

Accounts / Finance Assistant Apprenticeship Standard, Level 2

End-Point Assessment Plan

End-Point Assessment (EPA) plan for: Accounts / Finance Assistant at Level 2**Summary of assessment**

This document sets out the requirements for end-point assessment (EPA) for the Accounts/Finance Assistant apprenticeship standard. It is written for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to accounts/finance assistant apprentices, their employers, and training providers.

The accounts/finance assistant apprenticeship standard details the knowledge, skills and behaviours (KSBs) expected of a competent accounts/finance assistant. Apprentices will typically spend 12-15 months working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

The EPA has two distinct assessment methods which have been designed to be completed only once the apprentice has finished the on-programme learner journey demonstrated and passed through the Gateway, as set out in appendix 1.

The assessment methods can be taken in any order and will need to be passed after a minimum of 12 months of on-programme learning (OPL) in order for the apprentice to be awarded the Apprenticeship certification. There is no need to pass one component before moving to another.

The two EPA assessment methods are:

1. Structured interview.
2. Written assignment

All assessment activities must be successfully completed within a 6 month end-point assessment window. The EPA assessment window commences when the employer confirms that the apprentice has successfully passed through the gateway.

Each of the knowledge, skills and behaviours included in the published Apprenticeship Standard is mapped to one of the two assessment methods. This is set out in the following EPA overview table.

To achieve final certification, the apprentice must have achieved a minimum of a pass in each assessment method. A pass in the EPA will demonstrate that the apprentice can apply the KSBs required by this apprenticeship standard. Apprentices achieving a distinction will be demonstrating performance above the minimum requirements of the occupational standard.

EPA Overview			
Assessment Method	Area Assessed	Assessed by	Grading
Structured interview	<ol style="list-style-type: none"> 1. Teamwork 2. Professionalism 3. Customer focus 4. Ethical standards 5. General business 6. Understanding your organisation 7. Personal effectiveness 	End Point Assessment Organisation (EPAO)	Fail/Pass/Distinction
Written assignment	<ol style="list-style-type: none"> 8. Accounting systems and process 9. Basic accounting 10. Attention to detail 11. Communication 12. Uses systems and processes 13. Personal development 	End Point Assessment Organisation (EPAO)	Fail/Pass

End-point assessment gateway requirements

The EPA should only start once the employer is satisfied that requirements for EPA gateway have been met and can be evidenced to an EPAO.

Requirements

The employer must be satisfied that the apprentice is consistently working at or above the level set out in the occupational standard. Employers may wish to take advice from their apprentice's training provider(s).

The employer must also consider if the apprentice has gained the required experience in the workplace and met the minimum requirements in regard to knowledge, skills and behaviours within the standard. Once the employer is satisfied the apprentice has demonstrated full competence and that all criteria of the standard has been met, the apprentice can progress to the end-point assessment.

English and mathematics

Apprentices without Level 1 English and mathematics will need to achieve this level prior to taking their end-point assessment. Entrants can take the Level 1 Functional Skill or GCSE in English and Level 1 Functional Skill or GCSE in mathematics.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3.

The British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.

Mandatory qualifications

The gateway requires competence to be demonstrated via achievement of one of the following Level 2 qualifications:

- AAT Foundation Certificate in Accounting (Level 2)
- ACCA Certificate in Financial and Management Accounting (Level 2)
- IAB Level 2 Certificate in Bookkeeping
- ICB Level 2 Certificate in Bookkeeping

The EPA must be completed over a maximum period of 6 months, after the apprentice has met the EPA gateway requirements.

Assessment methods

Requirements for each assessment method are detailed below:

Assessment Method 1. Structured Interview

The structured interview will last for 45 minutes and the independent assessor must have prepared 8 questions, however the questions may be modified to take account of the evidence. The interview will be conducted remotely via a webcam platform or telephone. This assessment must be treated as an external assessment to take place in a controlled environment to the satisfaction of the EPAO.

