

# End-point assessment plan for Stairlift, Platform Lift, Service Lift Electromechanic apprenticeship standard

Apprenticeship standard reference number	Level of this end point assessment (EPA)	Integrated
ST0251	2	No

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Stairlift, Platform Lift, Service Lift Electromechanic apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to Stairlift, Platform Lift, Service Lift Electromechanic apprentices, their employers and training providers.

Apprentices will typically spend 24 months on-programme (before the gateway) working towards the occupational standard, and complete the required amount of off-the-job training in line with the apprenticeship funding rules. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

As a gateway requirement and prior to taking the EPA, apprentices must complete all approved qualifications mandated in the Stairlift, Platform Lift, Service Lift Electromechanic standard.

These are:

- Level 2 QCF NVQ Diploma in Engineering Maintenance and Installation following an appropriate pathway in installing stairlifts, servicing stairlifts, installing lifting platforms, servicing lifting platforms, installing service lifts or servicing service lifts

The apprentice must have achieved English and mathematics qualifications in line with the apprenticeship funding rules.

The EPA will be completed within an EPA period lasting typically four months, after the apprentice has met the gateway requirements.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

The EPA consists of 3 discrete assessment methods.

The individual assessment methods will have the following grades:

**Assessment method 1:** Multiple Choice Test

- Fail
- Pass
- Distinction

**Assessment method 2:** Practical Assessment with questions

- Fail
- Pass
- Distinction

**Assessment method 3:** Professional Interview underpinned by a portfolio of evidence

- Fail
- Pass
- Distinction

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Fail
- Pass
- Merit
- Distinction

## EPA summary table

<p><b>On-programme</b> (typically 24 months)</p>	<p>Training to develop the occupation standard's knowledge, skills and behaviours.</p> <p>Training towards mandated qualification.</p> <p>Complete training towards English and mathematics qualifications in line with the apprenticeship funding rules.</p> <p>Working towards Level 2 QCF NVQ Diploma in Engineering Maintenance and Installation following an appropriate pathway in installing stairlifts, servicing stairlifts, installing lifting platforms, servicing lifting platforms, installing service lifts or servicing service lifts.</p> <p>Compiling a portfolio of evidence.</p>
<p><b>End-point Assessment Gateway</b></p>	<ul style="list-style-type: none"> <li>• Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard.</li> <li>• Have achieved English and mathematics qualifications in line with the apprenticeship funding rules.</li> </ul> <p>Apprentices must complete the following approved qualifications mandated in the standard:</p> <ul style="list-style-type: none"> <li>• Level 2 QCF NVQ Diploma in Engineering Maintenance and Installation following an appropriate pathway in installing stairlifts, servicing stairlifts, installing lifting platforms, servicing lifting platforms, installing service lifts or servicing service lifts.</li> </ul> <p>Apprentices must submit:</p> <ul style="list-style-type: none"> <li>• A portfolio of evidence compiled during the on-programme period of the apprenticeship containing sufficient evidence to demonstrate the knowledge, skills and behaviours (KSBs) that will be assessed by the professional interview</li> </ul>
<p><b>End Point Assessment</b> (which would typically take four months)</p>	<p>Assessment Method 1: Multiple Choice Test</p> <p>With the following grades:</p>

	<ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul> <p>Assessment Method 2: Practical Assessment with questions</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul> <p>Assessment Method 3: Professional Interview underpinned by a Portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul>
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## Length of end-point assessment period:

The EPA will be completed within a timeframe of typically four months, beginning when the apprentice has passed the EPA gateway.

Any supporting material required for the EPA should be submitted at the gateway.

If an EPA assessment method is failed, it should be resat or retaken in line with the requirements set out in this assessment plan.

## Order of assessment methods

The assessment methods can be delivered in any order.

## Gateway

The apprentice should only enter the gateway once the employer is content that the apprentice is working at or above the occupational standard. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

The EPAO determines when all other gateway requirements have been met, and the EPA period will only commence once the EPAO has confirmed this.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirement prior to beginning EPA:

- achieved the following qualifications as mandated in the occupational standard: Level 2 QCF NVQ Diploma in Engineering Maintenance and Installation following an appropriate pathway in installing stairlifts, servicing stairlifts, installing lifting platforms, servicing lifting platforms, installing service lifts or servicing service lifts.
- have achieved English and mathematics qualifications in line with the apprenticeship funding rules

For Assessment Method 3, Professional Interview underpinned by a portfolio of evidence, the apprentice will be required to submit:

- the portfolio of evidence

### **Portfolio of evidence requirements:**

- apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- it must contain evidence related to the KSBs that will be assessed by the professional interview
- the portfolio of evidence will typically contain ten discrete pieces of evidence
- evidence must be mapped against the KSBs
- evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is required
- evidence sources may include:
  - workplace documentation, records, for example job task sheets, job cards, time sheets, equipment maintenance or service records
  - witness statements
  - customer feedback (maximum one)
  - annotated photographs showing jobs in progress
  - video clips (maximum duration in total 30-minutes)
  - annotated screen shots

