Getting started on EPA Pro

Starting your EPA Journey
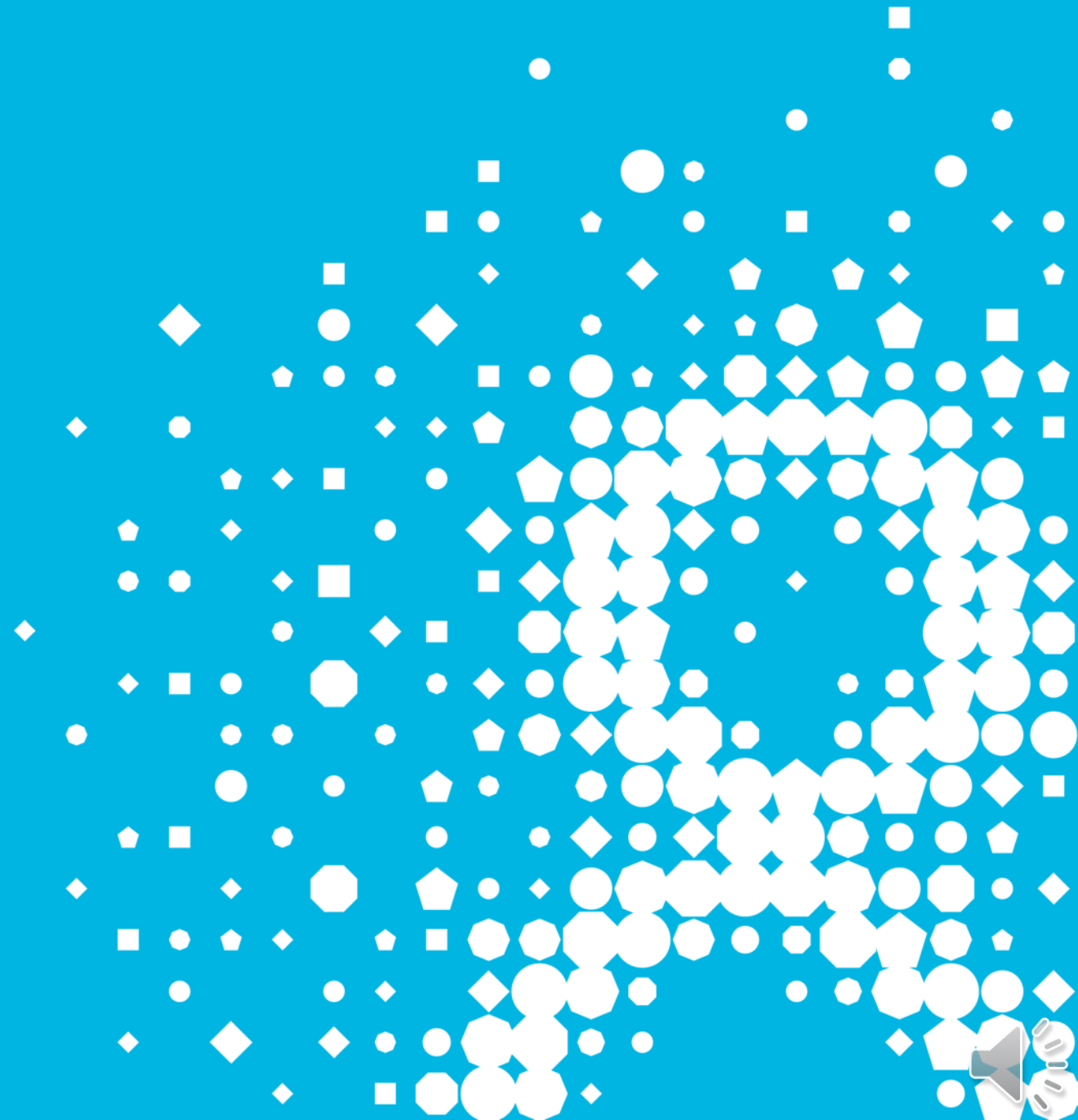
City&Guilds | ilm

