen next to your profile picture. As you can see in the screenshot below, there are three further options available: My Profile, Help and Logout.



My profile

By opening 'My Profile', you will be able to amend your personal details including your Title, Name and Contact Details, as you can see in the screenshot below.

EDIT PROFILE		Change Profile Picture	Back to Dashboard
Title	Mr		
First Name	Ryan		
Surname	Deeney		
Company Name	Skillsfirst Assess		
Job Title	Fake Assessor		
Email Address	ryandeeney@skillsfirst.co.uk		
Phone Number	0121 270 5100		
Mobile Number			
Preferred Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, London		
<input type="button" value="Save"/> <input type="button" value="Reset Password"/>			

Profile picture

You will also notice an option for 'Change Profile Picture' which will bring up the following screen.

Select 'Browse File' to search for your profile picture.

UPLOAD PROFILE PICTURE FOR RYAN.DEENEY.ASSESSOR	
Select the image file you want to display in the site header	<input type="button" value="No file selected"/> <input type="button" value="Browse file"/>
 Skillsfirst ASSESS	
<input type="button" value="Upload"/>	<input type="button" value="Cancel"/>

Help

The 'Help' section will give you access to the ePASS Knowledge Base, a series of guides on how to complete tasks in various areas of the platform.

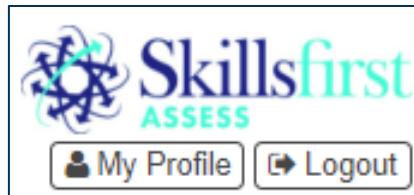
Each guide is split into headings in line with the areas available within ePASS. For example, 'Apprentice Management' or 'Employer Management'.

Left-click on the guide you would like view and a new tab will open. Within this tab, you will be able to download a PDF which provides guidance on how to navigate your selected area of the platform.

Log Out

When you have completed your activities in ePASS, you must log out. This ensures that no-one else can use the system without authorisation, should you need to leave your computer unattended.

To log out of the system, click the arrow next to your username and select 'Logout', as shown below.



Navigation

This section of the user guide will support you with navigating your way through ePASS to access certain areas of the system.

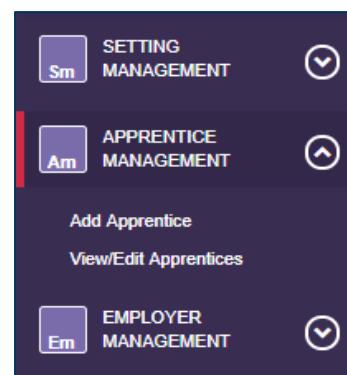
To see further information on how to navigate around ePASS, please view the video in this link: [Navigating through Smart EPA](#)

Navigation menu

To navigate to different areas of ePASS, you will use the navigation menu on the left-hand side of your screen. Within each section are areas that you can access, as shown in the image to your right.

For example, if you wanted to access "View/Edit Apprentices, you would left-click on the arrow for "Apprentice Management" then select "View/Edit Apprentices" to enter that section.

This will open up a new tab with the requested information.



Tabs:

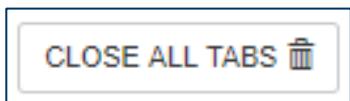
Whenever you open up a new area of the system, a new tab will appear within ePASS:



This feature ensures that all navigation through ePASS can be completed in one tab on your internet browser, not several. It also means that if you are working on something and select to open another part of ePASS, you will not lose your work.

If you are working on a page and accidentally select the 'x' button, you will be advised "if you choose to Cancel, this record will not be saved. Are you sure you wish to cancel?" If you are sure, select 'Ok'.

If you want to remove all tabs that you have worked on before logging out, or just to clear your tab space, you can do so by selecting the "Close all tabs" button on the right-hand side of the page.



Please note: When you log out of ePASS, you will lose the tabs you have been working on. Please ensure you have completed and saved all work in ePASS before logging out.

System Management

System Management is the section that will allow you to import data into ePASS. This will include importing files to create apprentices and employers within ePASS.

Import Data

To import a registration file into ePASS, you will need to go through Import Data. To import a file, follow the steps below:

1. Fill in the 'Import Template – Apprentice Details' or 'Import Template – Employer Details' spreadsheets (if you do not have a copy, please contact us and we can provide you with this) using the 'Guidance for Importing' guides (Appendix 1 & 2)
2. Select 'Browse file' and search for the file that you would like to upload into ePASS. Select the file and then 'open' to import this.
3. Select the relevant 'Import Template' from the drop-down list depending on whether you are uploading information for employers or apprentices.
 - a. For apprentices, select "Apprentice Data Information"
 - b. For employers, select "Employer Data Information"
4. Select 'Upload Data'

Your file will now be uploaded.

Upon completion of the import, you will receive a note confirming how many apprentices/employers were created in the system. If there are any errors with the import, you will be notified of these with reasons provided as to why the import was unsuccessful.

Please note: You must create the apprentice's Employer before creating the apprentice. The apprentice must be assigned to an Employer.

If you have any issues importing your apprentices, please contact us on 0121 270 5100 (option 3) or email us at enquiries@skillsfirstassess.co.uk.

Apprentice Management

Apprentice Management is the area that will allow you create a new apprentice and view or edit those that have already been registered with Skillsfirst Assess.

Add Apprentice

If there is an occasion where you need to add a single apprentice to the system, you can do so by selecting 'Add Apprentice'.

Three tabs will appear in this section:

- Personal Details
- EPA Details
- Other

Personal Details

The Personal Details section is where you will provide personal information relating to the apprentice such as their Unique Learning Number (ULN), Name, Date of Birth and contact details. The table below will support you with what information is required for each title:

Title	What is required?
ULN	The apprentice's unique learning number
Title	The apprentice's title (select Mr; Ms; Mrs; Miss; Dr or Other from the available drop down)
Given Name	The apprentice's given name
Family Name	The apprentice's family name
Date of Birth	The apprentice's date of birth (Format as DD/MM/YYYY)
Gender	The apprentice's gender (select Male; Female; Not given; Unknown or Other from the available drop down)
Email	The apprentice's email address
Phone Number	The apprentice's landline number (min 10, max 13 characters)
Mobile Number	The apprentice's mobile number (min 10, max 13 characters)
Ethnic Origin	The apprentice's ethnicity (select from the table on page 3)
NI Number	The apprentice's National Insurance number (must end in A, B, C or D)
Disabilities	If the apprentice has a disability that requires a Reasonable Adjustment, select the disability from the drop-down list. Once you have added the disability, add any necessary details, including information on the document uploaded as evidence. **

** Disabilities: If an apprentice does have a disability, you must provide evidence to support this. You can do this by adding a document as evidence in the 'Documents' section. To learn more, scroll down to the 'Documents' section in 'Apprentice Management' in this guide.