For SKYPE or similar, the apprentice must show their proof of ID to the independent assessor appointed by the EPAO. For telephony, it is the responsibility of the employer to provide satisfactory proof of the apprentice's identity before commencing the interview.

The structured interview will be conducted by an independent assessor, appointed by the EPAO. The interview will assess the knowledge, skills and behaviours as outlined in appendix 2.

For the structured interview:

- Prior to the interview the independent assessor will pre-prepare the questions based on the standard outcomes from their test bank; all eight questions must be asked. Clarification questioning is permitted in order to explore the apprentices given answers to the eight questions.
- End-point assessment organisations need to maintain question banks of sufficient size to ensure the questions are selected randomly so that the test questions remain valid and prevent the assessments from being predictable, including re-sits. These questions banks should be reviewed regularly (at least once a year).
- End-point assessment organisations need to have in place processes and procedures to review the question banks regularly to ensure the questions they contain are fit-for-purpose.
- The I/A on behalf of the EPAO must schedule the interview to take place at an agreed time and place, giving both the apprentice and the independent assessor a minimum of two weeks' notice of the time, date and venue. It is the employers responsibility to provide a suitable venue for the interview to take place.
- The interview should take place on a one-to-one basis between an independent assessor and an apprentice via the prescribed methods.
- The interview must take place in a quiet room away from workplace distraction and influence.
- The EPAO must specify any equipment and software required for the interview.
- EPAOs must ensure any reasonable adjustments are in place and apprentices must make any requirement requests at least 1 week prior to the scheduled date for the interview.
- I/As must in writing document the apprentices responses against the Knowledge Skills and Behaviours via pre-prepared template forms, any subsequent appeals will be reviewed against documented evidence. Appeals will only seek to ensure that due process was followed.
- Questions must seek to assess competence and / or depth of understanding to assess performance against the pass and distinction criteria.
- Independent assessors must assess the interview and award a fail, pass or distinction grade to the EPAO.
- The EPAO will create a report template for the assessor to submit to confirm the grade.

Assessment Method 2. Written Assignment

The written assignment must be completed after the gateway. The Apprentice will be required to answer 8 questions set by the EPAO. The questions will require the Apprentice to give examples relating to their own real-work experience. The Apprentice must provide their answers in writing.

By its very nature, the Accounts/Finance Assistant Occupation requires accurate and detailed written work, and so this assessment method is an appropriate and manageable way of testing occupational competency.

The questions will be divided into 4 questions relating to “Accounts & Business” and a further 4 questions relating to “Business communication and personal skills”.

Apprentices will be asked to structure each of their responses to include:

- Background and context to the scenario identified in the question;
- A description of their role, responsibilities and of the actions within the specific scenario;
- Evidence of learning and of clear outcomes for the apprentice, their organisation and the customer.

The written assignment should be a total of 2000 words (+/- 10% this will be at the discretion of the independent assessor in order to provide scope for an apprentice to demonstrate their full abilities) excluding annexes. (Up to 1 Annex may be provided per answer and will be no more than 1 page of A4 paper in length. An Annex will only be graphical/numerical)

For the written assignment

- Responsibility for setting the assignment rests with the EPAO who will ensure in discussion with the employer that it is relevant to the apprentice and to their workplace setting. The Independent Assessor will select the 8 questions from the EPAO question bank.
- EPAOs must develop ‘test banks’ of sufficient size to prevent predictability and review them at least once per year to ensure they, and the questions they contain, are fit for purpose.
- Once scheduled the apprentice will have six weeks in which to complete the written assignment. It will then be submitted to the EPAO for grading by their appointed independent assessor.
- The assignments are open book. This means that apprentices are able to refer to additional materials, such as class notes, textbooks, or other support material while producing their written assignment. It is the employers’ responsibility to ensure the apprentice has sufficient time to complete the assignment. The employer is also responsible for verifying to the EPAO that the assignment is the apprentices own work and should confirm this declaration to the EPAO.
- The assignment must be made in writing by the apprentice. This should be done electronically for upload to EPAO assessment systems.
- EPAOs must ensure any reasonable adjustments requested and agreed are in place and apprentices must make any requirement requests via their independent assessor when the assignments are scheduled.