A City & Guilds Group Collaboration
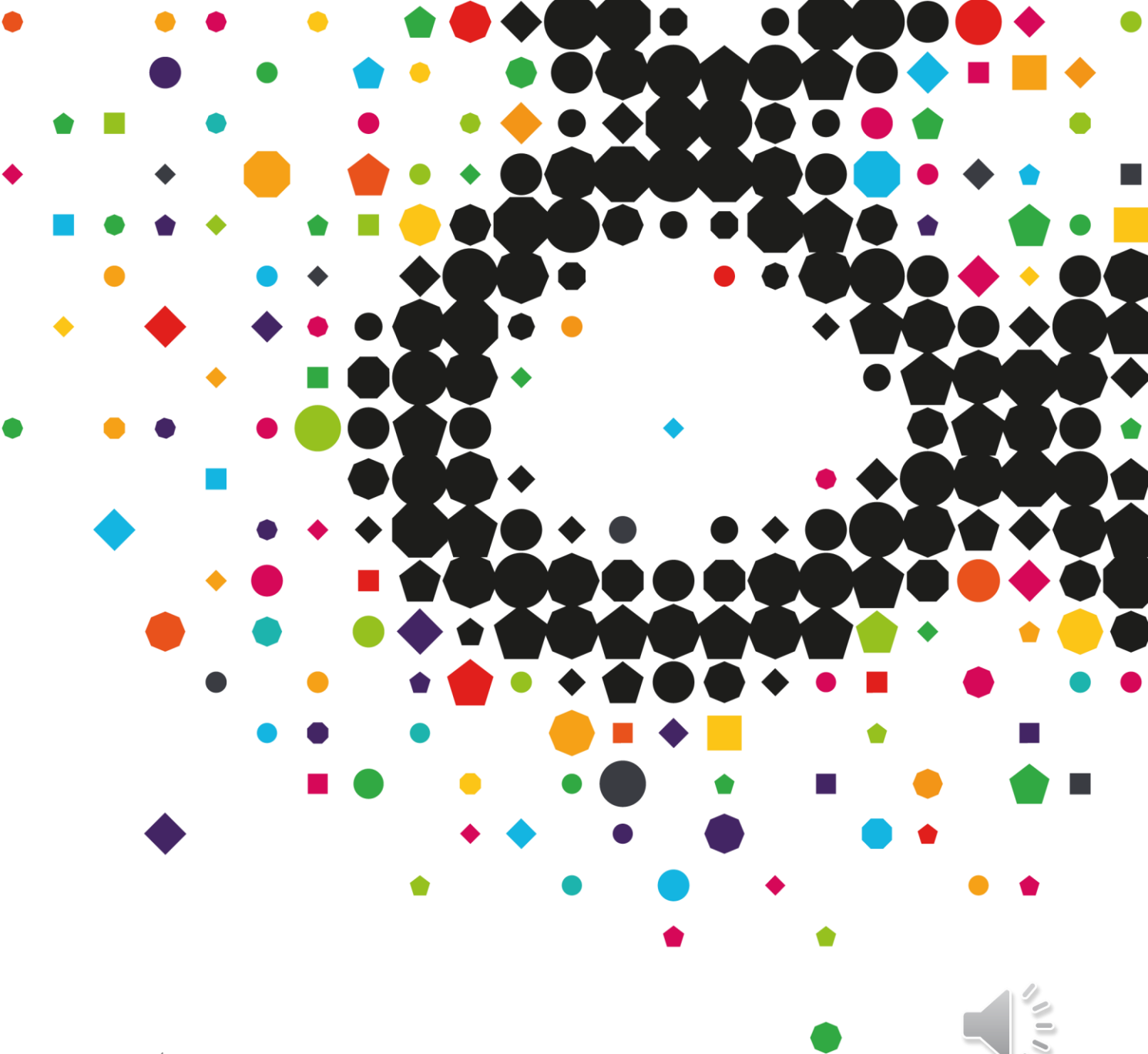
Contents

Welcome to EPA Pro

EPA Pro is our new EPA service delivery platform bringing the end-to-end EPA journey, from registration to results, all in one place.

Please familiarise yourself with our 8 Stage Journey for EPA

Stage 1
Choosing your EPAO

Stage 2
Getting set up with an EPA agreement

Stage 3
EPA registration

Stage 4
Gateway

Stage 5
EPA planning meeting

Stage 6
Upload assessment evidence

Stage 7
EPA event

Stage 8
EPA results and certification

We will focus on Stage 3 in this presentation

Access our detailed 8 Stage Journey here….

https://www.cityandguilds.com/apprenticeships/endpoint-assessment-service/epa-pro

City & Guilds | ilm
A City & Guilds Group Collaboration

epa.cityandguilds.com

- Once approved with us (or migrated as an existing customer) your agreed Primary Contact will receive an invitation to create a password for EPA Pro