EPA Details

The EPA Details section is where you will provide information about the apprentice's End-point Assessment including the standard they are completing, their start date, end date and funding type.

Title	What is required?
Employer	The Employer the apprentice is linked to
Employer Address	The address of the Employer (select from drop down)
Training Provider/College	The Training Provider the apprentice is linked to
Training Address	The address of the Training Provider (select from drop-down)
Standard	The full name of the standard the apprentice has been registered on (select from drop-down)
Pathways/Option	If required, select the relevant pathway/option from the drop-down list
Length of Programme (months)	The expected number of months the apprentice will take to complete their apprenticeship (e.g. "14" for 14 months, "24" for 24 months)
Length of Programme (days)	The expected number of days the apprentice will take to complete their apprenticeship (in addition to months e.g. "15" for 14 months and 15 days; "0" for 12 months and 0 days)
Start Date	The apprentice's apprenticeship start date (Format as DD/MM/YYYY)
End Date (expected)	The apprentice's expected apprenticeship end date (DD/MM/YYYY)
Employer ID	The EDRS number for the apprentice's employer
EPA Start Date	The apprentice's expected EPA start date (DD/MM/YYYY)
Tutor	The full name of the apprentice's tutor
Line Manager Name	The full name of the apprentice's line manager
Line Manager Contact	The best contact for the apprentice's line manager (telephone number, email address or other contacts)
Funding Type	Is the funding for this apprentice Employer Funded or Government Funded? (select from drop down)

We acknowledge that Registration PO Number, Registration Invoice, EPA PO Number and EPA Invoice are missing from the above table. No data is required for these sections: Skillsfirst do not charge for registrations and PO numbers for EPA's are to be entered on the EPA Booking Form.

Other

There are three sections within the 'Other' tab:

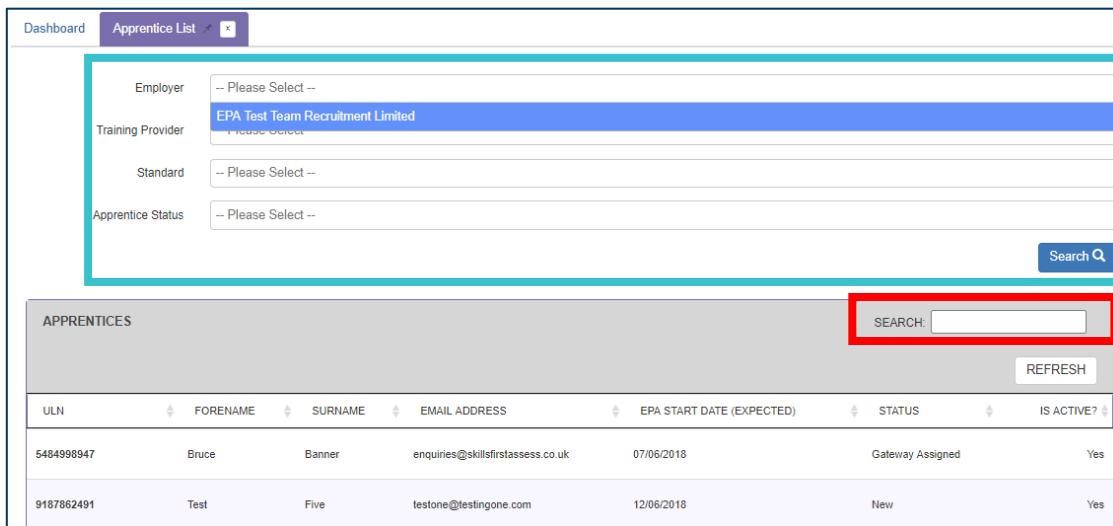
Title	What is required?
Subject Reference	Enter the subject reference to assign your apprentice to their apprenticeship in Surpass for written tests (see appendix 2).
Centre Reference	Enter your centre reference code to assign your apprentice to your centre in Surpass for written tests (see appendix 2).
Apprenticeship Certificate	Upon completion, Skillsfirst Assess will claim the apprentice's certificate. Once claimed, the certificate number will be entered by a Skillsfirst team member along with their initial and the date of the claim.

View/Edit Apprentice

View/Edit Apprentice does as you would expect – it allows the user to view and edit apprentice records.

Apprentice List

Selecting ‘View/Edit Apprentice’ will bring up the ‘Apprentice List’ which is where you can search for the apprentice you would like to edit. The screenshot below will show you what this screen looks like:



ULN	FORENAME	SURNAME	EMAIL ADDRESS	EPA START DATE (EXPECTED)	STATUS	IS ACTIVE?
5484998947	Bruce	Banner	enquiries@skillsfirstassess.co.uk	07/06/2018	Gateway Assigned	Yes
9187862491	Test	Five	testone@testingone.com	12/06/2018	New	Yes

You can search for an apprentice via Employer, Training Provider, Standard or Apprentice Status by using the available drop-down lists (see inside blue box in above screenshot). Once you have your search items, select ‘Search’.

Alternatively, you can search an apprentice by ULN, name or email address by entering the relevant information into the ‘Search’ text box (see inside the red box in the above screenshot). The apprentice list will automatically change as you enter the apprentice details.

Edit Apprentice

When you select the apprentice, you would like to view, a new tab will appear called ‘Edit Apprentice’.

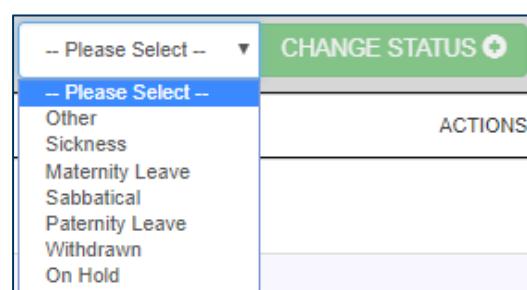
Once an apprentice has been registered on ePASS, four further tabs will appear: Documents, Checklist, Bookings/Resits and Tracked Changes. All added information to the apprentice record is explained below:

EPA Details

Once the apprentice has been created in ePASS, the ‘Status History’ of the apprentice will become available at the bottom of the ‘EPA Details’ section.

Located at the bottom of the page, this section will provide you with any changes to the apprentice’s status whether the change is automatic or manual.

To change the status history of an apprentice manually, use the available drop-down to select the apprentice’s status and select ‘Change Status’. If you select ‘Other’, you will be able to enter a reason as to why their status has changed.