- handover records

This is not a definitive list; other evidence sources are allowable

- it should not include any methods of self-assessment
- any employer contributions should focus only direct observation of evidence (for example witness statements) rather than opinions
- the evidence provided must be valid and attributable to the apprentice; the portfolio of evidence must contain a statement from the employer confirming this
- the portfolio of evidence must be submitted to the EPAO at the gateway point

The portfolio is not directly assessed. It underpins the Professional Interview assessment method and therefore should not be assessed by the EPAO. EPAOs should review the portfolio in preparation for the Professional Interview, but are not required to provide feedback after this review of the portfolio.

## Assessment methods

### Assessment Method 1: Multiple Choice Test (This Method has 1 component.)

#### Method 1 Component 1: Multiple Choice Test

This assessment method has one component: multiple-choice test.

#### Overview

The rationale for this assessment method is:

- it allows for the efficient testing of knowledge where there is a right or wrong answer
- it does not require independent assessor time, reducing cost
- it allows for flexibility in terms of when, where and how it is taken
- it is an efficient way to test underpinning knowledge
- it allows larger volumes of apprentices to be assessed at one time

#### Delivery

Apprentices must be assessed against the knowledge and behaviours assigned to this assessment method – as shown in the mapping of KSBs.

The test can be:

- computer based
- paper based

It will consist of 30 questions.

These questions will consist of closed response multiple-choice questions. Apprentices must choose one correct answer from a choice of four.

Each question answered correctly will be awarded one mark. Any incorrect or missing answers must be assigned zero marks.

The multiple choice questions should include:

- Questions based on a scenario (4 questions)

The following topics questions must be scenario based:

- Health and Safety (K2)
- Ethics (B14)

However, after the scenario has been described, the optional responses will still be multiple choice with 1 correct answer from a choice of 4.

### **Test administration**

Apprentices must have a maximum of 60 minutes to complete the test.

The test is closed book which means that the apprentice cannot refer to reference books or materials.

Apprentices must take the test in a suitably controlled environment that is a quiet space, free of distractions and influence, in the presence of an invigilator. The invigilator may be the independent assessor or another external person employed by the EPAO or specialised (proctor) software, if the test can be taken on-line. The EPAO is required to have an invigilation policy that will set out how the test is to be carried out. This will include specifying the most appropriate ratio of apprentices to invigilators to best take into account the setting and security required in administering the test.

The EPAO is responsible for ensuring the security of testing they administer to ensure the test remains valid and reliable (this includes any arrangements made using online tools). The EPAO is responsible for verifying the validity of the identity of the person taking the test.

### **Marking**

Tests must be marked by independent assessors or markers employed by the EPAO following a marking guide produced by the EPAO. Alternatively, marking by computer is permissible where questions types allow this, to improve marking reliability.

Any incorrect or missing answers must be assigned 0 marks. Each question answered correctly will be awarded one mark.

### **Question and resources development**

Questions must be written by EPAOs and must be relevant to the occupation and employer settings. It is recommended that this be done in consultation with employers of this occupation. EPAOs should also maintain the security and confidentiality of their questions



when consulting employers. EPAOs must develop a test specification' and 'question banks' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the questions they contain, are fit for purpose.

## Venue

The EPAO must verify the suitability of the venue for taking the test. Apprentices must take the test in a suitably controlled environment (examination conditions) that is a quiet space, free of distractions and influence, in the presence of an invigilator.

The test can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO, for example a training provider's premises or another employer's premises

## Required supporting material

As a minimum EPAOs will produce the following material to support this method:

- a test specification
- sample tests and mark schemes
- live tests and mark schemes
- a question bank
- live test and mark scheme
- analysis reports which show areas of weakness for completed tests and an invigilation policy

## Assessment Method 2: Practical Assessment with questions (This Method has 1 component.)

### Method 2 Component 1: Practical Assessment with questions

#### Overview

Apprentices must be observed by an independent assessor completing a practical assessment in which they will demonstrate the KSBs assigned to this assessment method. The end-point assessment organisation will arrange for the practical assessment to take place, in consultation with the employer. The practical assessment must be carried out over a total assessment time of 5 hours which includes the questioning.

The independent assessor must conduct and observe only one apprentice during this assessment method.