Username is your email address
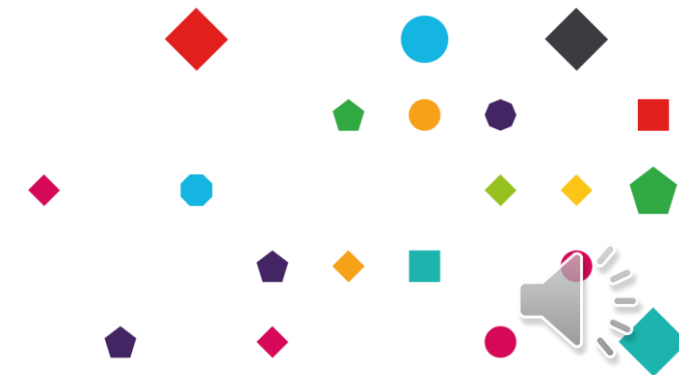*You can reset your password easily if you forget it!*

The Dashboard

When you log onto EPA Pro you will see this screen first, which gives you snapshot of your Apprentices journey:

- New Apprentices Enrolled

- Gateway Completed

- New Results

- New Certificates

Your calendar view will be populated with all the EPA activity for your Centre

The Menu

- On the left-hand side of the screen, you will see the main menu, this will allow you access to all the necessary actions on EPA Pro.

- We will go into more detail on some of these functions in this guide.

- We highly recommend you familiarise yourself with the menu and what is in each drop-down box as this will help you to navigate around the system.
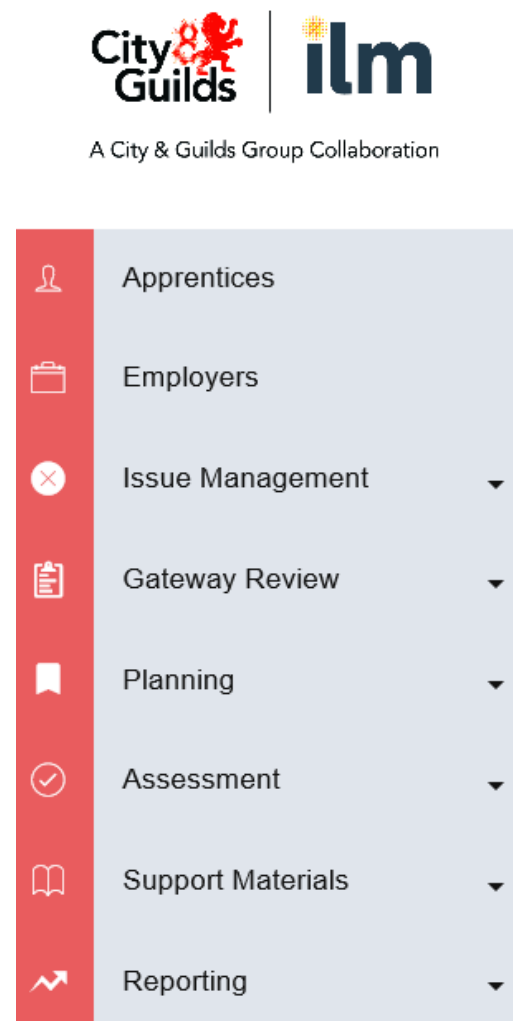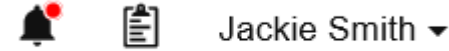
Notifications

Next to your Username in the top corner, you will see the Notifications bell:

This will inform you of all notifications regarding your apprentices, stages such as:
- Gateway due or completed
- Results available
- Assessments planned

Clicking onto a notification will take you to the record for that apprentice

Notifications can be removed from this list as you wish either by marking as read or deleting them

Notifications

Mark all as read   Delete all read

Certification completed for Karen Libby
1 hour ago
Mark as read   Delete

9494-703 Professional Discussion result available for Karen Libby
1 hour ago
Mark as read   Delete

9494-702 Presentation & Interview result available for Karen Libby
1 hour ago
Mark as read   Delete

9494-701 Practical Observation result available for Karen Libby
1 hour ago
Mark as read   Delete

David Smith's gateway has been approved.
4 hours ago
Mark as read   Delete

Karen Libby's gateway has been approved.
4 hours ago
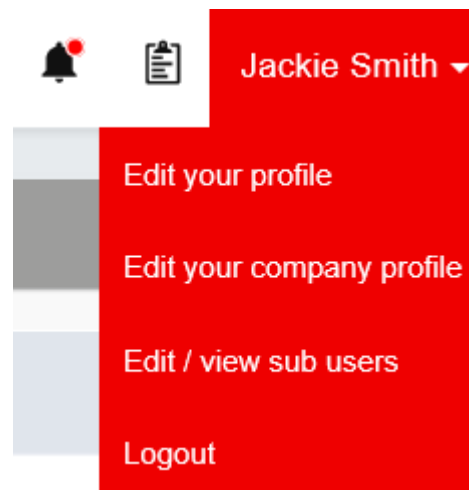Mark as read   Delete

Editing profiles

Editing / Adding Profiles

- Once approved for delivery for the first time or for existing customers once you are migrated to EPA Pro you will be set up with a Provider Primary user.

