End-point assessment

Using the EPA Portal – customer guide

April 2020

Version 4.0

1.   Contents

2.   Introduction

This reference guide is to inform Customers how to:

- Access the EPA Portal; and
- Upload Gateway and Assessment evidence in preparation for end-point assessment.

If you experience any issues accessing the system, then please contact the EPA Team at epa@cityandguilds.com

Change history (v3.0, December 2019)

Section	Change
5 Uploading Assessment evidence into the EPA Portal	Section name change – 'Uploading Assessment evidence into the EPA Portal – via 'Course Tab' Additional instructions added from step W.
6 Uploading Assessment evidence into the EPA Portal – via 'Evidence Tab'	New section added.
7 How to check if the Gateway evidence has been accepted in the EPA Portal	Additional instructions added from step P.

3.   Using the EPA Portal for the first time

Step 1:

A. Initial access to the EPA Portal is only granted by the EPA Team, once the Walled Garden booking has been processed.

B. Via the EPA Portal, you will be sent a username and password. (Please check Junk folder in case it has been sent there).

C. Important: this activation email will expire after 48 hours.

    If the link is no longer valid, then please contact the EPA Team on epa@cityandguilds.com.

D. The recommended browser is **Google Chrome**.

E. An example of the login page.

Step 2:

F. When accessing the EPA Portal for the first time, you must read and accept the terms and conditions.

G. You need only accept these once.

Step 3:

H. Once accepted, a new window will launch prompting you to change your password.

I. You can now access the '**EPA Portal**'.

4.   Login/Logout

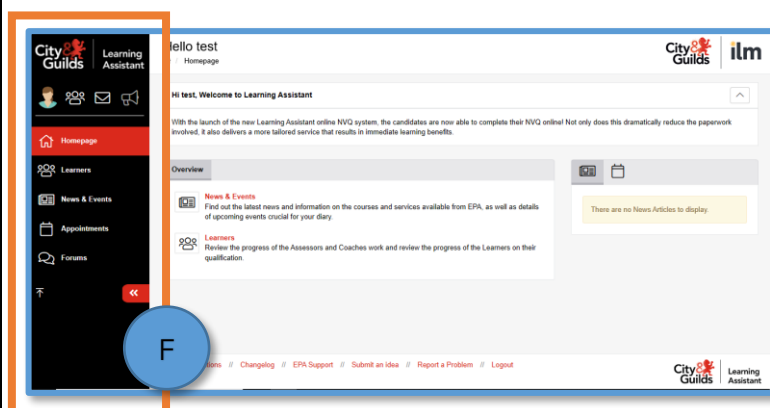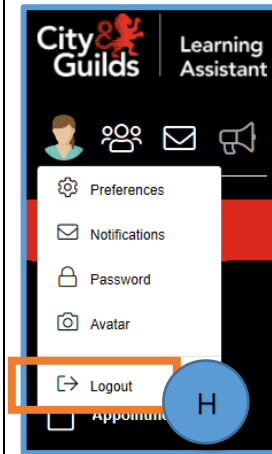| Step 1:	https://system.learningassistant.com/EPAPORT/ (A)
A. To launch the 'EPA Portal', paste the url link into your browser. B. The recommended browser is Google Chrome. C. Enter the username and password D. Click Login.	City & Guilds | ilm EPA Portal Username (C) Password Login (D) Reset Password Contact Administrator Customer Support
Step 2: E. The homepage will launch. F. Using the toolbar on the left-hand side, you can navigate around the system	(F)
Step 3: G. To log out, click on the Avatar at the top of the toolbar.	(G) Homepage
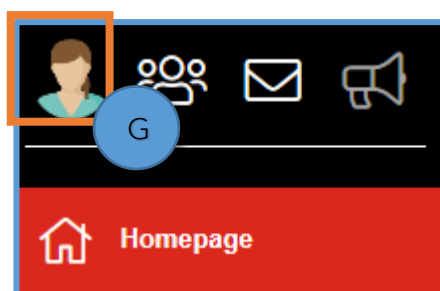
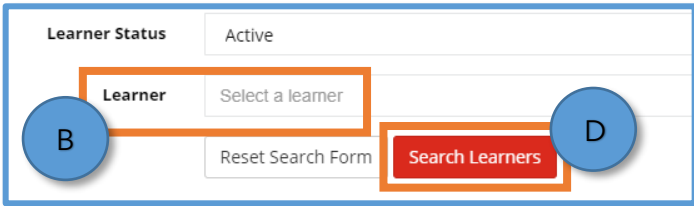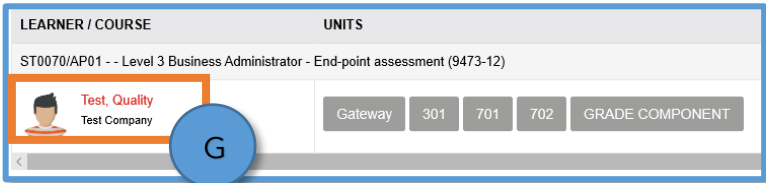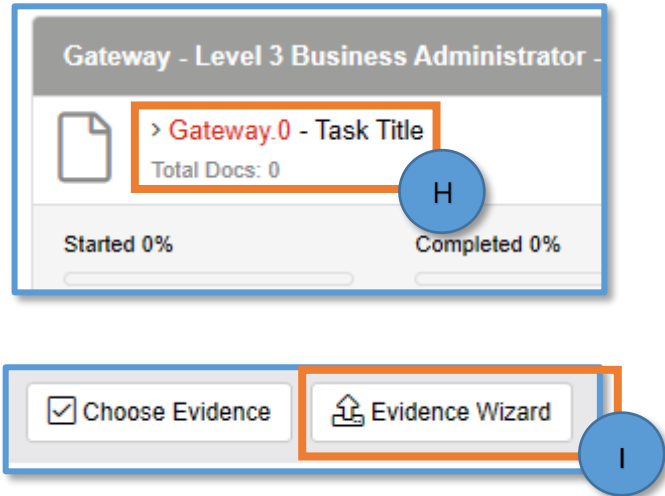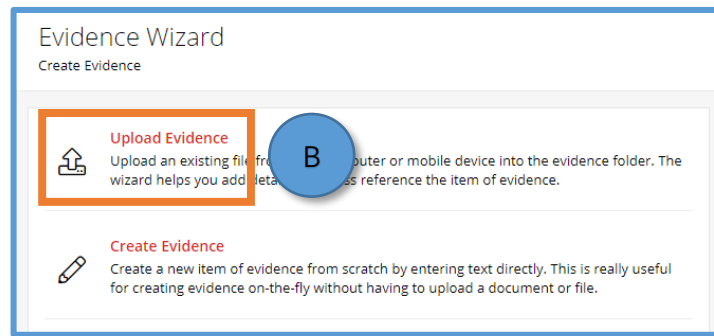|	
Step 4: H. Click 'Logout'	
Step 5: I. A new window will launch asking you to confirm that you want to log out. J. Click '**Close**' if you have changed your mind. K. Click '**Logout**' if you do wish to close the system.	