CHANGE STATUS	ACTIONS
– Please Select –	
– Please Select –	
Other	
Sickness	
Maternity Leave	
Sabbatical	
Paternity Leave	
Withdrawn	
On Hold	

Documents

The documents section is where you can add any documents related to the apprentice's apprenticeship.

To add a document, select 'Add Document' to bring up the following screen:

ADD APPRENTICE DOCUMENTS

Is Evidence?	<input checked="" type="checkbox"/>
Assessment Type	Written Test
Comment	<input type="text"/>
<input type="button" value="Select files"/> Drop files here	
<input type="button" value="Save"/> <input type="button" value="Close"/>	

Select the file that you would like to upload, select 'Open' and then 'Save' this page to upload the document to the apprentice record.

Some assessments will require you to upload evidence to support the apprentice's EPA, such as an Apprentice Showcase or CPD Log. To upload evidence, follow the steps below:

1. Check the 'Is Evidence?' tick-box
2. Select the relevant assessment type from the drop-down list (this will only bring up assessment types for the apprenticeship the apprentice is completing)
3. Add a comment relating to the evidence you are uploading
4. Select the file you are uploading, select 'Open' to add the document
5. Select 'Save' to complete the upload

Once the document has been uploaded, it will appear as part of a list on the 'Documents' page, including confirmation of whether the document is evidence, who uploaded the document and the date and time that the upload was completed.

DOCUMENTS							ADD DOCUMENT 
DOCUMENT NAME	IS EVIDENCE?	EVIDENCE CONTAINS UNIQUE ID?	EVIDENCE UNIQUE ID	TYPE	UPLOADED BY	DATE UPLOADED	ACTIONS
CPD log.doc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13581	doc	Ryan Deeney Assessor	04/07/2018 15:44:39	<input data-bbox="1357 1695 1441 1724" type="button" value="Delete"/>

If you have uploaded evidence, you can add a unique ID to separate information. To do so, check the 'Evidence Contains Unique ID?' tick-box then include the unique ID under 'Evidence Unique ID'. This is not mandatory.

You can download the document by selecting the green 'Download' button. The document will automatically begin downloading the document on your internet browser.

Checklist

Once the apprentice has achieved gateway, the Training Provider will need to sign off the apprentice's Checklist.

Each checklist will be different depending on the apprenticeship that the apprentice has completed.

To sign off one part of the checklist, follow the steps below:

1. Check the tick-box in the 'Answer' column to confirm the apprentice has completed that section
 2. A box entitled 'Checklist Evidence' will appear on the right-hand side – select 'Add Document' to add any evidence confirming the apprentice's completion of this part of the checklist
 3. Select 'Browse File', search for the document and select 'Open'

Checklist

ITEMS

CHECKLIST		CHECKLIST DOCUMENT COUNT - 6																																						
QUESTION	ANSWER																																							
Has the apprentice completed the 15 standards as set out in the Care Certificate?	<input checked="" type="checkbox"/>	<div style="background-color: #e0f2e0; padding: 10px;"> <p>CHECKLIST EVIDENCE</p> <p>ADD DOCUMENT </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">DOCUMENT</th> <th style="text-align: left;">TYPE</th> <th style="text-align: left;">UPLOADED</th> <th style="text-align: left;">DATE</th> <th style="text-align: right;">ACTIONS</th> </tr> <tr> <th style="text-align: left;">NAME</th> <th style="text-align: left;">BY</th> <th style="text-align: left;">uploaded</th> <th></th> <th style="text-align: right;">Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Browse file</td> <td>docx</td> <td>ryan.deeney</td> <td>14/01/2019</td> <td style="text-align: right;">Delete </td> </tr> <tr> <td colspan="5" style="text-align: center;">Apprentice</td> </tr> <tr> <td colspan="5" style="text-align: center;">13:54:43</td> </tr> <tr> <td colspan="5" style="text-align: center;">doc.docx</td> </tr> <tr> <td colspan="5" style="text-align: center;">Download </td> </tr> </tbody> </table> </div>				DOCUMENT	TYPE	UPLOADED	DATE	ACTIONS	NAME	BY	uploaded		Actions	Browse file	docx	ryan.deeney	14/01/2019	Delete 	Apprentice					13:54:43					doc.docx					Download 				
DOCUMENT	TYPE	UPLOADED	DATE	ACTIONS																																				
NAME	BY	uploaded		Actions																																				
Browse file	docx	ryan.deeney	14/01/2019	Delete 																																				
Apprentice																																								
13:54:43																																								
doc.docx																																								
Download 																																								

Once each part of the checklist has been completed, sign off the checklist using the 'Signed Off by Training Provider' option at the bottom of the page, as shown below:

Have you trained your invigilator in line with Skillsfirst invigilation policy?	<input checked="" type="checkbox"/>	
SIGN OFF		
Signed Off by Training Provider?	<input checked="" type="checkbox"/>	ryan.deeney signed off on behalf of the Training Provider at 13:01 on 11/09/2018
Signed Off by Skillsfirst?	<input type="checkbox"/>	
DETAILS		
Completed On	<input type="text"/>	

Save the apprentice record once the Checklist has been completely signed off. The apprentice will now be available to be booked for an End-point Assessment.

Bookings/Resits

Booking/Resits is the section that will confirm whether the apprentice has been booked in for any End-point Assessments.

If the apprentice has been booked in for an End-point Assessment, this section will confirm the following details under Assessor Booking(s):

Assessment Type	The assessment type booked for the apprentice
Date Booked	The time and date of the assessment
Status	Confirmation of whether the assessment is 'Pending', has been 'Rejected', 'Conflicted', 'Confirmed' or 'Completed'.
Assessor	The name of the assessor booked against the assessment

Once the apprentice has completed their apprenticeship, the overall grade and date of completion will appear at the bottom of this tab.

Tracked Changes

If a user makes a change to an apprentice record, they will be asked to confirm their reasons for making the change when they save the record. That reason will be stored in the 'Tracked Changes' section of the apprentice record.

Personal Details	EPA Details	Documents	Checklist	Bookings/Resits	Tracked Changes	Other
TRACKED CHANGES						
CHANGE REASON		CHANGE AUTHOR		DATE/TIME OF CHANGE		
Date of Birth incorrect		Ryan.Deeney.sandbox		05/07/2018 at 10:06		

As you can see in the above screenshot, 'Tracked Changes' will confirm:

Change Reason	The user's explanation for making a change to the apprentice record
Change Author	The username of the user that made the change to the apprentice record
Date/Time of Change	The date and time that a change was made to the apprentice record

Please note: It is imperative that your user login in ePASS is only accessed by you. If somebody makes a change in ePASS under your login, it will be made against your username.