- In the top right-hand corner of the home screen, you will see your Username
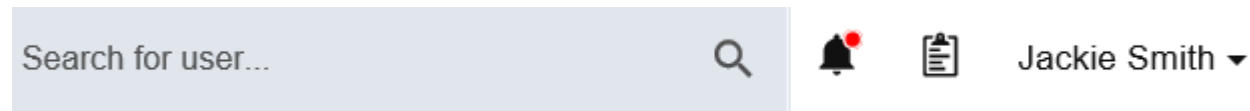
- From here you can do the following:

Editing Your Profile

- 'Edit Profile' provides a chance for you to check your details are correct

- The Security tab is for you change / update your password to the system

- We would also recommend you add your electronic signature here, as this will save time for you with the Gateway forms a little later!

Stage 3.
Registering your apprentices

Add your apprentices to start their EPA journey

City&
Guilds | ilm

A City & Guilds Group Collaboration

Registering your Apprentices

Apprentices can be added by selecting Apprentices from the main menu:

- One-by-one **⚇⁺Add Apprentice**

- Or in bulk **⚇⁺Import Apprentices**

Adding your Apprentices one by one

To add an individual apprentice, select Apprentices from the main menu on the Dashboard, then Add Apprentice.

⚲+ Add Apprentice

Add Apprentice

⚲ Manage Apprentices

| Apprenticeship Details | User | Apprentice Details | Workplace Details |

Apprenticeship Details

Provider *

Provider 1

Employer

Select employer

Standard *

Select standard

Specialism

Select standard first

Apprenticeship Dates

Expected Start Date *

DD/MM/YYYY

Expected Date Ready for EPA *

DD/MM/YYYY

Expected Completion Date

DD/MM/YYYY

On Programme Assessor

Assessor Name

Assessor Name

Assessor Phone Number

Assessor Phone Number

Work through the four tabs, ensuring all mandatory fields marked with an (*) are completed

To allow the apprentice access toggle Allowed login methods to green

Allowed login methods

Login using username/password

| Apprenticeship Details | User | Apprentice Details | Workplace Details |

Workplace Details

Company Name *

Company Name

Site Name

Site Name

Address Line 1 *

Address Line 1

Address Line 2

Address Line 2

Workplace Mentor

Mentor Name

Mentor Name

Job Title

Job Title

Telephone

Telephone

Email

Email

The Workplace Details is the address where the ESFA Certificates will be sent to

City & Guilds | ilm

A City & Guilds Group Collaboration

Bulk uploading your Apprentices

To bulk upload your apprentices, Select Apprentices in the main menu and then select Import Apprentices

⚕⁺ Import Apprentices

≋ Bulk Upload

| Apprentice | Employer |

Helpers ▾

Action Type:

Create Apprentice ⌄

Please Upload a .csv file:

| Choose | Choose a file... | Reset |

Upload

This will open the Bulk Upload section. From here select the required Action Type, Choose your file and upload

Helpers ▾

◄ Download Example Csv

◄ Documentation

Assessment Centre ID Finder

Employer ID Finder

Ethnicity Codes

External Standard ID Finder

Industry Sector ID Finder

Specialism ID Finder

Remember the Helpers!

For all bulk upload functions in EPA Pro, if you access the 'Helpers' drop down you'll be able to download an example .csv file giving you the format required and example content.

City & Guilds | ilm

A City & Guilds Group Collaboration

Hints and tips for adding Apprentices

Apprenticeship Details   User   Apprentice Details   Workplace Details

Workplace Details

Workplace Details is the address used to send ESFA Certificates

In the user details tab please use an email address for username

User Details

Username *

| Username |

Email *

| Email |

Reasonable Adjustments

| |

This is where you will let us know of any reasonable adjustments the apprentice requires such as additional time etc

Apprenticeship Dates

Expected Start Date *

| DD/MM/YYYY |

Expected Date Ready for EPA *

| DD/MM/YYYY |

Expected Completion Date

| DD/MM/YYYY |

There must be at least 366 days between the *'Expected start date'* and the *'Expected date ready for EPA'*

City & Guilds | ilm
A City & Guilds Group Collaboration

Allowed login methods

Login using username/password

Toggle green to give apprentices access to EPA Pro

Apprentice View – The Dashboard

Notifications/Actions

Personal profile

Preloaded support materials

Calendar of EPA events

Progress View

Apprentice View

Under Support Materials and then Welcome pack we have a short presentation 'Introduction of the Apprentice Journey in EPA Pro'.