6
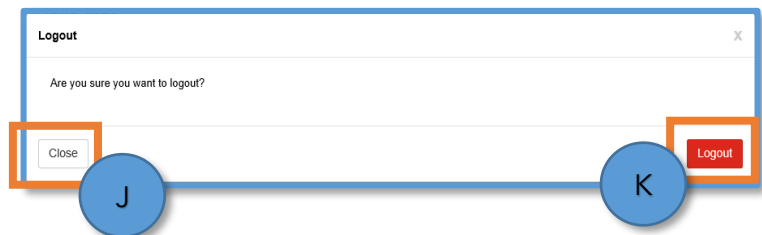
5. Uploading Gateway evidence to the EPA Portal – via 'Course' tab
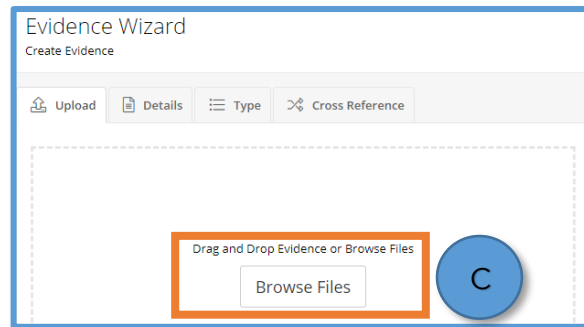
<table>
<tr><td colspan="2">

IMPORTANT

You should not attempt to upload Assessment evidence until the Gateway evidence has been reviewed and accepted by the EPA Team.
</td></tr>
<tr><td>

Step 1:

A. From the '**Homepage**' scroll and click on '**Learners**'.
</td><td>

</td></tr>
<tr><td>

B. To search for an apprentice, enter their name in the '**Learner**' field.
C. As you type, the system will start to list potential matches.
D. Alternatively, you can search by '**Course**', '**Company**' or just by clicking '**Search Learners**'.
E. If you click '**Search Learners**' only, the results will show a full list of the apprentice names.

Tip: Ensure that '**Learner Status**' is 'Active'.
</td><td>

</td></tr>
<tr><td>

F. When the apprentice has been found, the details will show below.
G. Click on their name (**in red**) and a new window will launch.
</td><td>

</td></tr>
<tr><td>

H. In the '**Course**' tab, click on **Gateway** (**in red**).
I. Look to the right and click on '**Evidence Wizard**'.
</td><td>

</td></tr>
</table>

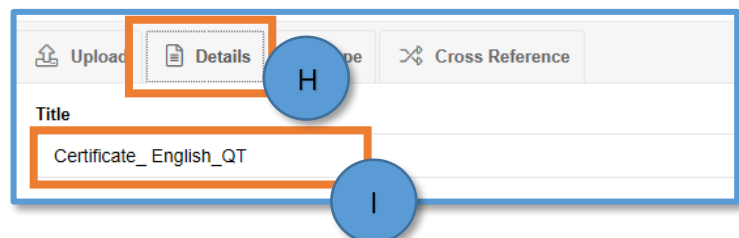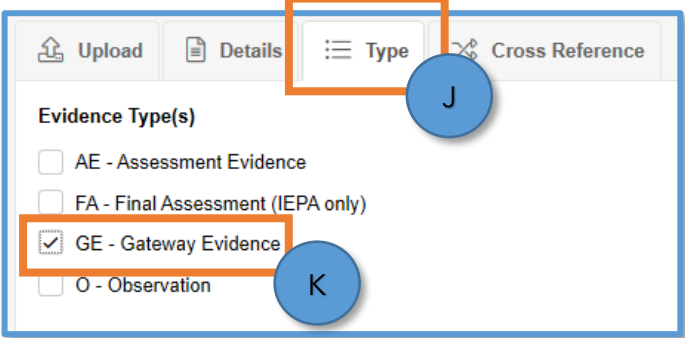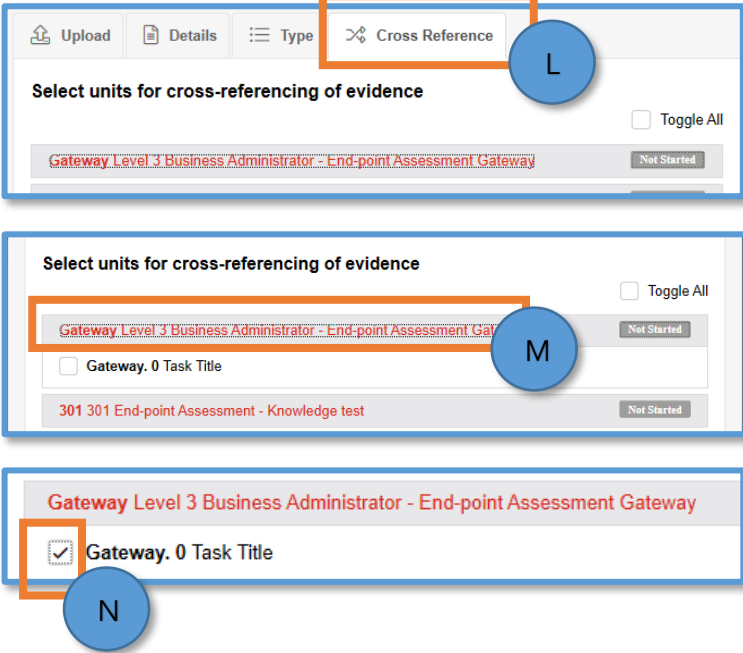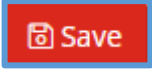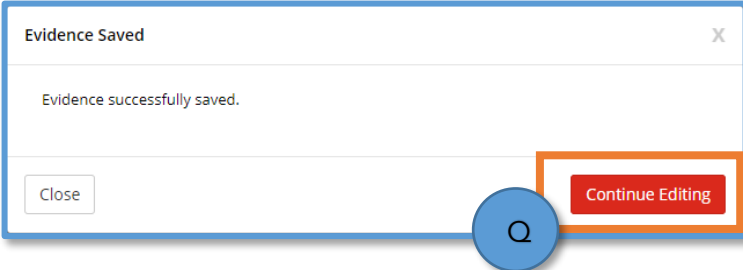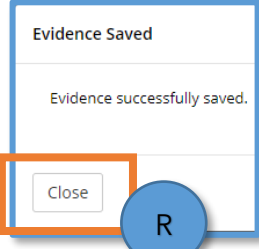|	
Step 2: A. Evidence Wizard will launch a new window. B. Click on '**Upload Evidence**'.	Evidence Wizard Create Evidence **Upload Evidence** Upload an existing file from ~~outer or mobile device into the evidence folder. The wizard helps you add deta~~ reference the item of evidence. **Create Evidence** Create a new item of evidence from scratch by entering text directly. This is really useful for creating evidence on-the-fly without having to upload a document or file.
C. Click on '**Browse File**'. Or drag and drop files in the area	Evidence Wizard Create Evidence ⬆ Upload 📄 Details ☰ Type ✕ Cross Reference Drag and Drop Evidence or Browse Files Browse Files
D. Select the file to be uploaded. E. Click on '**Open**'. *Note: <u>Only files up to 150MB can be uploaded</u>. The larger the file, the more time it will take to upload.*	Name / Date modified / Type / Size Certificate_ English_QT 17/12/2019 17:48 Microsoft Word D... 12 Certificate_English_QT 17/12/2019 17:48 PDF File 6 Certificate_ Maths_QT 17/12/2019 17:47 Microsoft Word D... 12 EPA booking guide_draft_v3_June'19 20/05/2019 14:31 Microsoft Word D... 1,914 File name: Certificate_English_QT All files Open
F. Under '**Uploaded Files**', you will see the file uploaded. G. If this is the wrong file, then click on the bin icon to delete.	**Uploaded Files** Certificate__English_QT.pdf (6 KB) 🗑
H. Click '**Details**' tab. I. In the 'Title' field, name the file so that it is clear to the EPA Team what it is.	⬆ Upload 📄 Details ✕ Cross Reference **Title** Certificate_ English_QT

J. Click 'Type' tab. K. Tick 'GE- Gateway Evidence'.	
L. Click 'Cross Reference' tab. M. Click on 'Gateway' to open. N. Tick 'Gateway'. Important To ensure that you can submit the Gateway evidence, always cross reference.	
O. If all is correct, then click 'Save'.	
P. After saving, you can replace the file if it is incorrect. Q. Click on 'Continue Editing'. (Go to step S)	
R. If all is correct, then click 'Close'.	