Employer Management

Employer Management is the area that will allow you create a new employer and view or edit those that have already been registered with Skillsfirst Assess.

Add Employer

If there is an occasion where you need to add a single employer to the system, you can do so by selecting 'Add Employer'.

Three tabs will appear in this section:

- Details
- User/Contacts
- Additional Details

Details

The Details section is where you will provide general information about the employer including the employer name, employer ID and address(es).

Title	What is required?
Name	The employer's name
Employer ID	A unique ID assigned to the Employer (often the EDRS number)
ESFA Funded	Is the employer ESFA funded? (select from drop down)
Primary Address	Is the selected address the apprentice's primary address? (select from drop down)
Type of Address	Type of address: Home/Business/Branch/Office (select from drop down)
Address Line 1	The first line of the employer's address
Address Line 2	The second line of the employer's address (if applicable)
Town	The employer's home town
County	The employer's home county
Postcode	The employer's postcode

Users/Contacts

The Users/Contacts section is where you will provide the Employer's contact details.

Title	What is required?
Contact Forename	The first name of the given contact
Contact Surname	The family name of the given contact
Job Title	The job title of the given contact
Preferred Contact	The contact's preferred form of contact: Email/Landline/Mobile/Other (select from drop down)
Email Address	The email address of the given contact (if applicable)
Landline Number	The landline number of the given contact (if applicable)
Mobile Number	The mobile number of the given contact (if applicable)
Other contact	Any other contact details for the employer contact (if applicable)

Please note: Any contact listed in this section will receive automatic emails from ePASS that are linked to the Employer.

Additional Details

Additional Details is made up of three sections:

- Sectors
- Linked Training Provider(s)
- Documents

Sectors

To link the Employer to a sector, use the available drop-down list (see inside blue box in below screenshot). Select the sector that contains the apprenticeship standard the Employer are delivering and select ‘Add Standard Sector’.

SECTORS		-- Please Select --	ADD STANDARD SECTOR 
STANDARD SECTOR	NUMBER OF APPRENTICES	ACTIONS	
Customer service	4		
Adult care	2		

Linked Training Provider(s)

Your Training Provider will automatically be added to The Linked Training Provider list once imported.

LINKED TRAINING PROVIDER(S)		-- Please Select --	ADD TRAINING PROVIDER 
TRAINING PROVIDER	ACTIONS		
EPA Live Test Training			

Documents

To add documents against the Employer, select “Add Document” and use the “Select files” button to search for your file. Alternatively, you can drag and drop your file into the “Add Documents” box that appears.

DOCUMENTS				ADD DOCUMENT 
DOCUMENT NAME	UPLOADED BY	DATE UPLOADED	ACTIONS	
Browse file recruitment-consultant-assessment-plan (1).pdf	Download 	Yvonne.bennett.sandbox	06/07/2018 16:00:43	 

You can download documents by selecting the “Download” button that appears next to the document you have imported.

Once you have created the Employer, select “Save” or “Save and Close” and wait for the page to refresh.

View/Edit Employer

View/Edit Employer is where you can view and edit any Employers linked to your Training Provider.

Employer List

When you select “View/Edit Employer”, a tab will open with a list of all of your Employers. To edit an Employer, left click on the row containing their details.

FILTER

Show Inactive?
Search

EMPLOYERS		
COMPANY NAME	EMPLOYER ID	IS ACTIVE?
EPA Test Team Recruitment Limited	E1000	Yes

Showing 1 to 1 of 1 entries

You can search for an Employer by entering the Employer Name or ID or name into the ‘Search’ text box (see inside red box in above screenshot).

To see any Inactive Employers, check the “Show Inactive” tick-box (inside light blue box in above screenshot) at the top and select the blue “Search” button.

To open an Employer’s record, left-click on the row containing the Employer information.

Edit Employer

When you select the Employer, you would like to view, a new tab will appear called ‘Edit Employer’.

Once an Employer has been registered on ePASS, one further tab will appear – Tracked Changes. All added information to the apprentice record is explained below:

Details

The only difference you will see in the “Details” tab is that the Number of Apprentice(s) for the Employer will now appear, see screenshot below:

Details	Users/Contacts	Additional Details	Tracked Changes
Name	EPA Test Team Recruitment Limited		
Employer ID	E1000		
	Number of Apprentice(s)	20	
	ESFA Funded?	True	

Tracked Changes

If a user makes a change to an Employer record, they will be asked to confirm their reasons for making the change when they save the record. That reason will be stored in the 'Tracked Changes' section of the Employer record.

TRACKED CHANGES		
CHANGE REASON	CHANGE AUTHOR	DATE/TIME OF CHANGE
Phone number added to contact. RD	Ryan.Deeney.Assessor	19/12/2018 at 15:28

As you can see in the above screenshot, 'Tracked Changes' will confirm:

- Change Reason** The user's explanation for making a change to the Employer record
Change Author The username of the user that made the change to the Employer record
Date/Time of Change The date and time that a change was made to the Employer record

Please note: It is imperative that your user login in ePASS is only accessed by you. If somebody makes a change in ePASS under your login, it will be made against your username.

View/Edit Training Provider/College

The View/Edit Training Provider/College tab will take you straight to your Training Provider/College record. This information will be created by Skillsfirst prior to creating your user account.

The page will include each of the following tabs:

- Details
- Users/Contacts
- Additional Details
- Linked Training Providers
- Tracked Changes
- Other

If you would like a video guide on how to operate through the 'Training Provider Management' area of the system, please open the following link: [Add/View Training Providers](#)