Type	Title	Description	Updated	View
	Welcome pack	A useful document to share with colleagues and partners to introduce our end-point assessment service and the processes and platforms you will need to use. You will have received this Welcome pack when you were first approved for end-point assessment delivery.	18/12/2020 14:35	Open
	Introduction to the Apprentice Journey in EPA Pro	A short presentation showing the journey for an apprentice in EPA Pro; from accessing the platform and support resources, following their progress through EPA, to final EPA events, results and final certification.	27/08/2020 11:16	Open

This Presentation will give the Training Provider an understanding of the journey for an apprentice in EPA Pro; from accessing the platform and support resources, following their progress through EPA, to final EPA events, results and final certification.

Your City & Guilds
apprenticeship journey
supported by

epaPRO.

City & Guilds | ilm

A City & Guilds Group Collaboration
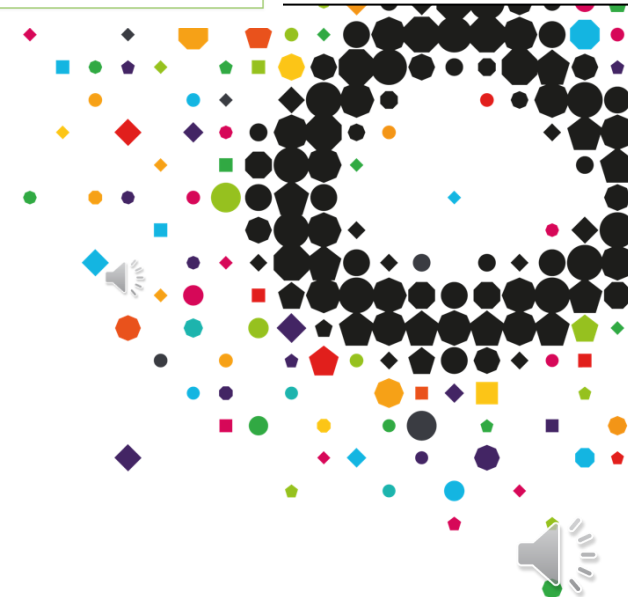
Adding your employers

It is not a mandatory requirement for Employers to have access to EPA Pro. It is at the discretion of the Training Provider.

ESFA Certificates will be sent to the address provided in Workplace Details under Apprentice.

Adding Employers

- In the same way as adding your apprentices you can add employers individually or as a bulk upload – Follow the steps for each process;

- one-by-one using [☐⁺ Add Employer]
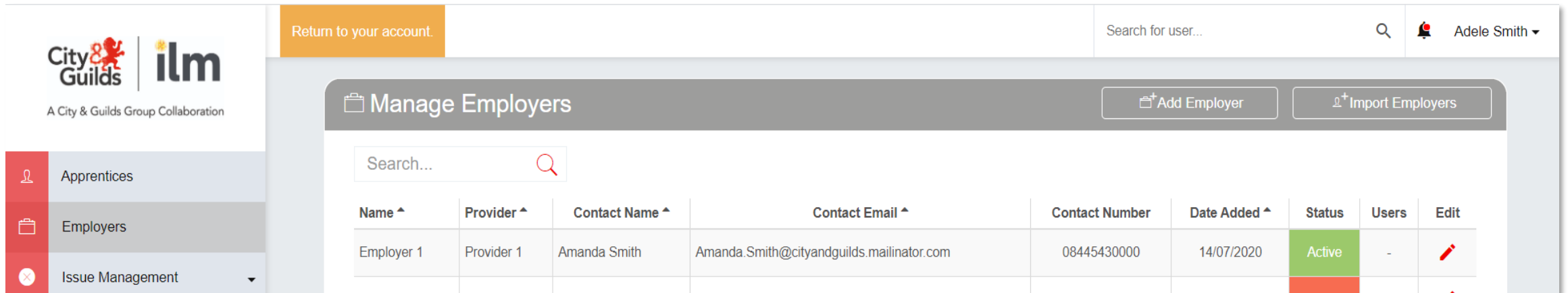
- Or in bulk using [⚲⁺ Import Employers]

- You can edit employers once they are set up by clicking on the pencil icon under Edit