The rationale for this assessment method is:

- this is a practical role, best demonstrated through completing tasks in a realistic work setting
- practical assessment allows for consistency of activities to be completed and efficiency in scheduling
- questioning allows for the testing of related underpinning KSB's
- it is a holistic assessment method
- work in this occupation tends to take place at customer's premises at short notice making "real work" observation difficult to plan, therefore practical assessment is a good way to test practical skills

## Delivery

The practical assessment with questions may be split into three discrete tasks held over a maximum of 2 working day(s). A working day is typically considered to be 7.5 hours long. The reason for this split is because although it is usually envisaged that this will take place over one working day, this allows some flexibility for both the employer and EPAO. There may be breaks during the practical assessment with questions to allow the apprentice to move from one location to another and for meal or comfort breaks. During these breaks, the clock must be stopped to ensure that the practical assessment duration is not reduced.

EPAOs must manage invigilation of apprentices during breaks in order to maintain security of the assessment in line with their malpractice policy.

The independent assessor has the discretion to increase the time of the practical assessment with questions by up to 10% to allow the apprentice to complete a task or respond to a question.

Apprentices must be provided with information on the tasks they must complete, including the timescales they will be working to before the start of the practical assessment. The time taken to give this information is exclusive of the assessment time.

The apprentice may choose to end any assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or EPAO must ensure the apprentice is fully aware of all assessment requirements. The independent assessor or EPAO cannot suggest or choose to end any assessment methods early (unless in an emergency). The EPAO is responsible for ensuring the apprentice understands the implications of ending an assessment early if they choose to do so. The independent assessor may suggest the assessment continues. The independent assessor must document the apprentice's request to end any assessment early.

The following tasks must be observed during the practical assessment, as a practical assessment without these activities would seriously hamper the opportunity for the apprentice to demonstrate occupational competence against the KSBs assigned to this assessment method:

Typical tasks will include carrying out fault diagnosis, installation and servicing of relevant equipment relating to their chosen option.

- preparation:  
The apprentice will be given a pack which includes risk assessments, method statements, service schedules and manufacturer's specifications. They must read this information within the time allowed for the practical assessment (there is no separate additional time allowance for this). This replicates a real work scenario.
- working activities:  
The apprentice will demonstrate associated KSBs mapped to this assessment method, including mechanical and or hydraulic activities and associated electrical activities such as set-up, service and repair.
- equipment Verification activities:  
The apprentice will check the equipment and return it to normal use.

Each apprentice must work on just one product or item of equipment and this must be appropriate to the selected option.

Apprentices must have access to work instructions and or manuals relating to the equipment/service for reference purposes. These can be electronic and or hard copy.

Apprentices must be observed by an independent assessor completing a practical assessment set by the EPAO and questioned in relation to the activities underpinning KSBs.

Apprentices will be assessed against the KSBs assigned to this assessment method – as shown in the mapping of KSBs.

The independent assessor must ask a minimum of 8 questions to test KSB's. Additional follow-up questions are allowed to seek clarification and to make an assessment against the grading descriptors. Those KSBs that the apprentice did not have the opportunity to demonstrate can be assessed via questioning, although these should be kept to a minimum. The questions can also be asked during the course of the practical assessment, but the independent assessor must take care not to distract the apprentice from the task in hand.

The questions must be taken from a question bank of sample questions prepared by the EPAO but can be adjusted for the individual's specific circumstances.

Practical assessment with questions specifications must be of equal complexity.

The EPAO must arrange the practical assessment with questions, in consultation with the apprentice's employer.

KSBs observed, and answers to questions, must be documented by the independent assessor.

Evidence from the practical assessment with questions must be assessed holistically using the grading criteria for this assessment method.

Independent assessors will make all grading decisions.

EPAOs must ensure that apprentices have a different practical demonstration with questioning specification and set of questions in the case of re-sits or re-takes.

## Questions and resources development

EPAOs will create and set open questions to assess related underpinning knowledge, skills and behaviours.

EPAOs will produce specifications to outline in detail how the practical assessment will operate, what it will cover and what should be looked for. It is recommended that this be done in consultation with employers. EPAOs should put measures and procedures in place to maintain the security and confidentiality of their specifications if employers are consulted. Specifications must be standardised by the EPAO.

## Venue

Practical assessment must be conducted in one of the following locations:

- the employer's premises
- a suitable venue selected by the EPAO (e.g. a training provider's premises or another employer's premises. Where the practical assessments take place on the employer's premises, it is anticipated that the employer will provide the necessary tools and equipment. The EPAO should liaise with the employer to arrange this. Where the practical demonstration take place off-site, the EPAO is responsible for ensuring the apprentice has the appropriate tools and equipment to complete the task. The EPAO may liaise with the employer to provide these)

The EPAO must ensure that the venue has sufficient mechanical, electrical and hydraulic components for which the tasks can be based.