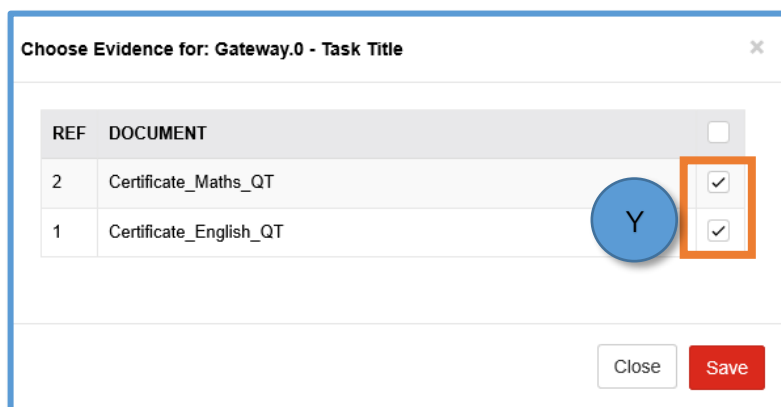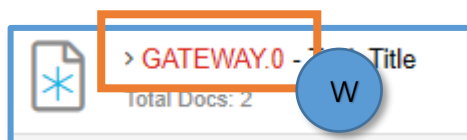|	
S. Click on 'Replace File'. T. Repeat steps C to O.	**File Name** Certificate__English_QT.pdf **File Size** 6 KB **Replace File** S
U. If all is correct, then click 'Close'. V. Repeat the process, until all the evidence has been uploaded.	**Evidence Saved** X Evidence successfully saved. Close U **Continue Editing**
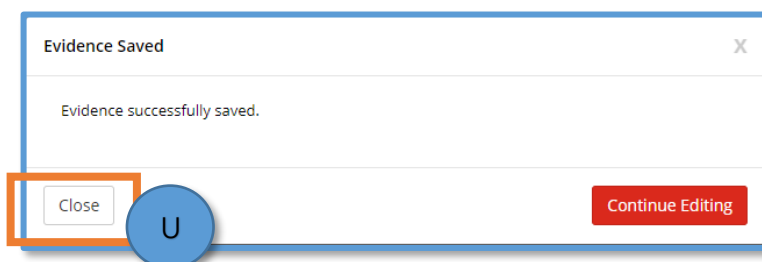
Note: If you've clicked on the 'Evidence' tab during this process, then you will need to go to step AC to submit the Gateway Evidence.

If you are still in the 'Course' tab, then continue to the next step.

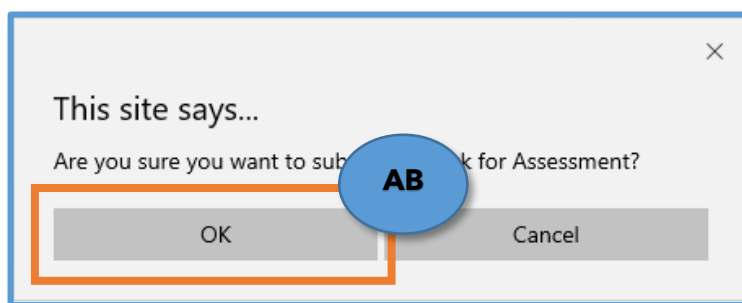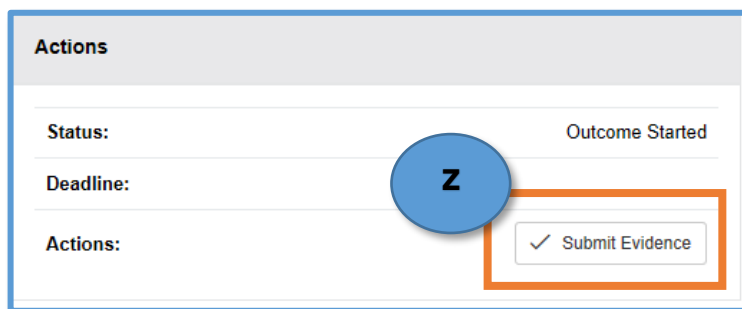|	
W. In the 'Course' tab, click on Gateway (in red). X. In the new view, go to the Related Evidence section. Y. By cross-referencing the Gateway Evidence (as per steps L-N), there is no longer a requirement to choose the Gateway evidence before it is submitted. The evidence will automatically be selected. See example of the 'Choose Evidence' window.	> GATEWAY.0 - Task Title W Total Docs: 2 **Choose Evidence for: Gateway.0 - Task Title** × | REF	DOCUMENT	☐
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2	Certificate_Maths_QT	☑
1	Certificate_English_QT	☑ Y	 Close **Save**

Z. Click 'Submit Evidence' in the Actions box on the right-hand side.

AA. A new window will open to reconfirm that you want to submit the Gateway Evidence.
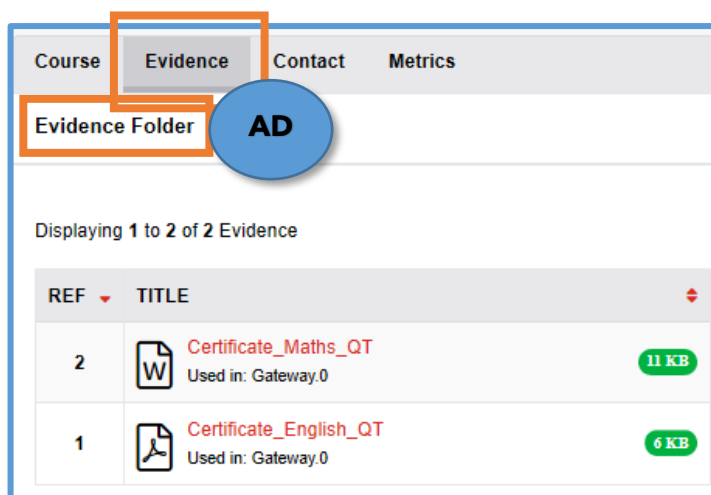
AB. If yes, then click 'OK'.

(Go to step AK)