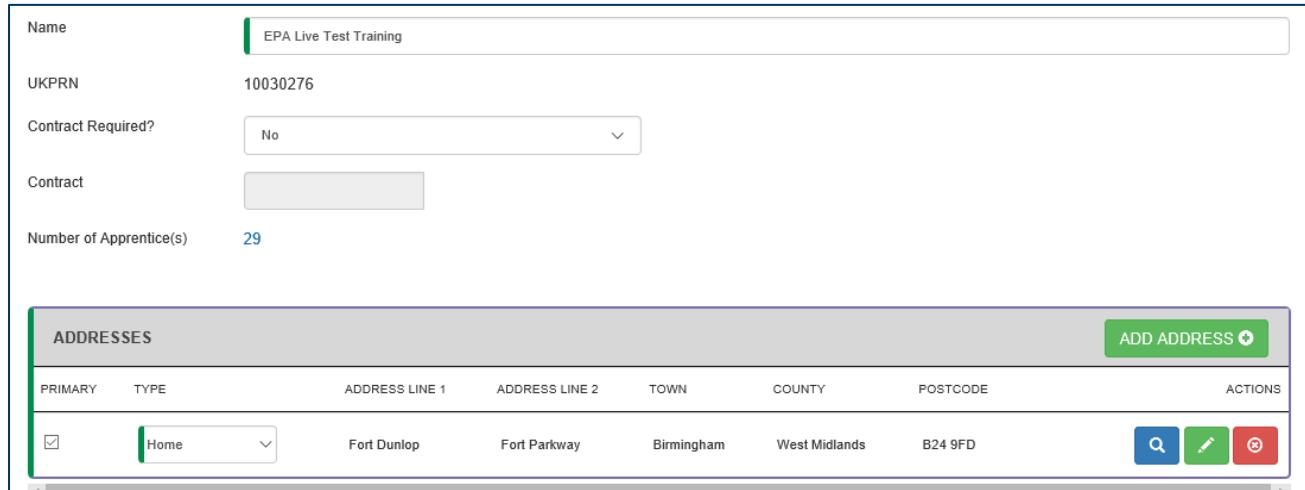
Details

The details section includes the general information relating to the Training Provider, including the following:

Title	What is required?
Name	The name of the Training Provider/College
UKPRN (non-editable)	The Training Provider/College's UKPRN
Number of Apprentice(s)	The number of Apprentice(s) linked to the Training Provider/College
Primary Address	Is the selected address the Training Provider/College primary address?
Type of Address	Type of address: Home/Business/Branch/Office (select from drop down)
Address Line 1	The first line of the Training Provider/College's address
Address Line 2	The second line of the Training Provider/College's address (if applicable)

Town	The Training Provider/College's home town
County	The Training Provider/College's home county
Postcode	The Training Provider/College's postcode

If the Training Provider/College has more than one address, you can select “Add Address” and a new line will appear.



ADDRESSES							
PRIMARY	TYPE	ADDRESS LINE 1	ADDRESS LINE 2	TOWN	COUNTY	POSTCODE	ACTIONS
<input checked="" type="checkbox"/>	Home	Fort Dunlop	Fort Parkway	Birmingham	West Midlands	B24 9FD	

Users/Contacts

The Users/Contacts section is where you will provide the Employer's contact details.

Title	What is required?
Contact Given Name	The given name of the given contact
Contact Family Name	The family name of the given contact
Job Title	The job title of the given contact
Preferred Contact	The contact's preferred form of contact: Email/Phone/Mobile/Other (select from drop down)
Email	The email address of the given contact (if applicable)
Phone Number	The landline number of the given contact (if applicable)
Mobile Number	The mobile number of the given contact (if applicable)
Other contact	Any other contact details for the employer contact (if applicable)

Please note: Any contact listed in this section will receive automatic emails from ePASS that are linked to the Employer.

Additional Details

Additional Details is made up of two sections:

- Sectors
- Documents

Sectors: To link the Training Provider to a sector, use the available drop-down list (see inside blue box in below screenshot). Select the sector that contains the apprenticeship standard the Employer are delivering and select ‘Add Standard Sector’.

Documents: To add documents against the Training Provider, select “Add Document” and use the “Select files” button to search for your file. Alternatively, you can drag and drop your file into the “Add Documents” box that appears.

You can download documents by selecting the “Download” button that appears next to the document you have imported.

Linked Training Providers

In the event that you have links to another Training Provider, a link can be requested through ePASS via this tab.

However, as a Training Provider user cannot have access to see other Training Providers, this will need to be requested through Skillsfirst via email.

Tracked Changes

If a user makes a change to a Training Provider/College record, they will be asked to confirm their reasons for making the change when they save the record. That reason will be stored in the ‘Tracked Changes’ section of the Training Provider/College record.

TRACKED CHANGES		
CHANGE REASON	CHANGE AUTHOR	DATE/TIME OF CHANGE
Phone number added to contact. RD	Ryan.Deeney.Assessor	19/12/2018 at 15:28

As you can see in the above screenshot, ‘Tracked Changes’ will confirm:

Change Reason The user’s explanation for making a change to the Training Provider record

Change Author The username of the user that made the change to the Training Provider record

Date/Time of Change The date and time that a change was made to the Training Provider record

Please note: It is imperative that your user login in ePASS is only accessed by you. If somebody makes a change in ePASS under your login, it will be made against your username.

Other

There is only one section within the ‘Other’ tab: Your Skillsfirst Assess Customer Reference number which will be input by Skillsfirst Assess:

Skillsfirst Customer Reference (Invoice Ref)
E0099

EPA

In the EPA section of ePASS, you can view all Completed Assessment(s), including apprentice feedback and grades.

View Completed Assessments

The View Completed Assessments section will feature all apprentices that have completed End-point Assessments through ePASS.

This section will include all assessments that the apprentice has or has not attended.

If you want to search for a particular assessment, or set of assessments, you can do so using the available search options:

EPA Date Select the first and last date from the calendar provided

EPA Status Select the status of the assessment from the available options

Alternatively, you can search an apprentice by ULN, name or status by entering the relevant information into the 'Search' text box (see inside the red box in the above screenshot). The apprentice list will automatically change as you enter the apprentice details.

Close
EPA - COMPLETED ASSESSMENT(S)

EPA Date	Between <input style="width: 100px;" type="text"/> and <input style="width: 100px;" type="text"/>
EPA Status	— Please Select —
Assessment Centre(s)	— Please Select —
Training Provider(s)	EPA Live Test Training x

Assessor Assessment(s)
Assessment Centre Assessment(s)

COMPLETED ASSESSOR ASSESSMENT(S)

SEARCH:

REFRESH

APPRENTICE	ULN	ORIGINAL ASSESSOR	CURRENT ASSESSOR	ASSESSMENT TYPE	EPA DATE	STATUS	STANDARDISATION REQUIRED?
Matt O'connor	7451680613	Assessor	Assessor	Written Test	21/06/2018 @ 10:00	Marked for Standardisation	
Thor Odinson	7965135425	Assessor	Assessor	Knowledge Questions (MCQ)	N/A	Results Submitted	

Please note: Skillsfirst Assess does not use Assessment Centres, therefore information will not be available via these options.

To open the apprentice's assessment record, select the green box containing an eye on the right-hand side of the row containing the relevant apprentice's information. This will bring up a new tab confirming details about the assessment that you have completed and the EPA Review.