## Support material

EPAOs will produce the following material to support this assessment method:

- guidance for apprentices, employers and training providers that outlines in detail how the practical assessment with questions will operate
- practical assessment task specification bank and question bank. The practical task specification bank and question bank must be of sufficient size to prevent predictability and be reviewed regularly (and at least once a year) to ensure they are fit for purpose. The specifications, including questions relating to underpinning KSBs must be varied, yet allow assessment of the relevant KSBs. It is recommended the specification bank is developed in consultation with employers of this occupation. EPAOs should put measures and procedures in place to maintain the security and confidentiality of their specifications if employers are consulted. Specifications must be standardised by the EPAO.
- assessment recording documentation
- pack including manufacturer's specifications and service schedules
- pack of method statements and risk assessments appropriate to the task
- marking materials

## Assessment Method 3: Professional Interview underpinned by a Portfolio of evidence (This Method has 1 component.)

### Method 3 Component 1: Professional Interview

#### Overview

This assessment will take the form of a professional interview, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. It will involve the questions that will focus on the KSB's assigned to this assessment method and the apprentice may use their portfolio to support their responses.

The rationale for this assessment method is:

- it allows for assessment of KSBs that do not occur on predictable or regular basis
- it allows for testing of responses where there are a range of potential answers that can't be tested through the multiple-choice test
- it is cost effective, as whilst seeking assurance of competence across a range of KSBs, it does not require the independent assessor to directly observe all of them thus reducing their time cost

#### Delivery

The independent assessor will conduct and assess the professional interview.

The professional interview must last for 60 minutes. The independent assessor has the discretion to increase the time of the professional interview by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, in-line with the EPAO's Reasonable Adjustments policy.

The independent assessor must ask a minimum of 14 open questions. Additional follow-up questions are allowed, to seek clarification.

The EPAO must produce a bank of sample questions to assist the independent assessor, but these are for illustration only and the independent assessor should adapt their questions to the apprentice's individual circumstances following a review of their portfolio of evidence. The portfolio of evidence will be submitted to the EPAO at the gateway point and the independent assessor will have a minimum of 5 working days to review this prior to the assessment taking place.

Apprentices can refer to and illustrate their answers with evidence from their portfolio of evidence, however the portfolio evidence is not directly assessed.

Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional interview.

Independent assessors must conduct and assess the professional interview on a one-to-one basis. The professional interview must be appropriately structured to draw out the best of the apprentice's competence.

Apprentices will be assessed against the KSBs assigned to this assessment method – as shown in the mapping of KSBs.

EPAOs must make arrangements for the professional interview with the apprentice's employer.

Evidence from the professional interview underpinned by portfolio of evidence must be assessed holistically using the grading criteria for this assessment method.

Independent assessors will make all grading decisions.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits or re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of professional interviews and reaching consistent judgement.

## Venue

The professional interview can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO, for example a training provider's premises or another employer's premises

Video conferencing can be used to conduct the professional interview, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way for example, by using a 360-degree camera.

Where possible the professional interview should take place on the same day at the practical assessment in order to minimise cost.

## Support material

EPAOs will produce the following material to support this assessment method:

- guidance for apprentices, employers and training providers that outlines in detail how the professional interview supported by a portfolio of evidence will operate
- question banks per option. The professional interview question banks must be of sufficient size to prevent predictability and reviewed regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. It is recommended that questions are developed in consultation with employers of this occupation. EPAOs must maintain the security and confidentiality of their questions when consulting employers.

- assessment recording documentation

## Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

## Grading

See Appendix 1 for grading descriptors.

### Assessment method 1: Multiple Choice Test

The following grade boundaries apply to the test:

#### Grading boundaries

The following grade boundaries apply to the multiple-choice test:

Grade	Minimum mark	Maximum mark
Fail	0	17
Pass	18	23
Distinction	24	30

#### Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

In order to achieve an overall merit, the apprentice must achieve distinction in the practical assessment with questions and a distinction in one of the other assessment methods.

In order to achieve an overall distinction, the apprentice must achieve a distinction in the practical assessment with questions and a distinction in both of the other assessment methods.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment method 1: Multiple Choice Test	Assessment method 2: Practical Assessment with questions	Assessment method 3: Professional Interview	Overall grading
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Pass	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Distinction	Distinction	Merit
Pass	Pass	Distinction	Pass
Distinction	Pass	Pass	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Pass	Merit
Distinction	Distinction	Distinction	Distinction



## Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> <li>• participate in development opportunities to improve their knowledge skills and behaviours as outlined in the standard</li> <li>• meet all gateway requirements when advised by the employer</li> <li>• understand the purpose and importance of EPA and undertake EPA</li> </ul>
Employer	<ul style="list-style-type: none"> <li>• support the apprentice to achieve the KSBs outlined in the standard to their best ability</li> <li>• determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA</li> <li>• select the EPAO</li> <li>• confirm all EPA gateway requirements have been met</li> <li>• confirm arrangements with EPAO for the EPA (who, when, where) in a timely manner</li> <li>• ensure apprentice is well prepared for the EPA</li> <li>• work with the training provider to select the EPAO</li> </ul>
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> <li>• understand the occupational role</li> <li>• appoint administrators, invigilators and markers to administer, invigilate and mark the EPA</li> <li>• provide training and CPD to the independent assessors they employ to undertake the EPA</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and providers to prepare for the EPA</li> <li>• deliver the end-point assessment outlined in this EPA plan in a timely manner</li> <li>• prepare and provide all required material and resources required for delivery of the EPA in-line with best practices</li> <li>• use appropriate assessment recording documentation to ensure a clear and auditable mechanism for providing assessment decision feedback to the apprentice</li> <li>• have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest</li> </ul>

	<ul style="list-style-type: none"> <li>• maintain robust internal quality assurance (IQA) procedures and processes, and conducts these on a regular basis</li> <li>• conform to the requirements of the nominated external quality assurance body</li> <li>• organise standardisation events and activities in accordance with this plan's IQA section</li> <li>• organise and conduct moderation of independent assessors' marking in accordance with this plan</li> <li>• have, and operate, an appeals process</li> <li>• arrange for certification with the relevant training provider</li> <li>• confirm cost of EPAO activities, ideally at the start of the apprenticeship</li> </ul>
Independent assessor	<p>As a minimum an independent assessor should:</p> <ul style="list-style-type: none"> <li>• understand the occupational standard and end-point assessment plan</li> <li>• deliver the end-point assessment in-line with the EPA plan</li> <li>• comply to the IQA requirements of the EPAO</li> <li>• be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest</li> <li>• satisfy the criteria outlined in this EPA plan</li> <li>• hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading</li> <li>• have the capability to assess the apprentice at this level</li> <li>• attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)</li> </ul>
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> <li>• work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the occupational standard and monitor their progress during the on-programme period</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway</li> <li>• work with the employer to select the EPAO</li> <li>• Plays no part in the EPA itself</li> </ul>
Invigilator	<ul style="list-style-type: none"> <li>• To ensure that the apprentice carries out tasks without assistance</li> </ul>

## Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent assessment across employers, places, times and independent assessors
- appoint independent assessors who have specific industry experience, gained in employment within the last 3 years or have significant experience of the occupation or sector, (industry experience must relate to either Stairlift, Lifting Platform or Service Lift Electromechanical)
- appoint independent assessors who have current knowledge evidenced by CPD. (Must be relevant to the option they are assessing)
- appoint assessors who have or be working towards assessor qualifications
- appoint independent assessors who are competent to deliver the end-point assessment
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time
- operate induction training and annual standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time

## Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take any failed assessment methods only.

Re-sits or re-takes must be taken and passed within three-months of the fail notification, otherwise the entire EPA must be re-taken, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

There are no restrictions on overall EPA grading in the case of a re-sit or re-take.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to merit or distinction.

## Affordability

Affordability of the EPA will be ensured by using at least some of the following practice:

- using employers' existing facilities for the practical assessment with questions
- online testing for multiple-choice test
- using an employer's venue for the professional interview supported by portfolio of evidence and multiple-choice test
- using video conferencing for the professional interview supported by portfolio of evidence
- the possibility of scheduling some assessment methods on the same day

## Professional body recognition

Professional body recognition is not relevant to this occupational apprenticeship.

## Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

# Mapping of knowledge, skills and behaviours (KSBs)

## Assessment method 1: Multiple Choice Test

### Core Knowledge

**K1** Risk assessment, method statements and manufacturer instructions in relation to either installation, or service and repair.

**K2** Industry specific safety Standards and legislation, such as working at height and electrical isolation methods in respect of one's own safety and of others.

**K6** The principles and operation of components making up a Stairlift, Lifting Platform or Service Lift system.

**K9** When and how to seek guidance where planning activities are beyond their individual scope of involvement.

**K10** Planning, unloading and storage of materials, applying knowledge of manual handling.

### Core Behaviours

**B14** How to challenge any obviously unethical decisions or actions taken by others.

### Option 1 – Stairlift Installation Knowledge

**K11** The principles, practices and legislation for the installation and testing of stairlifts including; rack and pinon systems, hinge rail systems, and the installation requirements for straight and curved stairlift designs.

### Option 2 – Stairlift Service and Repair Knowledge

**K12** The principles, practices and legislation for the servicing and maintenance of stairlift systems including; Battery charging systems, printed circuit boards, wiring looms, chair swivel systems, hinged rail systems and stairlift safety devices.

### Option 3 – Lifting Platform Installation Knowledge

**K13** The principles, practices and legislation for the installation and testing of lifting platforms including; shaft structures, aperture frames, hydraulic and mechanical systems, safety devices, and traction systems.