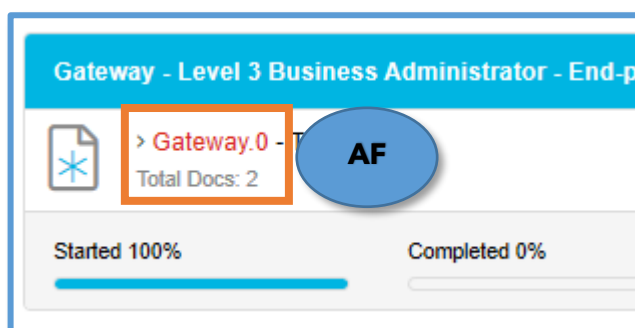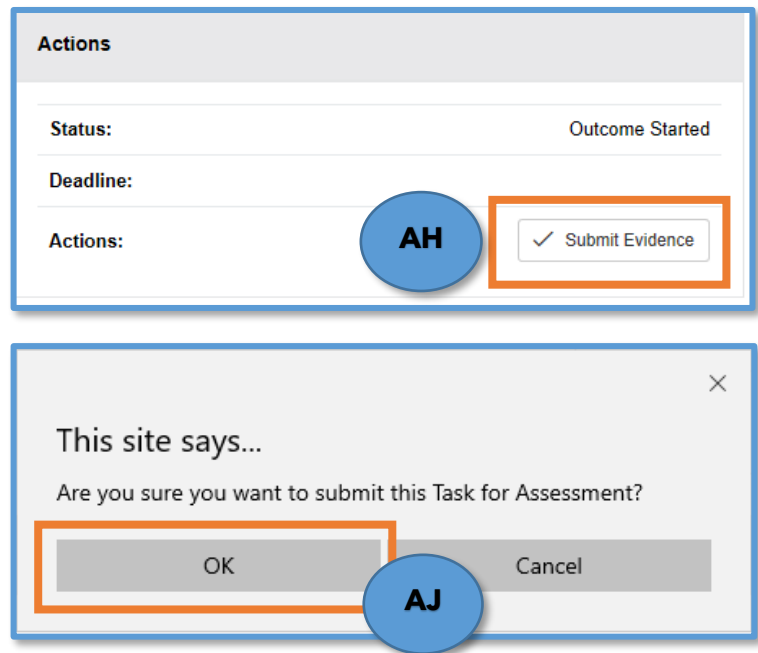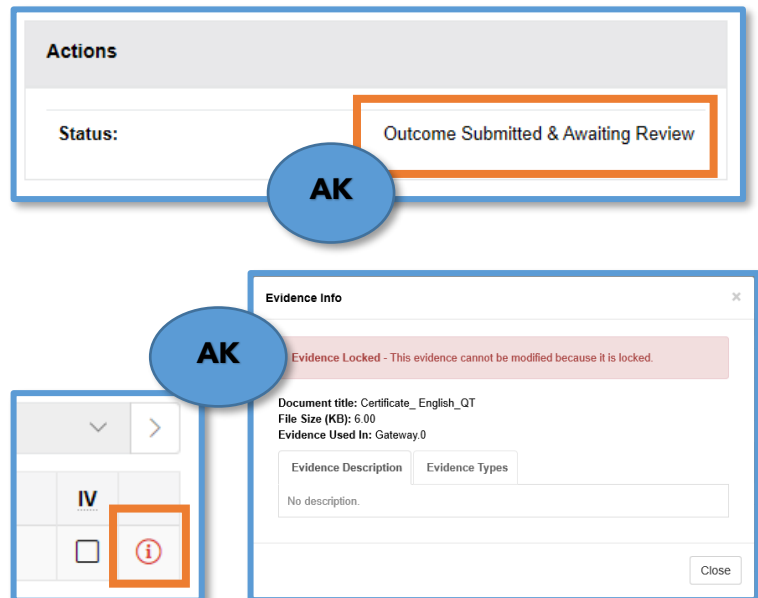*Important*: Only 'Submit Evidence' when all Gateway Evidence is uploaded.

*Always double check that everything is correct **before submitting the evidence**.*

Actions	
Status:	Outcome Started
Deadline:	
Actions:	✓ Submit Evidence

Z

This site says...

Are you sure you want to sub...k for Assessment?

OK   Cancel

AB

AC. If you've clicked on the 'Evidence' tab during this process, then you will need to return to the 'Course' tab to complete the process.

AD. Example of 'Evidence' tab.

Course	Evidence	Contact	Metrics

Evidence Folder   **AD**

Displaying **1** to **2** of **2** Evidence

REF ▾	TITLE	↕
2	W Certificate_Maths_QT Used in: Gateway.0	11 KB
1	Certificate_English_QT Used in: Gateway.0	6 KB

AE. Click on 'Course' tab.

AF. Under the Gateway section, click on 'Gateway.0' in red.

AG. In the new view, go to the Related Evidence section.

Gateway - Level 3 Business Administrator - End-p

> Gateway.0 - T   **AF**
Total Docs: 2

Started 100%   Completed 0%

AH. Click 'Submit Evidence' in the Actions box on the right-hand side.
AI. A new window will open to reconfirm that you want to submit the Gateway Evidence.
AJ. If yes, then click 'OK'.

(Go to step AK)

Important: Only 'Submit Evidence' when all Gateway Evidence is uploaded.

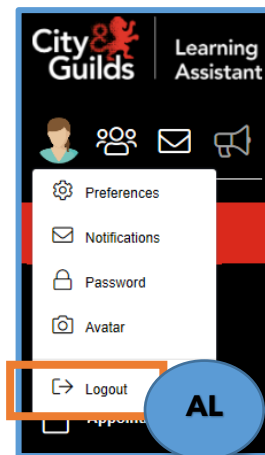*Always double check that everything is correct* **before submitting the evidence**.

Actions

Status:	Outcome Started
Deadline:	
Actions:	✓ Submit Evidence

This site says...

Are you sure you want to submit this Task for Assessment?

OK	Cancel

AK. Once the evidence has been submitted, the Gateway file is locked and <u>cannot be amended</u>.

Important: The Gateway file can only be amended when returned to the customer.

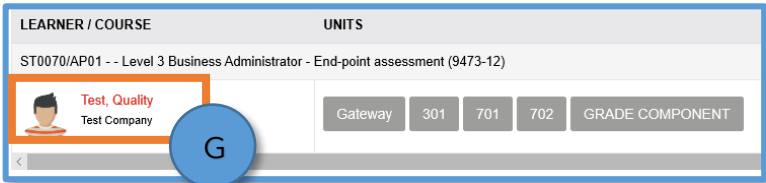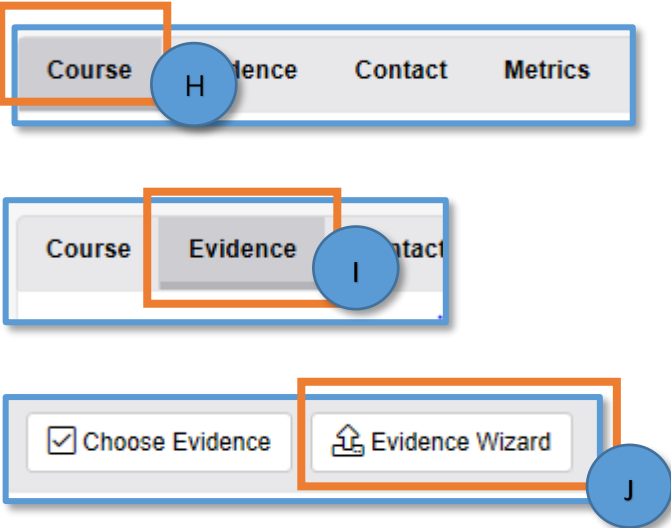*This will occur, if more action is required.*

Actions

Status:	Outcome Submitted & Awaiting Review

Evidence Info

Evidence Locked - This evidence cannot be modified because it is locked.

Document title: Certificate_ English_QT
File Size (KB): 6.00
Evidence Used In: Gateway.0

Evidence Description	Evidence Types

No description.

Close

IV

AL. Click 'Logout' when finished.

City & Guilds | Learning Assistant

- ⚙ Preferences
- ✉ Notifications
- 🔒 Password
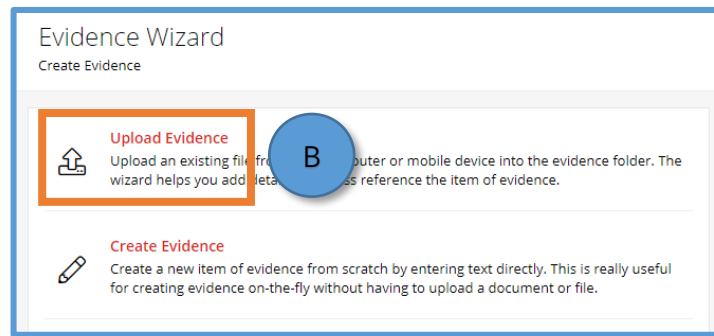- 📷 Avatar
- ↦ Logout

IMPORTANT

You should not attempt to upload Assessment evidence until the Gateway evidence
has been reviewed and accepted by the EPA Team.

