

City & Guilds Level 3 End-point Assessment for Mechatronic Maintenance Technician (9336-12)

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DRAFT EPA Pack for Providers and Employers

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For external use

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1. Apprenticeships



This pack will help providers and employers prepare apprentices for the End-point Assessment (EPA) of their City & Guilds Level 3 End-point Mechatronics Maintenance Technician (9336-12). It explains how apprentices will demonstrate the knowledge, skills and behaviours (KSBs) which they developed during their apprenticeship.

This pack must be used alongside the:

- Recording Forms for Providers and Employers
- [EPA Documents Library](#), which includes the Manual for the End-point Assessment Service, information about the EPA Service, policies about malpractice and appeals, FAQs, and a video about EPA which can be shared with apprentices.

The City & Guilds Manual for the End-point Assessment Service includes information on:

- application, registration and booking
- assessment
- results and post results (including resits)
- fees
- quality assurance.

A full-time mechatronics maintenance technician apprentice typically spends 42 months on-programme. The apprentice must spend at least 12 months on-programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules.

The employer should ensure that the apprentice has access to development opportunities to gain the KSBs, as outlined in the Standard, and must hold regular progress reviews with the provider and apprentice.

Once the apprentice has completed their training, they should be ready to go through 'Gateway' to EPA. See the [Gateway](#) and Assessment Instructions sections within this pack to understand what happens.

The EPA for this apprenticeship includes the following assessments which can be taken in any order, as requested by the apprentice:

- 9336-700 Observation with questions (facilitated by IEPA)
- 9336-701 Interview underpinned by a portfolio of evidence (facilitated by IEPA).

Preparing for EPA

In preparation for EPA, providers and employers should:

- read the Assessment instructions sections before reaching Gateway – the EPA Partnership Managers can help with any queries
- review which completed **Recording Forms and evidence** must be submitted, and when
- use the Recording Forms provided in the format laid out, unless indicated otherwise
- plan the venue and resources required for EPA – make sure the assessment environment is secure and comfortable, without interruptions
- use the Proficient portal to help manage the apprentice's progress through EPA
- for on-site assessment, arrange for a designated contact to be available on the day to ensure the correct resources are available.

To help apprentices prepare for EPA, providers and employers should:

- explain the assessments and **Recording Forms** to the apprentice – refer to details in the Assessment Instructions sections of this pack
- agree a realistic timeframe for submission of evidence that meets the EPA deadlines – any delays in submission of evidence will delay the assessments
- make sure the apprentice has the resources and time to prepare for, and undertake, EPA
- take the apprentice through some mock assessments
- share the EPA Preparation Guide with the apprentice, which includes information about system requirements for virtual meetings
- let City & Guilds know if access arrangements are required to support an apprentice through EPA. Information about City & Guilds access arrangements, including reasonable adjustments is on the City & Guilds website, under [EPA Documents Library](#).

Authenticating the apprentice's work

The Independent End-point Assessor (IEPA) must ensure all decisions satisfy Validity, Authenticity, Currency and Sufficiency (VACS). For evidence produced outside controlled conditions, the apprentice will be required to:

- sign a declaration that the work is their own
- reference all sources.

The employer/provider should also aid authentication by:

- supplementary (oral) questioning to gauge familiarity with the topic
- looking out for any changes to the apprentice's usual writing style, unusual sources/examples or the use of US spellings or phrases that might indicate cutting and pasting from the internet
- requiring access to evidence of steps in the process, for example drafts, notes, planning etc.

City & Guilds Position Statement on artificial intelligence

The following guidance on artificial intelligence (AI) is designed to help candidates, teachers and assessors to complete Non-Exam Assessments (NEAs), coursework and other internal assessments successfully. Please ensure familiarity with it.

Position Statement on AI | City & Guilds

Health & Safety and Codes of Practice

The importance of safe working practices, the demands of the Health and Safety at Work Act and any Codes of Practice associated with the industry **must** always be adhered to.