End-point-final judgement

Independent assessors must allocate a grade of fail or pass or distinction for the assessment methods.

Grading			
The structure for both components of the assessment are shown in the table below and the grade is decided by the EPAO.			
EPA Assessment component	Assessment Grade	Assessment Grade	Assessment Grade
Structured interview	Fail	Pass	Distinction
Written assignment	Fail	Pass	N/A (Only the structured interview assessment contributes to the overall distinction grade due to opportunities provided by a direct interview)
<p>Performance in the EPA will determine the apprenticeship grade of fail, pass, or distinction. EPAOs must grade the EPA according to the requirements set out in this plan. Restrictions on grading normally apply where apprentices re-sit/re-take an assessment method – see re-sit/re-take section below.</p> <p>Independent assessors must individually grade the two assessment methods. To achieve a pass, the apprentice must achieve a minimum of a pass in each assessment method. To achieve a distinction, the apprentice must achieve all of the pass criteria and the distinction criteria in the structured interview.</p> <p>If the apprentice fails on any one assessment method, then the final grade awarded will be a fail.</p> <p>The grades for each apprentice is calculated by the EPAO using the grades awarded for each of the stages of EPA. Any requirements for moderation, review or grade limitations must be applied before the final grade is awarded.</p> <p>The knowledge, skills and behaviors to be assessed by each assessment method are summarised in annexe A. The grade descriptors for the written assignment and structured interview are summarised in appendix 2.</p>			
Re-sits			
<p>Apprentices who fail one or more assessment methods will be offered the opportunity to take one re-sit/re-take across the one or two methods of assessment they have failed, or across all of them if they received an overall fail. 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/re-take. The apprentice's employer will need to agree that a re-sit/re-take is an appropriate course of action. Full feedback will be provided for both the apprentice and their employer.</p> <p>Any assessment method re-sit/re-take must be taken during the maximum EPA period, otherwise the entire EPA must be retaken, unless in the opinion of the EPAO exceptional</p>			

circumstances apply outside the control of the apprentice or their employer.

If the written assignment is awarded a fail, the apprentice will be asked to rework the assignment in line with feedback from the independent assessor. They will not be asked to complete a new assignment.

Re-sits/re-takes are not offered to apprentices wishing to move from pass to distinction. Where any assessment method has to be re-sat/re-taken, the apprentice may not be awarded a distinction, unless the EPAO determines there are exceptional circumstances requiring a re-sit/re-take. Under normal circumstances only a pass is available to apprentices who have re-taken or re-sat part of their EPA.

There is no limit to the number of re-sits or re-takes.

Roles and responsibilities, ensuring independence

Apprentice	<ul style="list-style-type: none"> • ensures assignments are completed in a timely manner • progresses through requirements of the standard and successfully completes the mandated qualification.
Independent Assessor	<ul style="list-style-type: none"> • carries out independent assessment of the apprentice and makes final decision whether the apprentice meets the knowledge, skills and behaviours set out in the standard • holds at least a Level 3 accounting or finance qualification • marks the written assignment and conducts the structured interview and recommends an overall fail, pass, or distinction.
Employer	<ul style="list-style-type: none"> • ensures that the apprentice is given the necessary support • makes decision on whether or not the apprentice moves through the gateway to EPA • uses performance management process and regular one to one to discuss progress and provide feedback and guide development • takes part in regular check points between the employer and training provider.