Adding an Employer one by one

Select Employers from the main menu, then select Add Employer

Add Employer

Work your way through each tab, completing the mandatory fields
(assessment centres can be left blank)

Add Employer

Details Standards Assessment Centres Primary User Details Users
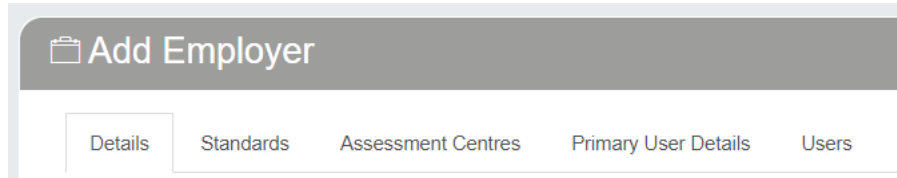
On the standards tab, you'll see any standards you're approved to deliver, select which ones relate to that employer

Add Employer   Manage Employers

Details Standards Assessment Centres Primary User Details Users

Standards

☐ 9308-22 Level 3 Team Leader/ Supervisor   ☐ 9494-12 Level 3 Customer Service Specialist
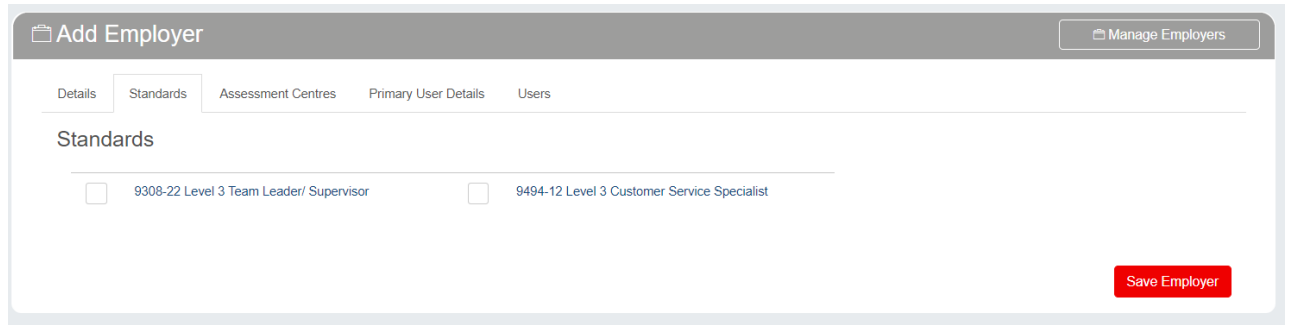
Save Employer

In the Primary User tab, toggle Allowed login methods to green if you want to give the Employer access to EPA Pro.

Add Employer   Manage Employers

Details Standards Assessment Centres Primary User Details Users

User Details

Username *   Given Name *
[Username]   [Given Name]

Email *   Family Name *
[Email]   [Family Name]

                        Telephone *
                        [Telephone]