### Option 4 – Lifting Platform Service and Repair Knowledge

**K14** The principles, practices and legislation for the servicing and maintenance of lifting platform systems including; safety interlock systems, control systems, wiring looms and safety gear, rupture valve and overspeed protection systems.

### Option 5 – Service Lift Installation Knowledge

**K15** The principles, practices and legislation for the installation and testing of service lifts including; shaft structures, aperture frames, hydraulic and mechanical systems, safety devices, and traction systems.

### Option 6 – Service Lift Service and Repair Knowledge

**K16** The principles, practices and legislation for the servicing and maintenance of service lift systems including; safety interlock systems, control systems, wiring looms and safety gear, rupture valve and overspeed protection systems.

## Assessment method 2: Practical Assessment with questions

### Core Knowledge

**K2** Industry specific safety Standards and legislation, such as working at height and electrical isolation methods in respect of one's own safety and of others.

**K3** Correct use of personal protective equipment.

**K5** The principles and operation of components making a Stairlift, Lifting Platform or Service Lift system. The use of tools and measuring instrumentation and fault-finding techniques for mechanical equipment.

**K7** The principles and operation of electrical and electronic control systems. The use of tools and measuring instrumentation and fault-finding processes for electrical and electronic systems.

### Core Skills

**S1** Apply risk assessments and implement risk control measures.

**S2** Follow method statements in relation to specific work activities work responsibly in safety-critical environments.

**S4** Use mechanical equipment such as torque wrenches, measuring equipment etc.

**S5** Use electrical and electronic measuring tools, to carry out fault diagnosis using a range of approved methods. Be able to wire a system as per the electrical wiring schematic.

### Core Behaviours

**B2** Working safely and understanding the effects of their acts or omissions on others. Developing a 'safety-first' mentality.

**B12** Working to company codes of practice for safe working and code of conduct.

### Option 1 – Stairlift Installation Skills

**S7** Set up stairlift systems for example, curved and straight rail systems.

**S8** Check stairlift components for correct operation, alignment, and the security of fixings. Commission and test installations, place into use.

### Option 2 – Stairlift Service and Repair Skills

**S9** Carry out service and repair on stairlifts including, checking for correct operation and integrity, ensuring the ride quality is smooth.

**S10** Check positioning systems are set up and that they are working to specification.

**S11** Check stairlift travel requirements. Check function and safety and return to normal use.

### Option 3 – Lifting Platform Installation Skills

**S12** Set up systems for example, hydraulic or mechanical used on lifting platforms, and check components for correct operation. Commission and test installations, place into use.

### Option 4 – Lifting Platform Service and Repair Skills

**S13** Carry out service and repair on lifting platforms including, checking systems for correct operation and integrity.

**S14** Check lifting platform positioning systems and travel requirements are set up and that they are working to specification.

**S15** Use tools, measuring instrumentation and fault-finding processes for hydraulic systems.

**S16** Check function and safety and return to normal use.

### Option 5 – Service Lift Installation Skills

**S17** Set up systems for example, hydraulic or mechanical used on service lifts, check components for correct operation. Commission and test installations, place into use.

### Option 6 – Service Lift Service and Repair Skills

**S18** Carry out service and repair on service lifts including, checking systems for correct operation and integrity, ensuring the ride quality is smooth.

**S19** Check service lift positioning systems and travel requirements are set up and that they are working to specification. Check function and safety and return to normal use.

## Assessment method 3: Professional Interview supported by a Portfolio of evidence

### Knowledge

**K4** Environmental recycling and disposal processes.

**K8** Engineering drawings, documentation, regulations, Standards and manuals.

### Skills

**S3** Select adjust and set up mechanical components as per product design, including safety components, using mechanical tools and measuring equipment.

**S6** Communicate with the customer in a professional manner and schedule work efficiently; to read engineering drawings and documentation, regulations, Standards and manuals, using them to carry out fault diagnoses, inspection and repair; to write legible reports.

### Behaviours

**B1** Hazards and consequences of their working methods and environment; not only for themselves but colleagues and members of the public.

**B3** When to seek advice and guidance if a problem is beyond their scope of knowledge and competence.

**B4** Treating others with dignity and respect.

**B5** Different viewpoints and needs, actively listening and co-operating with others creating trust and team spirit.

**B6** Self-development and progression.

**B7** Making independent decisions concerning their work practices.

**B8** Meeting goals and objectives with a positive approach, to their own needs.

**B9** Communicating positively with managers, clients and members of the public and contributing to team meetings.



<b>B10</b> Encouraging two-way communication and actively listening, and seeking feedback so communication is clear and understood.
<b>B11</b> Eco-efficient values, respect of work place environment, others, property and their tools in the way they operate and work.
<b>B13</b> A high ethical and professional standard, treating others with respect and honesty.