Training provider	<ul style="list-style-type: none"> • Registered on the Education and Skills Funding Agency's (ESFA) Register of Apprenticeship Training Providers (RoATP) • provides off-the-job element of on-programme learning • manages administration, preparation, operation and invigilation of the mandatory qualifications assessment.
EPAO	<ul style="list-style-type: none"> • registers on the ESFA and RoEPAO • develops the detailed criteria for grading the assessment methods and overall grade • develops tools for collecting & measuring evidence • recruits and trains independent assessors • ensures effective quality assurance and quality control procedures that support fair, reliable and consistent assessments across organisation and over time • accountable for quality assurance of the end-point assessment as described in the assessment plan.
EPAO Internal Quality Assurance (IQA)	
<p>EPAO will have robust and effective quality assurance and quality control procedures to ensure the EPA is applied consistently must include:</p> <ul style="list-style-type: none"> • specifying levels of moderation that must be applied. At least a minimum of two moderation meetings per year • stipulating essential occupational and assessment knowledge, skills and experience you would expect an assessor to have; and any continued professional development requirements: <ul style="list-style-type: none"> ○ an accounting qualification equivalent to, or higher than the level for this apprenticeship ○ have proven occupational competence ○ hold the A1 assessor award or the Level 3 award in assessing vocationally related achievement (QCF). • giving the minimum frequency at which assessors should meet to standardise assessment practices within their individual end-point assessment organisations. Should be a minimum of twice a year • specifying the tools, materials or techniques to be used in the assessment • describing the processes for benchmarking performance, moderating assessments and reviewing standards over time and across different locations • effective recruitment and training practices that enable their staff to deliver end-point assessments effectively • quality assurance systems that support fair, reliable and consistent assessment across organisations and over time. 	
External quality assurance (EQA)	
EQA will be conducted by the Institute for Apprenticeships	

Feasibility, Manageability and Affordability

This End-Point Assessment Plan has been designed to ensure that assessments can be practically delivered within the defined constraints and to the specified scale at reasonable cost.

The level 2 Finance/Accounts Assistant occupation is comparatively very high volume and is the recognised entry level occupation into the broader sector of Finance and Accounting. Employers are spread across the whole of England.

In the first year, 1000 apprentices are likely, rising to 3000 in the second year and beyond.

Trailblazer group members identified the two chosen assessment methods as appropriate and proportionate at this level. They also recognised the importance of direct contact between the apprentice and the independent assessor, but from experience also identify that costs can increase if the structured interview meeting is face-to-face. Using technology instead will help keep cost down and also assist the EPAO's to manage predicted high volumes.

As the completion of the assignment is open-book, meaning the apprentice may use employer premises, there are no significant overheads adding to cost.

Appendix 1: The learner journey

Recommended Learner Journey				
Month	Apprentice	Employer	Training Provider	End-Point Assessment Organisation
0	Understand job role and apprenticeship commitment	Deliver induction training and understand role in apprenticeship	Explain apprenticeship, roles, timetable and commitments. Provides initial diagnostic assessment.	
1-12	Works to role objectives / KPIs/ training plan Develops Knowledge, Skills and Behaviours in line with learning outcomes. Studies and takes professional qualifications/units	Manages as any other employee including Performance Management via regular 1to1s Supports, trains and coaches	Monitors progress; identifies gaps; delivers apprentice learning and supports as required. Supports, trains and coaches	
12	'Gateway' to end point assessment: Employer is satisfied the Apprentice has achieved competency levels required and has attained the necessary mandatory qualifications			
12-15	Completes written assignment. Submits for assessment. Takes part in Structured Interview	Confirms the assignment is the apprentices own work		Sets and grades the written assignment and conducts and grades the Structured Interview. Determines the overall apprenticeship grade.

Annex A: Knowledge, skills and behaviours to be assessed by each assessment method

Key

Assessment method 1 – Structured Interview (INT)

Assessment method 2 – Written Assignment (WA)