Allowed login methods

⬤━ Login using username/password

Save Employer
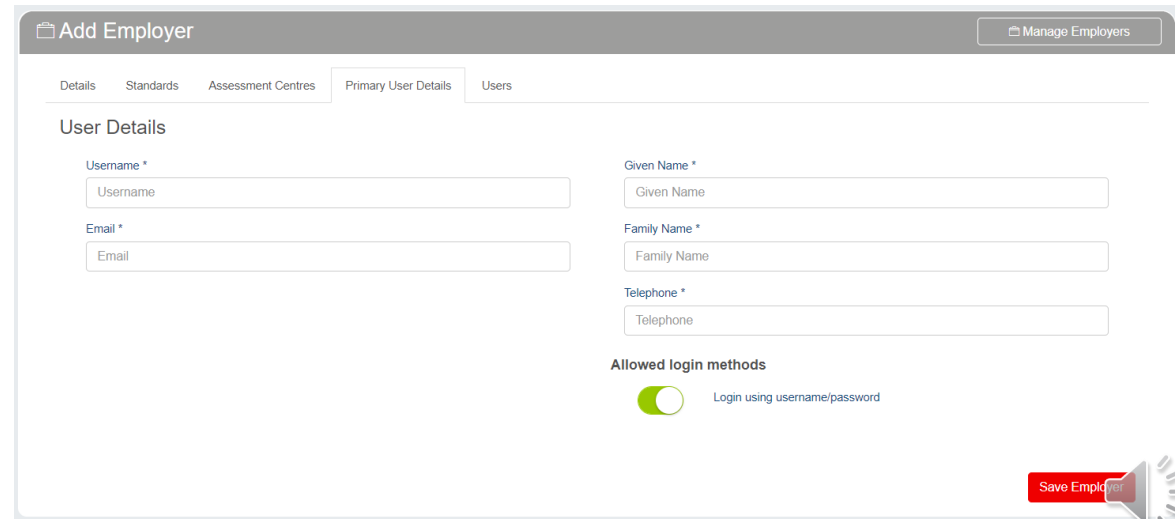
Bulk Import of Employers

Select Employers from the main menu, then select Import Employer
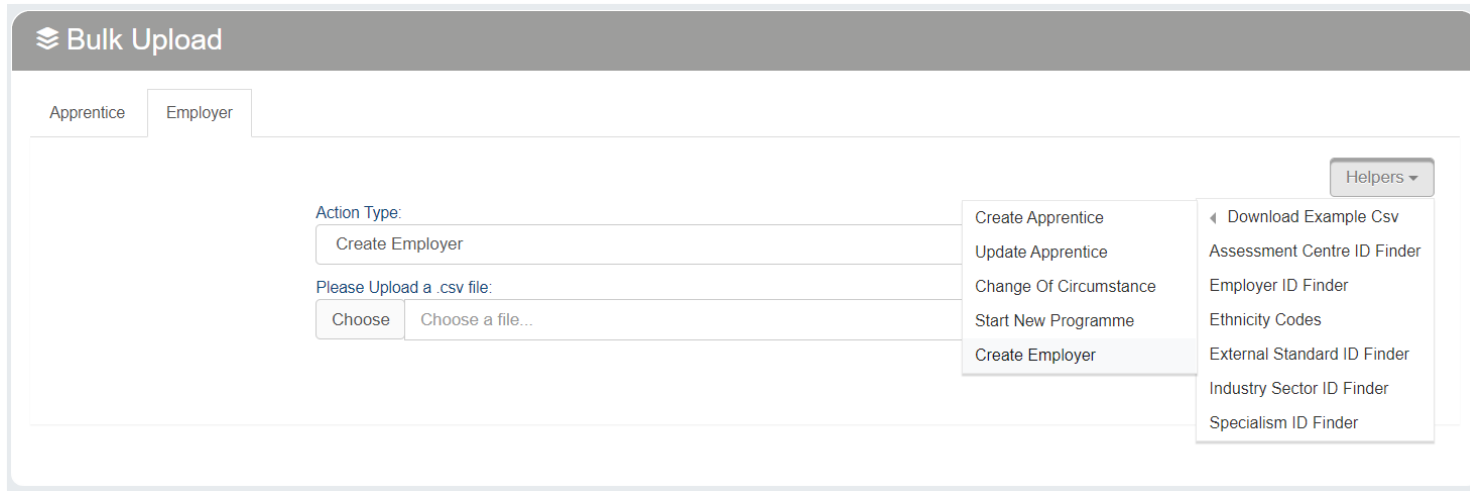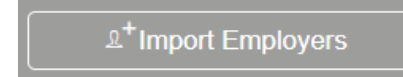
⊕ Import Employers

Bulk Upload

| Apprentice | Employer |

Helpers ▾

Action Type:

Create Employer

Please Upload a .csv file:

Choose | Choose a file...

Create Apprentice	◁ Download Example Csv
Update Apprentice	Assessment Centre ID Finder
Change Of Circumstance	Employer ID Finder
Start New Programme	Ethnicity Codes
Create Employer	External Standard ID Finder
	Industry Sector ID Finder
	Specialism ID Finder

This will open the Bulk Upload section. From here select the required Action Type, Choose your file and upload

ℹ️ *For all bulk upload functions in EPA Pro, if you access the 'Helpers' drop down you'll be able to download an example .csv file giving you the format required and example content.*

Once populated with your data simply upload the .csv file

Support resources

Support Resources

- Access Support Materials on the main menu
- Selection will provide a drop down of all available resources
- A wealth of support materials all accessed in one place
- Simply click here to open