Attendance: The attendance section will provide confirmation of whether the apprentice attended or did not attend their End-point Assessment.

Assessment Details: The Assessment details section will include the comments and evidence uploaded by the assessor.

EPA Review: The EPA Review will include the final mark and grade for the apprentice, along with any additional comments the Lead Independent End-point Assessor (LIEA) may wish to include as part of their final review of the assessment.

Once each of the assessments have been completed, an overall grade will be applied to the apprentice record by the LIEA. Skillsfirst will then complete the certification process with the ESFA via the Government Information Management Services (IDAMS).

Resources

Resources is the section that you can view any resources that you have either uploaded to ePASS or have been uploaded to support you with the End-point Assessment process.

You can filter your documents by using the available search options. Options include Document Name, Standard and Category. Select “Apply Filter” and the Resources will show.

Resource Type	<input checked="" type="radio"/> File <input type="radio"/> Url	Category	-- Please Select --
Assessment Centre	<input type="button" value="-- Please Select --"/>		
Employer	<input type="button" value="-- Please Select --"/>		
Document Name	<input type="text"/>		
Document Created	From <input type="button" value=""/>	To <input type="button" value=""/>	Standard <input type="button" value="-- Please Select --"/>
<input type="button" value="Apply Filter"/>			
RESOURCES <input style="width: 100px; margin-left: 10px;" type="text"/> SEARCH: <input type="button" value=""/>			

The resources will appear at the bottom of the screen when you select ‘Apply Filter’. To view your resource, left-click on the relevant row.

RESOURCES				
RESOURCE TYPE	NAME	CATEGORY	UPLOADED WHEN	LAST EDITED
File	ePASS User Guide for Administrators v1.pdf	Training Provider Docs	18/01/2019 @ 15:59	18/01/2019 @ 15:59
File	Complaints Policy v3 291018.pdf	Training Provider Docs	29/10/2018 @ 10:28	29/10/2018 @ 10:28
File	Reasonable Adjustments and Special Consideration policy v3 171018.pdf	Training Provider Docs	29/10/2018 @ 10:29	29/10/2018 @ 10:29

You can either “Download”, “Email” or “Preview” the file. See below details:

Download: the document will begin downloading into your internet browser for you to open and/or save

Email: email the document to yourself or a colleague

Preview: view the document within ePASS. A new tab will open with the document included

FILENAME	TYPE	CREATED	DOCUMENT DATE			
ePASS User Guide for Administrators v1.pdf	.pdf	18/01/2019 15:59:16 by ryan.deeney	18/01/2019 15:59:10	<input type="button" value=""/>	<input type="button" value="Download"/>	<input type="button" value="Email"/>

Help and support

Should you encounter any problems with any aspect of using ePASS, please contact us via enquiries@skillsfirstassess.co.uk or 0121 270 5100 (option 3).

Published by:

Skillsfirst Assess

Suite 416

Fort Dunlop

Fort Parkway

Birmingham

B24 9FD

Tel - 0121 270 5100 (option 3)

Website – <http://www.skillsfirst.co.uk/end-point-assessment>

Appendix 1: ePASS User Request Form

ePASS is our registration and online booking system for your End-point Assessment Service.

Use this form to indicate who within your Provider/Employer organisation will require access to ePASS and what level of access they require.

Please complete and submit this form to enquiries@skillsfirstassess.co.uk. Skillsfirst Assess will email individual users with their usernames and passwords.

Please complete all sections of the application form, failure to do so may incur a delay in processing your request and it may be necessary for Skillsfirst Assess to request additional information.

Section 1

Please confirm centre details:

Provider/Employer Name	Provider/Employer number

Section 2

Key	
Title	Select from: Mr, Mrs, Miss, Ms, Dr, Other
Name	Forename and surname of the user
Job Title	The job title of the user
Email address	The user's email address
Contact number	The user's preferred contact number
Access	Use the Legend to decide whether the user should have <i>Provider Admin</i> , <i>Employer Admin</i> , <i>Assessor</i> or <i>Read Only</i> access

Please confirm user details:

Legend

The legend below shows the four available roles and what level of access they are granted

Access	Provider Admin	External Assessor/Trainer	Read Only	Tutor
Import Data	✓			
Add/Edit Apprentices	✓			
View Apprentices	✓	✓	✓	✓
Add Evidence to Apprentice Record for Assessment	✓	✓		✓
Update Apprentice Checklist	✓			
Edit Training Provider	✓			
View Training Provider	✓	✓	✓	
Add/Edit Employer	✓			
View Employer	✓		✓	
View Completed Assessments	✓	✓	✓	
View Resources	✓	✓	✓	

Signed:

Date:

Appendix 2: Guidance for Importing Employer Data

The Guidance for Importing Employer Data is your complete guide for successfully registering Employers with Skillsfirst Assess.

This document has been designed to help you complete the Import Template – Employer Details spreadsheet that is required to populate ePASS with the necessary Employer information.

Incorrect or missing information could lead to an audit risk and potential delay in End-point Assessment for the Apprentice.

Employer details

Please ensure you fill in every box leaving no gaps.

Any title with ** following is mandatory information that must be included in the spreadsheet for a successful upload.

Title	What is required?
Employer Name**	The employer's name
Employer ID**	The employer's EDRS number
ESFA Funded	Is the employer ESFA funded? (select True or False from the drop down)
Primary Address**	Is the selected address the apprentice's primary address? (select True or False from the drop down)
Address Type**	The type of address (select Home; Business; Branch or Office from the drop down)
Address Line 1**	The first line of the employer's address
Address Line 2	The second line of the employer's address (if applicable)
Town**	The employer's home town
County**	The employer's home county (select from "Counties" table on Page 2)
Postcode**	The employer's postcode
Title**	Provide the title of the Employer contact (select Mr; Miss; Mrs; Ms.; Dr; Not Given; Unknown or Other from the drop-down)
Title Other	If the title of the Employer contact is given as "Other", please specify the Employer's title
Given Name**	The Employer contact's given name
Family Name**	The Employer contact's family name
Job Title**	The Employer Contact's job title
Preferred Contact**	The employer contact's preferred form of contact: (select Email; Phone Number, Mobile Number or Other from the drop down)
Email Address	The email address of the given contact (if applicable)
Phone Number	The landline/office number of the given contact (if applicable)
Mobile Number	The mobile number of the given contact (if applicable)
Other Contact	Any other contact details for the employer contact (if applicable)

If you are a Lead Provider with sub-contractors, you will need to input their information in the Linked Provider section after adding details. You can find this tab in the Edit/View Employer section.