## Appendix 1

### Grading descriptors for each assessment method

#### Practical Assessment with questions – Assessment method 2

#### Core grading descriptors

Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria for the core KSBs and their chosen option
<b>Health and Safety</b> K2. Industry specific safety Standards and legislation, such as working at height and electrical isolation methods in respect of one's own safety and of others. K3. Correct use of personal protective equipment.	Demonstrates that they are following safety standards and legislation, referring to and following the risk assessment, following the correct method statement and taking measures to keep themselves and others safe.	

<p>S1. Apply risk assessments and implement risk control measures.</p> <p>S2. Follow method statements in relation to specific work activities work responsibly in safety-critical environments.</p> <p>B2. Working safely and understanding the effects of their acts or omissions on others. Developing a 'safety-first' mentality.</p> <p>B12. Working to company codes of practice for safe working and code of conduct.</p>		
<p><b>Practical application</b></p> <p>K5. The principles and operation of components making a Stairlift, Lifting Platform or Service Lift system. The use of tools and measuring instrumentation and fault-finding techniques for mechanical equipment.</p> <p>K7. The principles and operation of electrical and electronic control systems. The use of tools and measuring instrumentation and fault-finding processes for electrical/ electronic systems.</p> <p>S4. Use mechanical equipment such as</p>	<p>Applies the correct principles and operation of Electrical, Mechanical and electronic components.</p> <p>Selects and uses the correct tools, equipment and instrumentation to diagnose a fault on mechanical, electrical and electronic components.</p> <p>Wires a system as per the electrical schematic drawing.</p>	<p>Explains the integration and interfacing of components.</p> <p>Justifies their choices of tools, equipment and instrumentation.</p>

<p>torque wrenches, measuring equipment etc.</p> <p>S5. Use electrical and electronic measuring tools, to carry out fault diagnosis using a range of approved methods. Be able to wire a system as per the electrical wiring schematic.</p>		
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## Options grading descriptors

Option 1 – Stairlift Installation		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<p><b>Working to specification</b></p> <p>S7. Set up stairlift systems for example curved and straight rail systems.</p>	Demonstrates stairlift system set up as per manufacturer's specification.	
<p><b>Verification</b></p> <p>S8. Check stairlift components for correct operation, alignment, and the security of</p>	Verifies all components are fitted correctly as per specification and are functioning correctly.	Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.

fixings. Commission and test installations, place into use.	Completes final test installation prior to use.	
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<b>Option 2 – Stairlift Service and Repair</b>		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<b>Service and Repair</b> S9. Carry out service and repair on stairlifts including, checking for correct operation and integrity, ensuring the ride quality is smooth.	Follows the servicing schedule and makes any required adjustments.  Replaces components as per manufacturer's instruction.	Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.
<b>Working to specification</b> S10. Check positioning systems are set up and that they are working to specification.  S11. Check stairlift travel requirements. Check function and safety and return to normal use.	Set up system as per specification.	

<b>Option 3 – Lifting Platform Installation</b>		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<b>Verification</b> S12. Set up systems for example, hydraulic or mechanical used on lifting platforms, and check components for correct operation. Commission and test installations, place into use.	Verify all components are set up in accordance with manufacturer's specification and are functioning correctly.  Completes final test installation prior to use.	Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.

<b>Option 4 – Lifting Platform Service and Repair</b>		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<b>Service and Repair</b> S13. Carry out service and repair on lifting platforms including, checking systems for correct operation and integrity.	Follows the servicing schedule and makes any required adjustments.  Replaces components as per manufacturer's instruction.	Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.
<b>Verification</b> S14. Check lifting platform positioning	Verify components are fitted correctly and are functioning correctly.	

<p>systems and travel requirements are set up and that they are working to specification.</p> <p>S16. Check function and safety and return to normal use.</p>	<p>Completes final test installation prior to use.</p>	
<p><b>Practical application</b></p> <p>S15. Use tools, measuring instrumentation and fault-finding processes for hydraulic systems.</p>	<p>Select and use the correct tools, measuring instrumentation and fault finding processes for hydraulic systems in accordance with manufacturers' instructions.</p>	

<b>Option 5 – Service Lift Installation</b>		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	<p>In order to achieve a pass, all of the pass criteria must be met</p>	<p>In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria</p>
<p><b>Verification</b></p> <p>S17. Set up systems for example, hydraulic or mechanical used on service lifts, check components for correct operation. Commission and test installations, place into use.</p>	<p>Set up systems and components in accordance with manufacturer's instructions. Verify safety components are fitted correctly and are functioning correctly.</p> <p>Completes final test installation prior to use.</p>	<p>Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.</p>

Option 6 – Service Lift Service and Repair		
Practical Assessment with questions (Assessment Method 2)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<b>Verification</b> S18. Carry out service and repair on service lifts including, checking systems for correct operation and integrity, ensuring the ride quality is smooth.	Carry out service and repair in accordance with manufacturers' instructions and check that they are fitted correctly and that the ride quality is smooth.	Work completed in order that optimises use of time, for example does not have to redo work, avoids unnecessary actions.
S19. Check service lift positioning systems and travel requirements are set up and that they are working to specification. Check function and safety and return to normal use.	Verify components are fitted correctly and are functioning correctly.  Completes final test installation prior to use.	