Employers and Apprentices given access will only be able to view and access support resources applicable to them
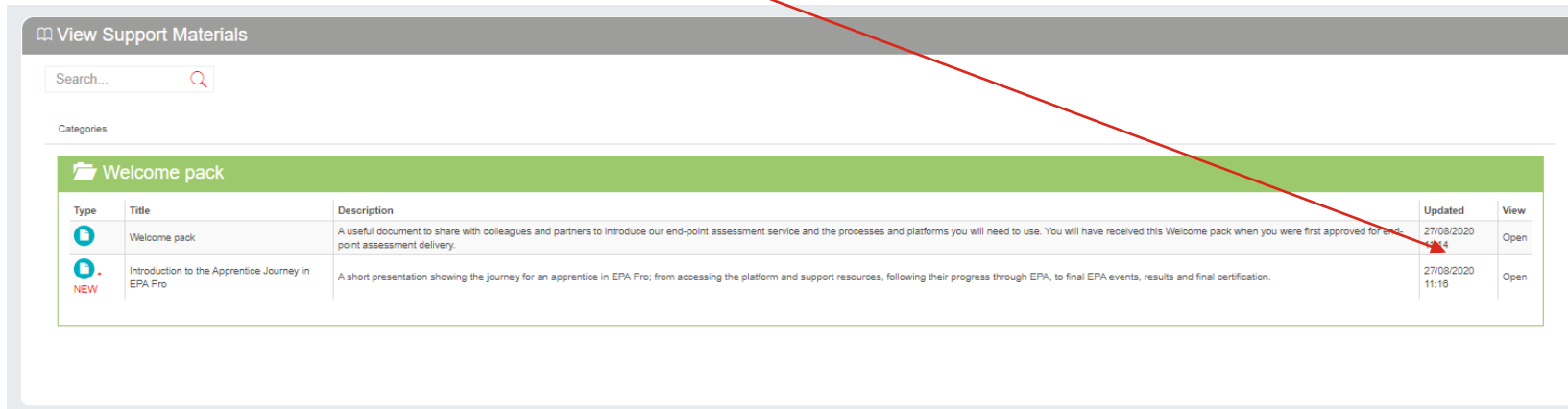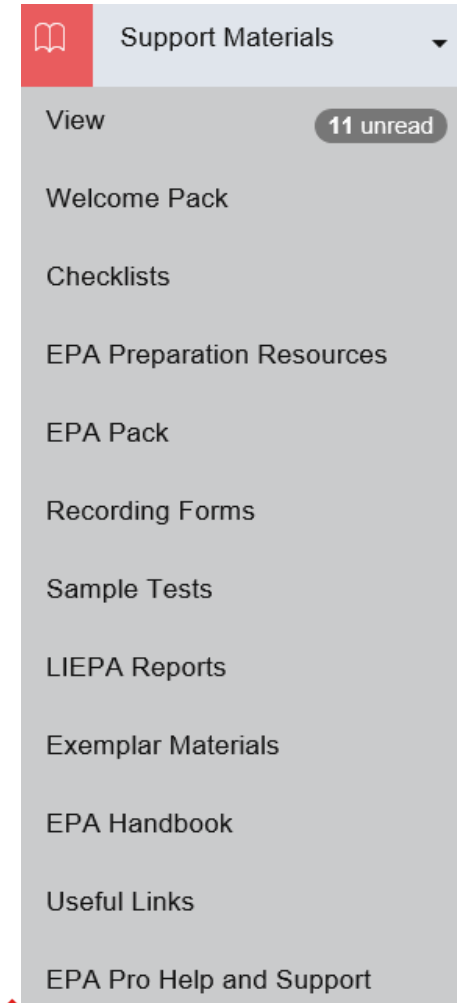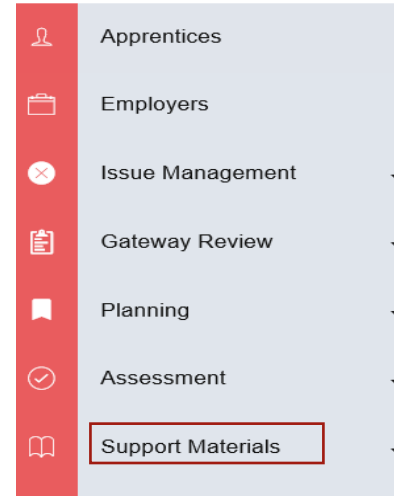
What support materials are available?

Support and Feedback

Contact us via:
centresupport@cityandguilds.com

08844 543 0000 (option 5)

Webchat on our contact us page
www.cityandguilds.com/help/contact-us

Feedback on our EPA Service Delivery

We'd love to hear your feedback and ideas on how we can improve our EPA Service Delivery, how can we make your life easier?

💬 Let us know ›

We'd love your feedback on how we can improve through our feedback link found either on

- https://www.cityandguilds.com/apprenticeships/endpoint-assessment-service

- or in the useful links section in EPA Pro

City & Guilds | digitalme | ilm
A City & Guilds Group Collaboration

Thank you

City&Guilds | ilm
A City & Guilds Group Collaboration