Should you require any support in inputting the above or any general questions please do not hesitate to contact the Skillsfirst Assess Team on enquiries@skillsfirstassess.co.uk or telephone 0121 270 5100.

Thank you

End point Assessment Team

Counties	
Avon	Kent
Bedfordshire	Lancashire
Berkshire	Leicestershire
Bristol	Lincolnshire
Buckinghamshire	Merseyside
Cambridgeshire	Norfolk
Cheshire	North Yorkshire
Cleveland	Northamptonshire
Cornwall	Northumberland
Cumbria	Nottinghamshire
Derbyshire	Oxfordshire
Devon	Rutland
Dorset	Shropshire
Durham	Somerset
East Riding of Yorkshire	South Yorkshire
East Sussex	Staffordshire
Essex	Suffolk
Gloucestershire	Surrey
Greater London	Tyne and Wear
Greater Manchester	Warwickshire
Hampshire	West Midlands
Herefordshire	West Sussex
Hertfordshire	West Yorkshire
Humberside	Wiltshire
Isle of Wight	Worcestershire

Appendix 3: Guidance for Importing Apprentice Data

The Guidance for Importing Apprentice Data is your complete guide for successfully registering Apprentices with Skillsfirst Assess.

This document has been designed to help you complete the Import Template – Apprentice Details spreadsheet that is required to populate ePASS with the necessary Apprentice information.

Incorrect or missing information could lead to an audit risk and potential delay in End-point Assessment for the Apprentice.

In accordance with GDPR, it is imperative that the Provider can confirm the Apprentice has given their permission for their personal information to be shared with Skillsfirst.

Apprentice personal details

Please ensure you fill in each column of the Import Template – Apprentice Details spreadsheet to upload each apprentice into ePASS. This information can be input directly from your ILR.

** Mandatory information that must be included in the spreadsheet for a successful upload

*** Only required for Adult Care Worker, Business Administrator, Lead Adult Care Worker, Team Leader/Supervisor and Operations/Departmental Manager

Title	What is required?
Provider UKPRN**	The UK Provider Reference Number of the apprentice's training provider
Provider Postcode	The Training Provider's postcode (if nothing is entered, the Primary Address will be used)
Employer ID**	The EDRS number for the apprentice's employer
Employer Postcode	The Employer's postcode (if nothing is entered, the Primary Address will be used)
ULN**	The apprentice's unique learning number
Title**	The apprentice's title (select Mr; Ms.; Mrs; Miss; Dr; Unknown; Not Given or Other from the available drop down)
Title Other	In the event that an apprentice's title is given as "Other", you must state the apprentice's preferred title
Given Name**	The apprentice's given name
Family Name**	The apprentice's family name
Date of Birth**	The apprentice's date of birth (format as DD/MM/YYYY)
Gender**	The apprentice's gender (select Male; Female; Not given; Unknown or Other from the available drop down)
Gender Other	In the event that an apprentice's gender is given as "Other", you must state the apprentice's gender
Email Address**	The apprentice's email address
Landline Number	The apprentice's landline number (min 10, max 13 characters)
Mobile Number	The apprentice's mobile number (min 10, max 13 characters)
Ethnic Origin	The apprentice's ethnicity (select from the "Ethnic Origin table on Page 3")
Standard**	The full name of the standard the apprentice has been registered on (e.g. Team Leader/Supervisor; Business Administrator; Customer Service Practitioner)
Pathway***	The pathway for the apprenticeship standard (see "Pathway/Subject Reference" table on Page 3)
Subject Reference***	Enter the subject reference to assign your apprentice to their apprenticeship in Surpass for written tests (see "Pathway/Subject Reference" table on Page 3)

Centre Reference***	Enter your Skillsfirst Assess centre reference code to assign your apprentice to your centre in Surpass for written tests (e.g E1000)
Start Date**	The apprentice's apprenticeship start date (format as DD/MM/YYYY)
End Date (expected)**	The apprentice's expected apprenticeship end date (format as DD/MM/YYYY)
EPA Expected Start Date**	The apprentice's expected EPA start date (format as DD/MM/YYYY)
Tutor Name**	The full name of the apprentice's tutor
Line Manager Name**	The full name of the apprentice's line manager
Line Manager Contact**	The best contact for the apprentice's line manager (this can be a telephone number, email address or other forms of contact)
Funding Type**	Is the funding for this apprentice Employer Funded or Government Funded? (select from drop down)

Please check your spelling before submitting your spreadsheet to avoid any errors.

Ensure that all cells that contain dates are formatted as dates. You can do this by right clicking on the columns and selecting "Format Cells". All dates must be formatted as DD/MM/YYYY.

If an Apprentice requires more time than the allocated planned end date due to a disability, then you need to request special recommendation from the Skillsfirst EPA Team. Evidence will be required.

Any necessary documentation can be uploaded to ePASS in the additional details section of the Apprentice, Provider and Employer pages. This could include Portfolio/Showcase, Policies and Procedures or any other relevant documentation requested.

If you have any queries regarding the above or about EPA, please do not hesitate to contact the Skillsfirst Assess team on **0121 270 5100** or via email at enquiries@skillsfirstassess.co.uk.

Thank you

End point Assessment Team

Ethnic Origin	
English / Welsh / Scottish / Northern Irish / British	
Irish	
Gypsy or Irish Traveller	
Other White background	
White and Black Caribbean	
White and Black African	
White and Asian	
Other Mixed/Multiple Ethnic Background	
Not Provided	
Indian	
Pakistani	
Bangladeshi	
Chinese	
Other Asian Background	
African	
Caribbean	
Other Black/African/Caribbean Background	
Arab	
Other ethnic group	

Counties	
Avon	Kent
Bedfordshire	Lancashire
Berkshire	Leicestershire
Bristol	Lincolnshire
Buckinghamshire	Merseyside
Cambridgeshire	Norfolk
Cheshire	North Yorkshire
Cleveland	Northamptonshire
Cornwall	Northumberland
Cumbria	Nottinghamshire
Derbyshire	Oxfordshire
Devon	Rutland
Dorset	Shropshire
Durham	Somerset
East Riding of Yorkshire	South Yorkshire
East Sussex	Staffordshire
Essex	Suffolk
Gloucestershire	Surrey
Greater London	Tyne and Wear
Greater Manchester	Warwickshire
Hampshire	West Midlands
Herefordshire	West Sussex
Hertfordshire	West Yorkshire
Humberside	Wiltshire
Isle of Wight	Worcestershire

Pathway/Subject Reference	
Adult Care Worker	ACW02
Business Administrator	BA03
Lead Adult Care Worker	LACW03
Operations/Departmental Manager	ODM05
Team Leader/Supervisor	TLS03

Appendix 4: End-point Assessment Booking Process

Welcome to Skillsfirst Assess' guide to booking End-point Assessments.