Following safe working practices is an integral part of all City & Guilds assessments, and it is the responsibility of the provider and employer to ensure that all the health and safety requirements are in place when apprentices are working on any projects or before apprentices begin any EPA.

Should an apprentice fail to follow correct health and safety practices and procedures during an EPA, the IEPA may advise the apprentice to stop and explain why.

Results submission and feedback

The IEPA will not provide feedback to the apprentice during or immediately following the assessment process. The provider will be informed by the City & Guilds EPA Team of the assessment results.

The IEPA will communicate the grade allocated for each assessment to the Lead Independent End-point Assessor (LIEPA) for quality assurance and sampling. The LIEPA will submit the results to the City & Guilds EPA Team.

Summary feedback will be provided to all apprentices after any grade determination has been carried out. The feedback will cover the areas against which insufficient evidence has been provided, leading to a 'Fail'. Our 'End-point Assessment Feedback' will also cover the areas against which the apprentice's evidence has resulted in the award of a Pass, or Distinction.

If the apprentice has passed EPA, the City & Guilds EPA Team will issue the EPA Statement of Achievement to the provider confirming the grade achieved and will notify Skills England who will issue the apprenticeship certificate.

Professional recognition

This apprenticeship aligns with:

- Institute of Engineering and Technology (IET) for Engineering Technician
- Institution of Mechanical Engineers (IMechE) for Engineering Technician.

Statement of Achievement

A printed EPA Statement of Achievement will be issued to each successful apprentice.

Providers and employers with access can view and download PDF copies of the Statement 24 hours after the results are published. A PDF supports more efficient processing of funding claims by providing evidence of apprentice certification before the apprentice's paper certificate arrives.

The overall apprenticeship certificate will be issued by the Skills England.

Digital credentials

A digital credential is a verified, visual representation of knowledge and skills earned in various learning environments. Please see an example below:

TBC

Digital credentials are issued and verified online, making it easy for individuals to demonstrate their competencies to employers, clients and peers online. Each digital credential has a unique URL that can be shared electronically via social media, in an email signature and on a CV. This is a complimentary service in addition to the paper certificate.

For further information, please visit the City & Guilds EPA Digital Credentials webpage and the general terms in respect of our privacy policy or contact digitalsupport@cityandguilds.com.

2. The apprenticeship Standard

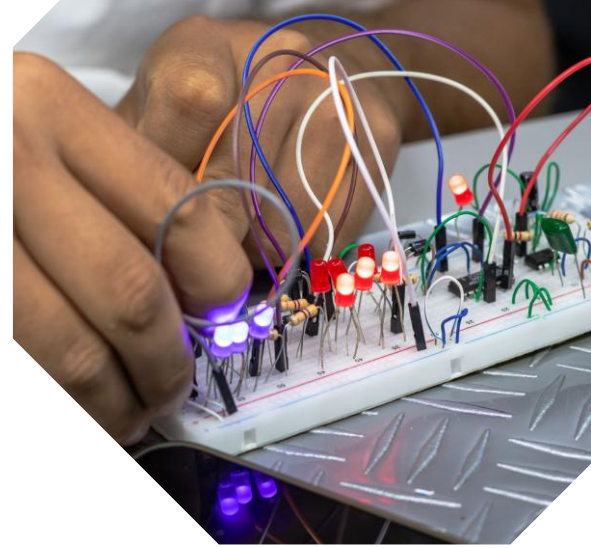
Occupation summary

This occupation is found in the aerospace, aviation, automotive, defence, logistics, pharmaceutical, energy, food and drink, and wider advanced manufacturing and engineering sectors which utilise automated equipment with integrated systems and interfaces, where the equipment contains a blend of technologies such as mechanical, electrical, electronic and control, and fluid power.