Ref	Criteria	Knowledge to be assessed	Assessment Method
K1	General Business	<ul style="list-style-type: none"> • Aware of elements of commercial law that may have an impact when working in accountancy, such as contracts, data protection or Anti Money Laundering • Can explain the importance of upholding relevant codes of conduct • Can explain different legal entities and organisational structures. • Aware of the impact of technology on business and its accounting and finance functions. 	INT
K2	Understanding your organisation	<ul style="list-style-type: none"> • Understand own role within the context of your organisation • Understand transactional processes of accounting and their use within a finance function • Understand what makes a business or organisation successful, through either buying or selling products or supplying services to a market. 	INT
K3	Accounting Systems & Processes	<ul style="list-style-type: none"> • Understand how accounting systems and processes allows a business to keep track of all types of financial transactions • Know a range of routine accounts reports, reports and their use within the finance function • Understand the basics of internal control within own organisation. 	WA
K4	Basic Accounting	<ul style="list-style-type: none"> • Aware of basic accountancy concepts and double entry bookkeeping • Understands bookkeeping controls • Understand the cost recording system within an organisation • Develop an understanding of the differences between Financial and Management Accounting. 	WA
K5	Ethical Standards	<ul style="list-style-type: none"> • Understands corporate social responsibility (CSR), ethics and sustainability within organisations • Understands the importance of the need to keep up-to-date with relevant policies, procedures, regulatory or system changes 	INT

Ref		Skills to be assessed	Assessment Method
S1	Attention to Detail	<ul style="list-style-type: none"> • The ability to examine data to identify issues • The ability to reconcile data to minimise the chance of errors • The ability to plan and review work • Recognise and rectifies errors. 	WA
S2	Communication	<ul style="list-style-type: none"> • Deals effectively with a range of stakeholders using appropriate communication methods to deliver accurate and timely results • Avoids jargon and uses the correct technical terms where appropriate • Demonstrates good listening and speaking skills to be able to communicate effectively in the right manner. 	WA
S3	Uses Systems and processes	<ul style="list-style-type: none"> • Utilises relevant office/accounting software packages to input and manage data accurately • Ability to maintain the security of accounting information using passwords and other appropriate security measures. 	WA
S4	Personal Effectiveness	<ul style="list-style-type: none"> • Ability to organise self, prioritise workload/activity to meet deadlines. • Actively identifies team workload problems and offers to support peers where appropriate • Ability to understand issues beyond own remit 	INT

Ref		Behaviours to be assessed	Assessment Method
B1	Team Work	<ul style="list-style-type: none"> • Supports colleagues and collaborates to achieve results • Builds working relationships within own team and other parts of the organisation • Be aware of their impact on others. 	INT
B2	Personal Development	<ul style="list-style-type: none"> • Successfully implements changes that are required, as directed. • Displays an ongoing commitment to learning and self-improvement. • Seeks feedback and acts on it to improve their performance. 	WA
B3	Professionalism	<ul style="list-style-type: none"> • Looks to behave professionally by adhering to the organisational code of conduct • Has a 'right first time' approach. • Shows integrity in their approach • Demonstrates personal pride in the job through appropriate dress and positive and confident language. 	INT
B4	Customer Focus	<ul style="list-style-type: none"> • Builds and maintains customer satisfaction with the products and services offered by the organisation in line with company policy, regulation and practice. • Delivers excellent service, identifying and meeting or exceeding customer expectations. 	INT

Appendix 2: Grading descriptors

Knowledge area:	What is required for occupational competence?	Fail Criteria: the apprentice does not provide sufficient evidence to demonstrate that their performance meets the requirements of the pass criteria:	Pass Criteria: the apprentice must display all of the following:	Distinction Criteria: the apprentice must display all of the pass criteria and all of the following when applicable to the structured interview (INT):
<p>K1 General Business (INT)</p> <ul style="list-style-type: none"> Aware of elements of commercial law that may have an impact when working in accountancy, such as contracts, data protection or Anti Money Laundering Can explain the importance of upholding relevant codes of conduct Can explain different legal entities and organisational structures. Aware of the impact of technology on business and its accounting and finance functions. 	<p>Awareness of elements of commercial law relevant to accountancy and understands relevant codes of conduct. Understands different legal entities and their organisational structure. Awareness of the impact technology has on accounting and finance functions</p>	<p>Apprentice has not met the pass criteria</p>	<p>Is able to describe the key regulations relevant to the accounting functions within your organisation including the General Data Protection Regulation (GDPR) and anti-money laundering.</p> <p>Is able to explain the code of professional ethics and how this relates to their role.</p> <p>Is able to explain, the core values of the organisation and the impact they have on their role.</p> <p>Is able to identify the key differences between sole trader, partnership and Limited Liability entities.</p> <p>Is able to demonstrate the differences between public sector, private sector and voluntary sector.</p> <p>Is able to explain the importance and</p>	<p>They can provide one or two examples of how key regulations such as GDPR have an impact on their organisation.</p> <p>They explain how they have reacted and adapted to technological accounting and finance changes / challenges</p>