This document will provide you with guidance on how to update the apprentice record, request an End-point Assessment (EPA) and keep tabs on the apprentice's progress.

Step 1:

Before any bookings take place, it is imperative that the apprentice and employer records are updated to include the correct information. A failure to do this could result in the assessor receiving incorrect information and the apprentice being disadvantaged as a result.



Step 2:

In the event that the apprentice is completing an apprenticeship standard where evidence must be submitted prior to the assessment, please upload this to the apprentice record via the Documents section. See the "Booking Rules per Standard" guidance on Page 3 of this document for more information on what is required for each standard.



Step 3:

Once the relevant checks have been made and evidence uploaded, you will need to sign off the apprentice checklist. By signing off the checklist, and uploading any supporting documents that are required, you are confirming that the apprentice is ready to complete their EPA.



Step 4:

The final step you will have to take is booking the apprentice's EPA. To do this, complete our EPA booking form and return it to bookings@skillsfirstassess.co.uk. You can locate the booking form in the Resources section of ePASS.



Step 5:

Skillsfirst have a quality assurance process which includes a review of the apprentice record, ensuring that any relevant evidence has been uploaded and the checklist completed sufficiently. Once happy, we will sign off the apprentice checklist.



Step 6:

Skillsfirst will find the best available Independent End-point Assessor to conduct your apprentice's assessment. We will book the assessment on ePASS and confirm the details via email.

Step 7:

Throughout the apprentice's EPA, you will receive regular updates via automated emails created by ePASS and can keep a track of your apprentice's progress by viewing the "Bookings/Resits" section of the apprentice record.



Step 8:

Once the EPA has been completed and the grade submitted, you will be able to locate the apprentice's result, and any feedback, in the View Completed Assessment(s) section on ePASS.

If you have any queries regarding the Skillsfirst Assess EPA booking process, please contact us on 0121 270 5100 (option 3) or on enquiries@skillsfirstassess.co.uk.

Booking rules per standard

Adult Care Worker Level 2

Assessment types: Situational Judgement Test (SJT); Professional Discussion (PD)

- The apprentice's Self-Evaluations and Witness Testimonies **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- The apprentice **must take and pass** their SJT prior to completing their PD
- Skillsfirst request at least 72 hours' notice to book the SJT in XAMS, our online testing platform
- Skillsfirst request at least 20 working days' notice to book the PD. This will take place remotely via Smart Room technology

Lead Adult Care Worker Level 3

Assessment types: Situational Judgement Test (SJT); Professional Discussion (PD)

- The apprentice's Self-Evaluations and Witness Testimonies **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- The apprentice **must take and pass** their SJT prior to completing their PD
- Skillsfirst request at least 72 hours' notice to book the SJT in XAMS, our online testing platform
- Skillsfirst request at least 20 working days' notice to book the PD. This will take place remotely via Smart Room technology

Customer Service Practitioner Level 2

Assessment types: Apprentice Showcase (AS); Observation (PO) & Professional Discussion (PD)

- The apprentice's AS **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- Skillsfirst request at least 20 working days' notice to book the PO and PD. Both assessments will take place on the same day at the apprentice's work-place
- If the AS is being conducted face-to-face, it will take place on the same day as the PO and PD

Business Administrator Level 3

Assessment types: Knowledge Test (KT); Portfolio Interview (PI); Project Presentation (PP)

- The apprentice's Portfolio and Project **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- Skillsfirst request at least 72 hours' notice to book the KT in XAMS, our online testing platform
- Skillsfirst request at least 20 working days' notice to book the PI and PP. Both assessments will take place remotely via Smart Room technology on the same day

Team Leader/Supervisor Level 3

Assessment types: Assessment of Portfolio of Evidence (PoE); Knowledge Test (KT); Competency Based Interview (CBI); Professional Discussion Relating to CPD Activity (PD)

- The apprentice's Portfolio and CPD Activity **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- You do not need to request a date/time for the PoE
- Skillsfirst request at least 72 hours' notice to book the KT in XAMS, our online testing platform
- Skillsfirst request at least 20 working days' notice to book the CBI and PD. Both assessments will take place remotely via Smart Room technology on the same day

Operations/Departmental Manager Level 5

Assessment types: Knowledge Test (KT); Assessment of Portfolio of Evidence (PoE); Structured Competency Based Interview (CBI); Professional Discussion relating to CPD Activity (PD); Presentation of Work-Based Project (WBP)

- The apprentice's Portfolio, Work-Based Project and CPD Activity **must** be uploaded as evidence to the apprentice record prior to the assessment being booked
- You do not need to request a date/time for the PoE
- Skillsfirst request at least 72 hours' notice to book the KT in XAMS, our online testing platform
- Skillsfirst request at least 20 working days' notice to book the CBI, PD and WBP. Each assessment will take place remotely via Smart Room technology on the same day

Recruitment Resourcer Level 2

Assessment types: Resourcing Project Assignment (RPA); Professional Discussion (PD)

- You do not need to request a date/time for the RPA; Skillsfirst will supply PA within 72 hours following gateway confirmation
- To allow for marking and moderation of RPA, PD will be booked to take place within weeks 5 and 6 post-gateway
- Mark and grade supplied for PD within 8 weeks post gateway confirmation

Recruitment Consultant Level 3

Assessment types: Project Assignment (PA); Professional Discussion (PD)

- You do not need to request a date/time for the PA; Skillsfirst will supply PA to apprentice within 72 hours of receiving booking form
- To allow for marking and moderation of PA, PD will be booked to take place within weeks 8 to 10 post-gateway
- Mark and grade supplied for PD within 12 weeks post gateway confirmation



End-point Assessment Booking Form

PO Number:

*If any unforeseen circumstances arise relating to our face-to-face or remote assessments, the Independent End-point Assessor may be required to contact the apprentice.

****Online and Offline MCQ tests will require different platforms. Skillsfirst will book test online/offline dependant on preference**

***Invigilator details required for standards with MCQ tests only



End-point Assessment Booking Form - Recruitment

PO Number

*If any unforeseen circumstances arise relating to our face-to-face or remote assessments, the Independent End-point Assessor may be required to contact the apprentice.

****An Independent End-point Assessor may be required to ask the apprentice for their Date of Birth as a form of ID, particularly if assessment is conducted by telephone.**