The broad purpose of the occupation is to ensure that plant and equipment perform to the required standard to facilitate targets regarding safety, quality, delivery, availability and cost within the aerospace, aviation, automotive, logistics, defence and wider advanced manufacturing and engineering sectors. Multi-skilled mechatronics maintenance technicians carry out a broad range of activities which may include installation, testing, fault finding, rectification, modifications and the on-going planned maintenance of complex automated equipment. This requires the application of a blend of skills, knowledge and occupational behaviours across the electrical, electronic, mechanical, fluid power and control systems disciplines. They prepare for the maintenance activity and inform stakeholders of work status. They also complete documentation, handover work, set up their work area and are required to be competent in safe engineering practices for their own safety and those around them. They may be required to work shifts, to work at height and in confined spaces, as well as dealing with equipment which may contain high voltages, high pressures, ionising radiation and other hazards.

In their daily work, an employee in this occupation interacts with a wide range of potential stake holders and others such as other technicians, engineering leaders, production operators, production leaders, business managers, customers, contractors, external agencies and members of the public. They may work in a range of environments including factories, hangers and workshops, as well as outside.

An employee in this occupation will be responsible for the quality and accuracy of the work they undertake within the limits of their personal authority, whilst complying with national and international legislation, civil or military regulatory and organisational requirements. All work must comply with health and safety legislation, environmental legislation and the employers own specific rules and guidance. They carry out complex maintenance activities on high value equipment across a wide range of equipment types and are responsible for the health



and safety of themselves, their colleagues and others who may be affected by the work. They are required to complete tasks within defined timescales. They need to work autonomously, professionally and responsibly to regulatory and organisational requirements. Depending on the organisation they may be required to work on their own or as part of a team. They are responsible for the correct use and fitness for purpose of tools and equipment, and for maintaining their own continued professional development.

Occupational duties

This apprenticeship Standard has a number of duties which someone working in the role would typically be able to undertake. These duties are underpinned by a range of KSBs which a successful apprentice will be able to demonstrate:

Duty	KSBs
Duty 1 Accept responsibility for the task and complete any preparatory documentation or opening of electronic recording that may be required to commence the task.	K1 K2 K3 K5 K8 K9 K15 K17 K23 K25 K26 K27 S1 S2 S5 S7 S8 S10 S13 S20 S25 B3 B4 B5
Duty 2 Plan and prepare the maintenance activities to cause minimal disruption to normal working, agree planned actions and obtain any required permits or permissions required to carry out the task. Communicate and report issues affecting equipment availability that may impact on operations.	K1 K3 K4 K5 K8 K9 K10 K11 K18 K23 K26 K27 K28 K31 K35 S2 S3 S4 S5 S7 S10 S25 B3 B4 B5
Duty 3 Select, obtain and prepare all resources required to carry out the task for example: tools, materials, documentation, permits. Carry out pre-use checks of equipment, tools and other resources.	K6 K7 K8 K9 K15 K18 K22 K23 K26 K27 S2 S5 S6 S7 S8 S10 S25 B3 B4 B5
Duty 4 Set up safe systems of work ensuring that statutory regulations and organisational compliance requirements are met.	K7 K8 K9 K10 K11 K15 K23 S2 S7 S8 S9 S20 B4 B5