## Professional Interview supported by a portfolio of evidence – Assessment method 3

### Core grading descriptors

Professional Interview supported by a portfolio of evidence (Assessment Method 3)		
Grouping	Pass Criteria	Distinction Criteria
	In order to achieve a pass, all of the pass criteria must be met	In order to achieve a distinction, the apprentice must meet all of the pass and all of the distinction criteria
<p><b>Environment &amp; Hazards</b></p> <p>K4. Environmental recycling/ disposal processes.</p> <p>B1. Hazards and consequences of their working methods and environment; not only for themselves but colleagues and members of the public</p> <p>B11. Eco-efficient values, respect of work place environment, others, property and their tools in the way they operate and work.</p>	<p>Describes the difference between hazardous waste and non-hazardous waste and explains options for correct disposal/recycling.</p> <p>Explain how they identify hazards and explain the safety implications of their working methods and the environment in which they are working and the impact on themselves and others.</p> <p>Describes how they have taken care of their workplace, environment and tools in an eco-efficient manner.</p>	<p>Explains the impact of not respecting eco-efficient values and how that reflects on the business.</p> <p>Explains the control measures they have put in place within their working environment.</p>
<p><b>Engineering processes</b></p> <p>K8. Engineering drawings, documentation, regulations, Standards and manuals.</p> <p>S6ii. To read engineering drawings</p>	<p>Describes the purpose of engineering drawings, documents, manuals, standards and regulations and explains how they use them.</p>	<p>Explains the benefits of specific standard(s) suggested by the assessor which is appropriate to products within their selected option and explains the use manuals in relation to that product.</p>



<p>and documentation, regulations, standards and manuals, using them to carry out fault diagnoses, inspection and repair.</p>		
<p><b>Set up procedures</b></p> <p>S3. Select adjust and set up mechanical components as per product design, including safety components, using mechanical tools and measuring equipment.</p>	<p>Describe how they select, adjust and set up mechanical components using mechanical tools and measuring equipment and describes why they selected and adjusted that component.</p>	<p>Explains the importance and impact of accurate set-up and the implications of using incorrect or poor quality parts.</p>
<p><b>Communication</b></p> <p>S6i. Communicate with the customer in a professional manner and schedule work efficiently; to write legible reports.</p> <p>B4. Treating others with dignity and respect.</p> <p>B5. Different viewpoints and needs, actively listening and co-operating with others creating trust and team spirit.</p> <p>B9. Communicating positively with managers, clients and members of the public and contributing to team meetings.</p>	<p>Describes how they use a handover document and describes what they took into account when preparing it.</p> <p>Describes how they use a range of communication methods with a range of stakeholders, in a manner appropriate to the target audience using appropriate language.</p> <p>Explains how their contribution to team meetings makes a difference.</p> <p>Describes the importance of scheduling work efficiently and advises how they achieve that.</p> <p>Describes how they treat others with dignity and respect, how they encourage two way communication and the techniques they to use to develop trust.</p>	<p>Explains the importance of recording information on works carried out correctly for the customer and the organisation and the consequences of not doing so.</p> <p>Justifies their approach and choice of communication methods to resolve problems or difficult situations.</p> <p>Explains how they manage conflict responsibly.</p> <p>Explains how their professional values, including integrity and honesty improves business outcomes.</p>

<p>B10. Encouraging two-way communication and actively listening, and seeking feedback so communication is clear and understood.</p> <p>B13. A high ethical and professional standard, treating others with respect and honesty.</p>	<p>Explains how their professional values, including integrity and honesty improves their outcomes.</p>	
<p><b>Professional boundaries</b></p> <p>B3. When to seek advice and guidance if a problem is beyond their scope of knowledge and competence.</p> <p>B7. Making independent decisions concerning their work practices.</p>	<p>Describes how they know when to make an independent decision and when to seek guidance when the situation is beyond their scope of knowledge and competence and describes their organisation's process for doing so.</p>	
<p><b>Development</b></p> <p>B6. Self-development and progression.</p> <p>B8. Meeting goals and objectives with a positive approach, to their own needs.</p>	<p>Describe the progress made on goals and objectives and describes how they established future areas for self-development.</p>	<p>Describes a 5 year career plan and how they will achieve set goals and targeted time scales.</p>