			impact of evolving technology in the current bookkeeping world, including the identification of tasks that are likely to be automated in the future.	
<p>K2 Understanding Your Organisation (INT)</p> <ul style="list-style-type: none"> • Understand own role within the context of your organisation • Understand transactional processes of accounting and their use within a finance function • Understand what makes a business or organisation successful, through either buying or selling products or supplying services to a market. 	<p>Understands their role, transactional processes and products or supply services that make the organisation successful.</p>	<p>Apprentice has not met the pass criteria</p>	<p>Is able to explain their role and responsibilities and how they impact on others in the organisation.</p> <p>Is able to demonstrate an understanding of the processes of recording financial transactions including the processes for dealing with sales and purchase transactions; and the processes involved with cash/bank and petty cash.</p> <p>Identify assets and liabilities, capital income and capital expenditure and, revenue income and revenue expenditure within the organisation.</p> <p>Is able to identify and outline the organisation's products and/or services.</p> <p>Using an example is able to explain how these products and/or services contribute to making their organisation successful.</p>	<p>Demonstrate how their organisation differs to other similar organisations, for example can articulate how their organisation's offerings can or do add value for their customers.</p> <p>Demonstrate how the finance function contributes towards success of the company for example, can describe at least one occasion when the intervention of the finance function improved performance of the business.</p>

<p>K3 Accounting Systems & Processes (WA)</p> <ul style="list-style-type: none"> • Understand how accounting systems and processes allows a business to keep track of all types of financial transactions • Know a range of routine accounts reports, reports and their use within the finance function • Understand the basics of internal control within own organisation. 	<p>Understands the relevance of accounting systems and processes within own organisation</p>	<p>Apprentice has not met the pass criteria</p>	<p>Using examples explain the accounting systems and processes within your organisation including the process of sales invoices, purchase invoices and credit notes; allocate payments to supplier accounts; allocate receipts to customer accounts; and record petty cash receipts and payments.</p> <p>Is able to outline the range of routine accounting reports produced within the organisation such as routine reports for internal purposes and routine reports for external purposes, and who they should be provided to.</p> <p>Demonstrate an understanding of the purpose and use of accounting reports and why they are produced.</p> <p>Demonstrate an understanding of the purpose and process of internal controls within the accounting function of the organisation and why they are in place.</p>	

<p>K4 Basic Accounting (WA)</p> <ul style="list-style-type: none"> • Aware of basic accountancy concepts and double entry bookkeeping • Understands bookkeeping controls • Understand the cost recording system within an organisation • Develop an understanding of the differences between Financial and Management Accounting. 	<p>Understands basic accountancy concepts, double entry bookkeeping and payroll. Understands the differences between financial and management accounting.</p>	<p>Apprentice has not met the pass criteria</p>	<p>Using examples explains the basic principles involved in double entry bookkeeping such as separate entity and duality concept.</p> <p>Demonstrates an understanding of the specific requirements of the accounting systems within the organisation and how these requirements can differ between systems.</p> <p>Is able to identify the purpose of controls accounts in the organisation such as sales ledger control accounts; purchase ledger control accounts and VAT control accounts.</p> <p>Using examples is able to outline the purpose of bank, purchase and sales reconciliations from within their finance department.</p> <p>Demonstrates an understanding of the cost recording system within their organisation including how costs are classified; how costs behave; how the organisation accounts for inventory; and how the costs are coded (if relevant).</p> <p>Using examples is able to identify the different purpose of financial and management accounting and the users of this information within the</p>	
---	---	---	---	--