6. Uploading Gateway evidence to the EPA Portal – via 'Evidence' tab
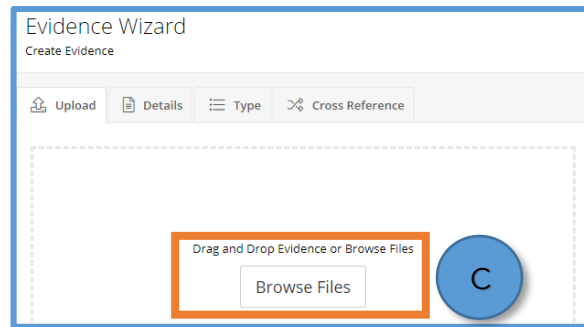
IMPORTANT You should not attempt to upload Assessment evidence until the Gateway evidence has been reviewed and accepted by the EPA Team.	
Step 1: A. From the '**Homepage**' scroll and click on '**Learners**'.	
B. To search for an apprentice, enter their name in the '**Learner**' field. C. As you type, the system will start to list potential matches. D. Alternatively, you can search by '**Course**', '**Company**' or just by clicking '**Search Learners'**. E. If you click '**Search Learners**' only, the results will show a full list of the apprentice names. **Tip**: Ensure that '**Learner Status**' is 'Active'.	
F. When the apprentice has been found, the details will show below. G. Click on their name (**in red**) and a new window will launch.	
H. The system automatically launches to the Course tab. I. Click on **Evidence** tab. J. Look to the right and click on '**Evidence Wizard**'.	

Step 2: A. Evidence Wizard will launch a new window. B. Click on '**Upload Evidence**'.	**Evidence Wizard** Create Evidence ⬆ **Upload Evidence** **B** Upload an existing file fro...uter or mobile device into the evidence folder. The wizard helps you add...deta...ss reference the item of evidence. ✏ **Create Evidence** Create a new item of evidence from scratch by entering text directly. This is really useful for creating evidence on-the-fly without having to upload a document or file.
C. Click on '**Browse File**'. Or drag and drop files in the area	**Evidence Wizard** Create Evidence ⬆ Upload 📄 Details ☰ Type ⤬ Cross Reference Drag and Drop Evidence or Browse Files Browse Files **C**
D. Select the file to be uploaded. E. Click on '**Open**'. *Note: <u>Only files up to 150MB can be uploaded</u>. The larger the file, the more time it will take to upload.*	Name / Date modified / Type / Size Certificate_English_QT / 17/12/2019 17:48 / Microsoft Word D... / 12 Certificate_English_QT / 17/12/2019 17:48 / PDF File / 6 Certificate_Maths_QT / 17/12/2019 17:47 / Microsoft Word D... / 12 EPA booking guide_draft_v3_June'19 / 20/05/2019 14:31 / Microsoft Word D... / 1,914 ile nam: Certificate_English_QT / All files / Open **E**
F. Under '**Uploaded Files**', you will see the file uploaded. G. If this is the wrong file, then click on the bin icon to delete.	**Uploaded Files** Certificate__English_QT.pdf (6 KB) **F** 🗑 **G**
H. Click '**Details**' tab. I. In the 'Title' field, name the file so that it is clear to the EPA Team what it is.	⬆ Uploa... 📄 Details ...pe ⤬ Cross Reference **H** **Title** Certificate_English_QT **I**

J. Click '**Type**' tab. K. Tick '**GE- Gateway Evidence**'.	
L. Click '**Cross Reference**' tab. M. Click on '**Gateway**' to open. N. Tick '**Gateway**'. <u>Important</u> To ensure that you can submit the Gateway evidence, always cross reference.	
O. If all is correct, then click '**Save**'.	
P. After saving, you can replace the file if it is incorrect. Q. Click on '**Continue Editing**'. (Go to **step S**)	
R. If all is correct, then click '**Close**'.	

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S. Click on 'Replace File'. T. Repeat steps C to O.	**File Name** Certificate__English_QT.pdf **File Size** 6 KB **Replace File** (S)
U. If all is correct, then click 'Close'. V. Repeat the process, until all the evidence has been uploaded.	**Evidence Saved** X Evidence successfully saved. Close (U) **Continue Editing**

W. In the 'Evidence' tab, you can see the uploaded file(s).
X. Once all Gateway Evidence has been uploaded, click on the 'Course' tab.
	Evidence Folder (W)
	
	Displaying **1** to **2** of **2** Evidence
	
	REF ▾ TITLE
	
	2 [W] Certificate_Maths_QT
	        Used in: Gateway.0
	
	1 [pdf] Certificate_English_QT
	        Used in: Gateway.0

Y. Under the Gateway section, click on 'Gateway.0' in red.
Z. In the new view, go to the Related Evidence section.
AA.By **cross-referencing** the Gateway Evidence (as per steps L-N), there is no longer a requirement to choose the Gateway evidence before it is submitted.

The evidence will automatically be selected. See example of the 'Choose Evidence' window.
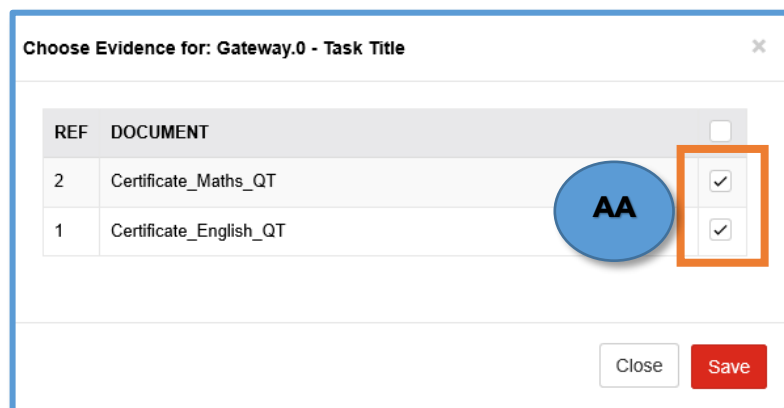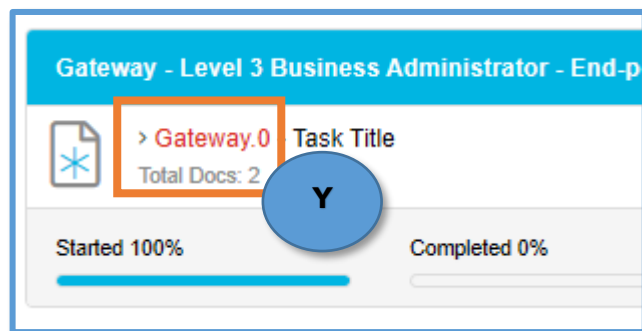
AB. Click '**Submit Evidence**' in the Actions box on the right-hand side.
AC. A new window will open to reconfirm that you want to submit the Gateway Evidence.
AD. If yes, then click '**OK**'.

Important: Only 'Submit Evidence' when all Gateway Evidence is uploaded.

*Always double check that everything is correct **before submitting the evidence**.*

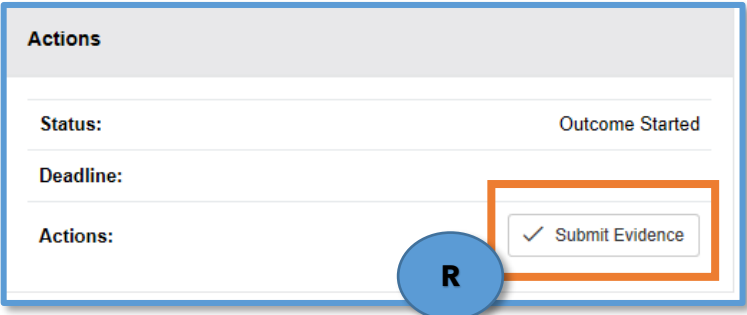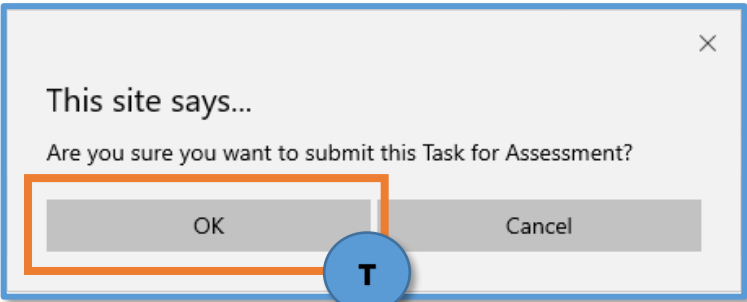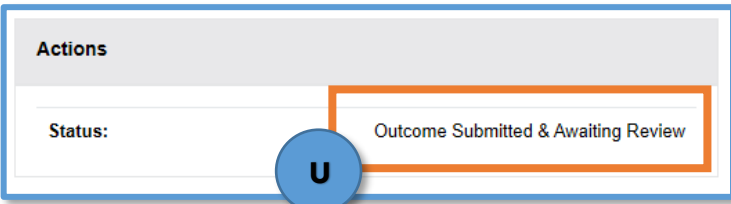|	
AE. Once the evidence has been submitted, the Gateway file is locked and <u>cannot be amended</u>. *Important: The Gateway file can only be amended when returned to the customer.* *This will occur, if more action is required.*	**Actions** Status: Outcome Submitted & Awaiting Review **AE** **Evidence Info** **AE** Evidence Locked - This evidence cannot be modified because it is locked. Document title: Certificate_ English_QT File Size (KB): 6.00 Evidence Used In: Gateway.0 Evidence Description Evidence Types No description. Close
AF. Click '**Logout**' when finished.	City & Guilds Learning Assistant Preferences Notifications Password Avatar Logout **AF**
IMPORTANT You should not attempt to upload Assessment evidence until the Gateway evidence has been reviewed and accepted by the EPA Team.	

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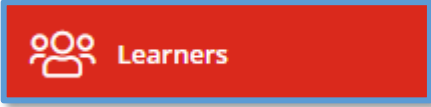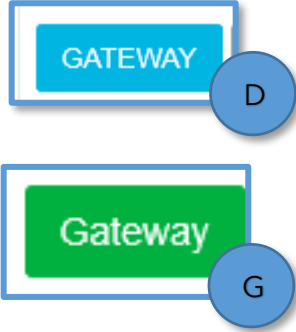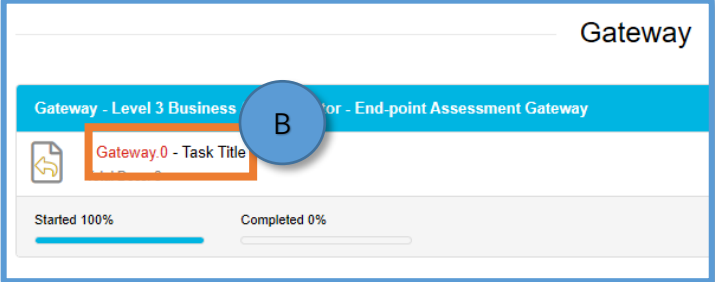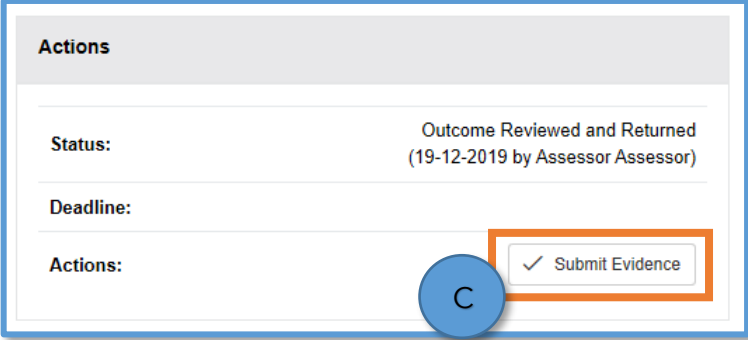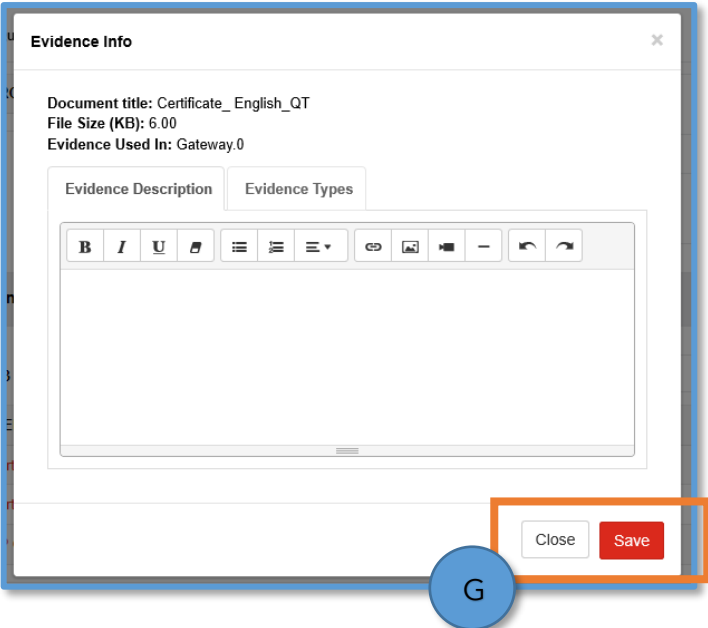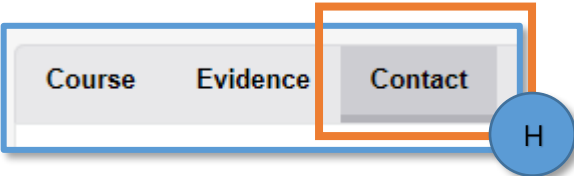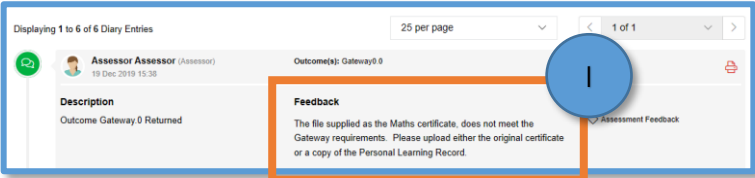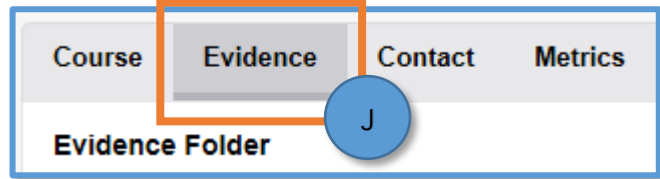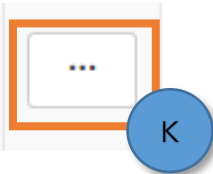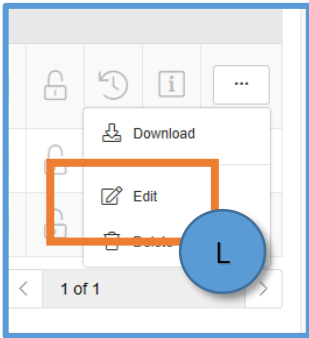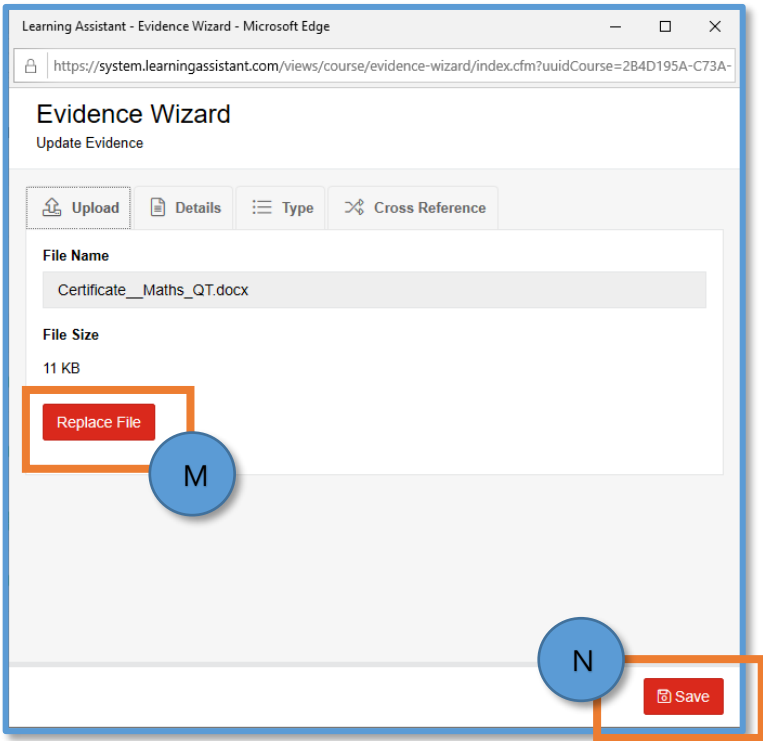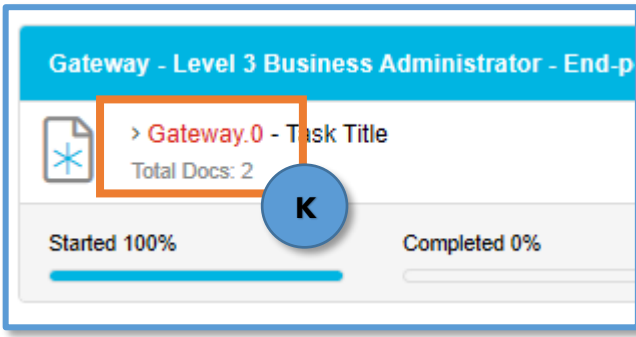
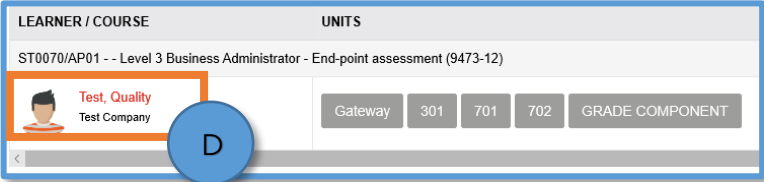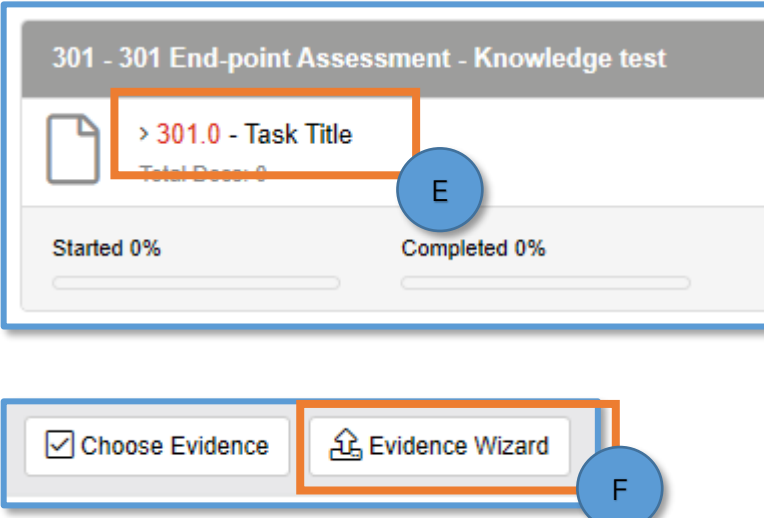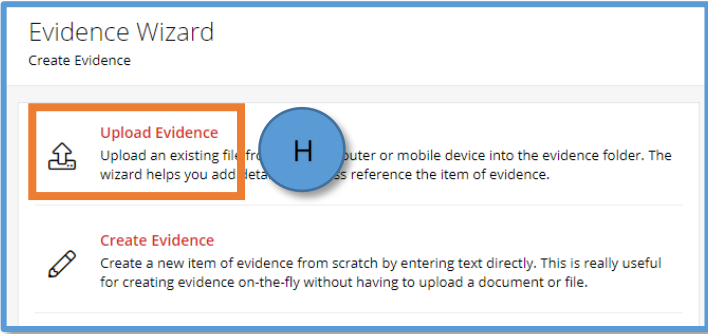## 7. How to check if the Gateway evidence has been accepted in the EPA Portal