			<p>organisation.</p> <p>Is able to explain all of the elements of payroll such as gross pay, Income Tax, National Insurance Contributions, Work Place Pensions and Statutory Deductions.</p>	
<p>K5 Ethical standards (INT)</p> <ul style="list-style-type: none"> • Understands corporate social responsibility (CSR), ethics and sustainability within organisations • Understands the importance of the need to keep up-to-date with relevant policies, procedures, regulatory or system changes. 	<p>Understand CSR, ethics and sustainability measures within their organisation</p>	<p>Apprentice has not met the pass criteria</p>	<p>Is able to explain how CSR and sustainability is relevant to their organisation.</p> <p>Using an example is able to demonstrate how they contribute to their organisation's ethical policies.</p> <p>Using an example is able to demonstrate how a finance professional will keep up to date with changing regulations, practices and developments.</p>	<p>They can demonstrate examples of how their work has contributed to their organisations CSR and sustainability objectives</p>

<p>S1 Attention to detail (WA)</p> <ul style="list-style-type: none"> • The ability to examine data to identify issues • The ability to reconcile data to minimise the chance of errors • The ability to plan and review work • Recognise and rectifies errors. 	<p>Is able to examine, reconcile and rectify errors in a timely and appropriate manner by implementing an effective review process</p>	<p>Apprentice has not met the pass criteria</p>	<p>Use at least 2 examples to show where they have identified issues in data and what actions they took to rectify them.</p> <p>Provides evidence of where they have checked and reconciled data to ensure accuracy and what actions they have taken to make appropriate changes to the data.</p> <p>Provides 2 examples of where they have reviewed their own work to determine if action is required, giving details of what relevant actions they have taken to correct any errors.</p>	
<p>S2 Communication (WA)</p> <ul style="list-style-type: none"> • Deals effectively with a range of stakeholders using appropriate communication methods to deliver accurate and timely results • Avoids jargon and uses the correct technical terms where appropriate • Demonstrates good listening and speaking skills to be able to communicate effectively in the right manner. 	<p>Demonstrates the ability to communicate effectively using the most appropriate methods for their given audience</p>	<p>Apprentice has not met the pass criteria</p>	<p>Provides evidence of where they have selected and prepared the appropriate method of communication, using vocabulary that is appropriate to the audience, with consideration to the following:</p> <ul style="list-style-type: none"> • The recipient; • Timescale; • Volume of information to communicate; • The need for a response/discussion/evidence of receipt. <p>Provides evidence of examples of where they have demonstrated the application of good listening skills in the workplace and how this has</p>	

			<p>improved their ability to perform their tasks.</p> <p>Is able to demonstrate effective speaking skills avoiding jargon and using the correct technical terminology providing clear explanations when an understanding by the audience is required.</p>	
<p>S3 Uses systems and processes (WA)</p> <ul style="list-style-type: none"> Utilises relevant office/accounting software packages to input and manage data accurately Ability to maintain the security of accounting information using passwords and other appropriate security measures. 	<p>Is able to apply the relevant software packages needed to accurately complete data management whilst following appropriate security measures in the maintenance of accounting information</p>	<p>Apprentice has not met the pass criteria</p>	<p>Is able to demonstrate accuracy in data input into office/accounting software used in their role.</p> <p>Provides evidence to demonstrate the use of security measures within their organisation.</p>	
<p>S4 Personal effectiveness (INT)</p> <ul style="list-style-type: none"> Ability to organise self, prioritise workload/activity to meet deadlines. Actively identifies team workload problems and offers to support peers where appropriate Ability to understand issues beyond own remit 	<p>Demonstrates an ability to understand issues beyond own remit and is clear on importance of organising and prioritising both personal and the team's workloads to meet deadlines, offering support when necessary</p>	<p>Apprentice has not met the pass criteria</p>	<p>Provides evidence of where they have set their own priorities in order to meet deadlines.</p> <p>Is able to demonstrate, with examples, a good approach/use of tools to effectively manage their workload.</p> <p>Is able to identify issues which can affect their team and gives example of where this has happened and the level of support that was offered to them.</p>	<p>They can demonstrate how they have re-evaluated tasks in light of conflicting and/or changing priorities</p>