Step 1: A. From the 'Homepage' scroll and click on 'Learners'.	Learners
B. Repeat: B-G (*Section 5 Uploading Gateway evidence to the EPA Portal*).	
C. When the apprentice has been found, the details will show below. D. If 'Gateway' is still blue, then further actions are required. E. You will be required to re-check the documents and where applicable, **replace** or **upload** the file(s). F. Go to **step 2: A**. G. If green, then no further action is required. **Go to step 5**.	GATEWAY D Gateway G
Step 2: A. Click on their name (**in red**) and a new window will launch. B. Click on **Gateway** (**in red**).	Gateway Gateway - Level 3 Business ... or - End-point Assessment Gateway Gateway.0 - Task Title B Started 100% Completed 0%
C. If the evidence has been returned, under 'Actions', the 'submit evidence' box is available.	**Actions** **Status:** Outcome Reviewed and Returned (19-12-2019 by Assessor Assessor) **Deadline:** **Actions:** ✓ Submit Evidence C

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D. Against each file, click on the icon.	
E. In the launched window, the file is now unlocked. F. You can only add a description or amend the evidence types here. G. Either close or click 'Save'.	
H. Click on 'Contact' tab.	
I. A diary entry from the EPA Team under 'Feedback', will advise what action(s) are to be completed.	
Step 4: J. To amend a file, click on the 'Evidence' tab.	

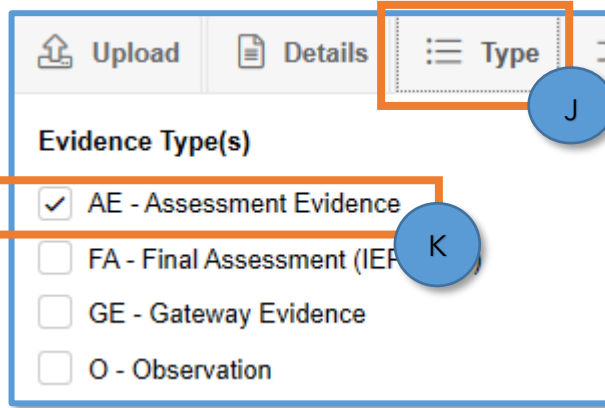|	
K. To the left, click the three dots.	
L. In the window, scroll and select 'Edit'.	
M. In the window, amend/replace the file. N. Once done, click 'Save'. O. Repeat where applicable. *Important* *Always ensure that the evidence is crossed referenced.*	
P. Once you are satisfied that all Gateway Evidence actions have been completed, click on 'Course' tab. Q. Under the Gateway section, click on 'Gateway.0'.	

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R. Click 'Submit Evidence' in the Actions box.	
S. A new window will open to reconfirm that you want to submit the Gateway Evidence. T. If yes, then click 'OK'. *Important: Only 'Submit Evidence' when all Gateway Evidence is uploaded.* *Always double check that everything is correct **before submitting the evidence**.*	
U. Once submitted, the status will change.	
V. Please revisit the apprentice's profile, to check when the Gateway evidence is reviewed and accepted by the EPA Team.	
Step 5: W. Where no actions are required, if you click on **Gateway** (in red), the evidence is now graded a 'Pass'. The banner will also be green and marked as 'COMPLETED'.	
X. Click 'Logout' when finished.	

IMPORTANT

Once the Gateway evidence has been accepted, you can continue to make amendments in the evidence folder until <u>two weeks</u> prior to the EPA.
After that date, your access to the apprentice will be removed.

8. Uploading Assessment evidence to the EPA Portal

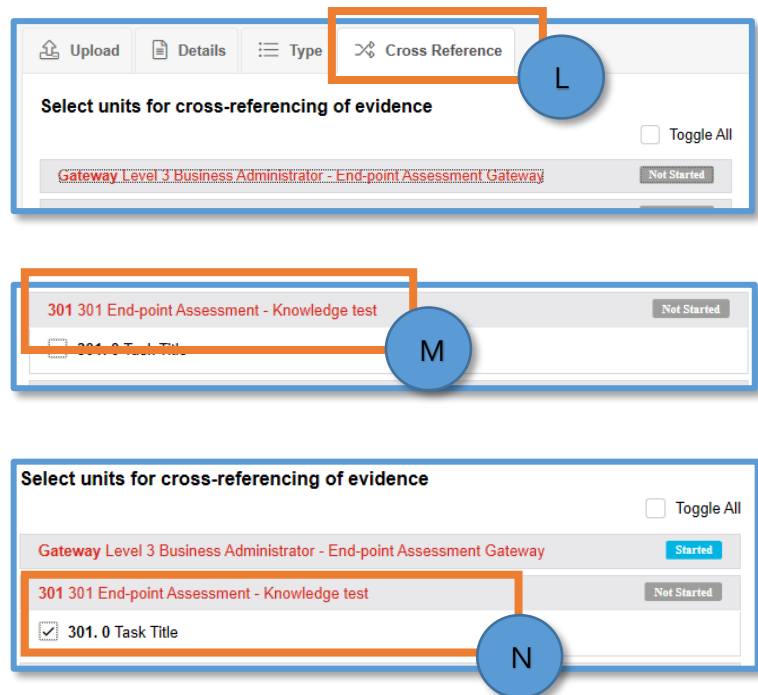| Step 1:	
A. From the 'Homepage' scroll and click on 'Learners'.	
B. Repeat step 1: B-G (*Section 5 Uploading Gateway evidence to the EPA Portal*).	
C. When the apprentice has been found, the details will show below. D. Click on their name (in red) and a new window will launch.	
E. In the 'Course' tab, click on Task (in red), under the relevant section e.g. Knowledge test. F. Look to the right and click on 'Evidence Wizard'.	
Step 2:	
G. Evidence Wizard will launch a new window. H. Click on 'Upload Evidence'.	
I. Repeat step 2: C-I (*Section 5 Uploading Gateway evidence to the EPA Portal*).	

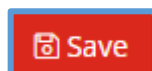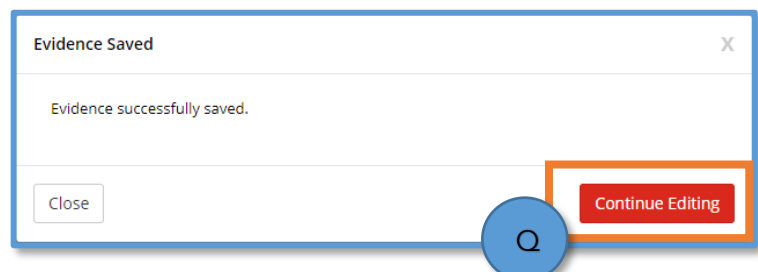|	
Step 2: J. Click '**Type**' tab. K. Tick '**AE- Assessment Evidence**'.	
L. Click '**Cross Reference**' tab. M. Click on '**Task title**' to open. N. Tick '**Component**'. Example shows unit 301 which is the Knowledge test.	
O. If it is correct, then click '**Save**'.	
P. After saving, you can replace the file if it is incorrect. Q. Click on '**Continue Editing**'. Go to **Step 2: S-T** (*Section 5 Uploading Gateway evidence to the EPA Portal*)	
R. Otherwise repeat Step 2: P-V (*Section 5 Uploading Gateway evidence to the EPA Portal*).	

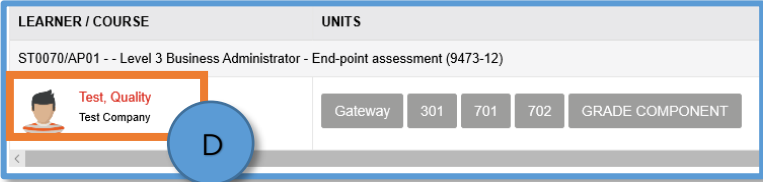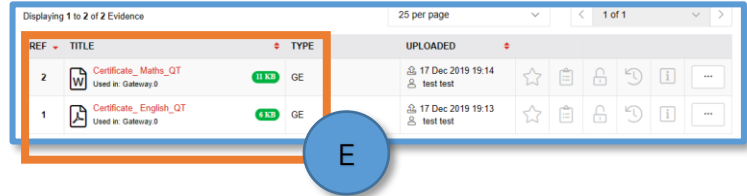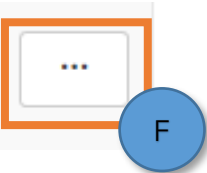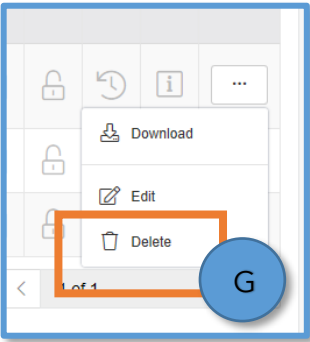|	
S. Click 'Logout' when finished.	
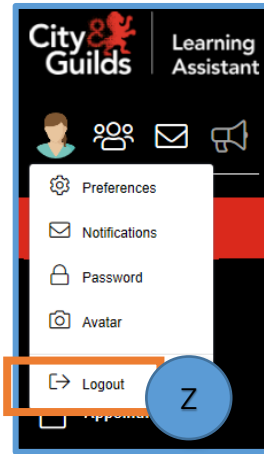
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<tr><td colspan="2">You can continue to make amendments in the evidence folder until <u>two weeks</u> prior to the EPA. After that date, your access to the apprentice will be removed.</td></tr>
</table>

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9. How to delete a file in the EPA Portal

Step 1: A. From the 'Homepage' scroll and click on 'Learners'.	
B. Repeat step 1: B-G (*Section 5 Uploading Gateway evidence to the EPA Portal*).	
C. When the apprentice has been found, the details will show below. D. Click on their name (in red) and a new window will launch.	
E. In the 'Evidence' tab, you can see all files uploaded	
Step 2: F. To the left, click the three dots.	
G. In the window, scroll and select 'Delete'.	
H. Click 'Logout' when finished.	
IMPORTANT You can continue to make amendments in the evidence folder until <u>two weeks</u> prior to the EPA. After that date, your access to the apprentice will be removed.	