			Using at least 2 examples to show where they have referred an issue to another member of their team and why it was appropriate to do this.	
<p>B1 Team work (INT)</p> <ul style="list-style-type: none"> • Supports colleagues and collaborates to achieve results • Builds working relationships within own team and other parts of the organisation • Be aware of their impact on others. 	Builds and maintains working relationships throughout the organisation through support and collaboration to achieve positive results. Is aware of their impact on colleagues	Apprentice has not met the pass criteria	<p>Provides evidence of where they have worked with others to achieve a shared goal.</p> <p>Using an example is able to demonstrate where they have worked with others in order to solve problems and accomplish team objectives and what the impact of this was on the team.</p> <p>Uses an example to demonstrate the interpersonal skills required to work effectively as part of a team and what impact their behaviour could have on their team.</p>	They can evidence when they have worked together with a group of people cohesively, towards a common goal, creating a positive working atmosphere, and supporting each other to combine individual strengths to enhance team performance.
<p>B2 Personal development (WA)</p> <ul style="list-style-type: none"> • Successfully implements changes that are required, as directed. • Displays an ongoing commitment to learning and self-improvement. • Seeks feedback and acts on it to improve their performance. 	Awareness of the need to seek and act on feedback showing a commitment to learning and self-improvement. Follows direction to successfully implement changes when required	Apprentice has not met the pass criteria	<p>Provides evidence of where they have carried out areas of improvement identified within the organisation's performance management process and what the results of this were.</p> <p>Provides evidence of their personal development plan which they have produced to support self-improvement through the use of different learning methods.</p>	

			Provides evidence of where they have sought constructive feedback from others and how they have responded positively to this in order to improve their performance within the team.	
<p>B3 Professionalism (INT)</p> <ul style="list-style-type: none"> Looks to behave professionally by adhering to the organisational code of conduct Has a 'right first time' approach. Shows integrity in their approach Demonstrates personal pride in the job through appropriate dress and positive and confident language. 	<p>Uses a right first-time approach, understands the importance of professional behaviour whilst adhering to their organisations code of conduct. Consistently behaves with both pride and integrity in their work and as is aware of the need for using both positive and clear language in all work-related communications.</p>	Apprentice has not met the pass criteria	<p>Is able to outline the organisations' code of conduct and how this affects their role on the organisation.</p> <p>Demonstrate how you would carry out an unfamiliar task to ensure the output is error free</p> <p>Maintains confidentiality of information</p> <p>Using examples is able to demonstrate the importance of appropriate language, personal appearance and body language in different situations.</p>	<p>They can articulate an understanding of why integrity is essential in the accounting and finance profession and has applied/considered the appropriate code of conduct within their role. For example, they have correctly identified any ethical issues raised and noted an appropriate course of action to address this (such as referral to appropriate senior colleague or process).</p>
<p>B4 Customer focus (INT)</p> <ul style="list-style-type: none"> Builds and maintains customer satisfaction with the products and services 	Builds and maintains customer satisfaction and delivers excellent service using the	Apprentice has not met the pass criteria	Using at least 2 examples, is able to show how they used a variety of actions to fully understand and meet a customer's needs and what the impact of this was.	Understands how to balance the needs of the customer against needs of the

<p>offered by the organisation in line with company policy, regulation and practice.</p> <ul style="list-style-type: none"> Delivers excellent service, identifying and meeting or exceeding customer expectations. 	<p>appropriate products and service offered by their organisation. Consistently works in line with their company policy regulation and practice</p>		<p>Provides evidence of when they seek feedback on personal effectiveness from a customer or customers, and what they use the feedback for.</p> <p>Is able to demonstrate how they respond to customers with an appropriate level of urgency.</p> <p>Provides evidence of when they have identified ways to improve the service offered to customers and what actions they took.</p>	<p>organisation for example: Can give an example of using clear communication to establish rapport.</p>
--	---	--	--	---