Duty	KSBs
Duty 5 Manufacture, repair or refurbish components using a range of hand and machine tools.	K7 K8 K11 K21 K23 K26 K27 K34 K36 S6 S7 S10 S19 B3 B4 B5
Duty 6 Perform mechatronics maintenance activities ensuring all parts and consumables used in the maintenance activity comply with manufacturers specifications.	K2 K7 K8 K13 K14 K21 K23 K26 K27 K34 K35 K36 S3 S4 S6 S7 S9 S12 S14 S17 S19 B3 B4 B5
Duty 7 Revise, edit, update and store documentation. Comply with organisational policies and legislation regarding document and electronic storage.	K1 K3 K5 K15 K16 K17 K23 K25 K26 K27 K32 S1 S7 S8 S13 S15 S16 S19 S20 B3 B4 B5
Duty 8 Carry out planned preventative maintenance including functional, static and operational checks on complex equipment and assets.	K2 K6 K7 K8 K10 K13 K14 K18 K23 K26 K27 K35 S4 S6 S7 S9 S14 S15 S17 S19 B3 B4 B5
Duty 9 Apply condition monitoring techniques or use condition monitoring results (for example oil, vibration, thermal, NDT) to determine equipment condition.	K6 K7 K19 K20 K26 K27 S7 S16 S17 S19 B3 B4 B5
Duty 10 Use a range of test and measuring equipment (including both electrical and physical measures) and appropriate calculations required to carry out the task and to aid in fault diagnosis.	K2 K6 K7 K8 K12 K13 K14 K19 K21 K22 K23 K24 K26 K27 K30 K36 S1 S6 S7 S15 S18 S19 S28 B3 B4 B5

Duty	KSBs
Duty 11 Return equipment to operational condition, re-connect any ancillary equipment and services, and carry out required functional, static, quality and operational checks to confirm equipment serviceability and fitness for purpose.	K2 K6 K7 K8 K10 K21 K23 K24 K25 K26 K27 K36 S6 S7 S11 S21 S22 B3 B4 B5
Duty 12 Restore workplace and leave in a safe condition. Hand over completed work to responsible parties confirming completion of maintenance activities.	K1 K5 K7 K8 K15 K23 K26 K27 K28 S3 S6 S7 S11 S13 S15 S21 S22 S25 B3 B4 B5
Duty 13 Carry out continuous improvement and identify possible opportunities for improvements and efficiencies which add value to business activities.	K16 K26 K27 K29 K30 S23 S24 S27 B2 B3 B4 B5
Duty 14 Communicate with stakeholders to achieve work goals.	K3 K4 K5 K15 K31 K32 K33 S1 S11 S20 S25 S26 B1 B4 B5

Knowledge, skills and behaviours

Ref.	Knowledge and understanding All apprentices must complete	Assessment method
K1	Information technology: spreadsheets, presentations, word processing, email and digital collaboration tools.	Interview underpinned by a portfolio of evidence
K2	The typical engineering problems which may arise within the maintenance environment.	Interview underpinned by a portfolio of evidence
K3	How to plan and communicate activities.	Observation with questions
K4	Principles of equity, diversity, and inclusion in the workplace. Unconscious bias. Conscious inclusion.	Interview underpinned by a portfolio of evidence
K5	Fundamentals of engineering maintenance: documentation, safety checks, Standard operating procedures (SOPs), downtime, cost management, document validity.	Observation with questions
K6	Engineering materials and consumables, their structure, properties and characteristics, how and why engineering materials can fail.	Interview underpinned by a portfolio of evidence
K7	Engineering standards and regulations requiring compliance in the engineering workplace: British Safety (BS) or European standards (EN) and wiring regulations.	Observation with questions
K8	Health and safety regulations to include Health and Safety at Work Act 1974, Control of Substances Hazardous to Health (COSHH), Reporting Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR), Safe Systems of Work, Risk Assessments, Manual Handling, Lifting Operations and Lifting Equipment Regulations (LOLER), working at height,	Interview underpinned by a portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete	Assessment method
	personal protective equipment (PPE), Provisions and Use of Work Equipment Regulations (PUWER), Noise Regulations, Display Equipment Regulations, confined spaces, Dangerous substances and Explosive atmospheres regulations.	
K9	Organisational safety compliance requirements: permits to work, risk assessment, method statements, near miss and accident reporting, hazard reduction hierarchy including use of PPE.	Observation with questions
K10	Principles and procedures to identify and mitigate risks associated with electrical, mechanical, gas, air and fluids: isolation, dissipation of stored energy, lock off, tag out and verifying procedures.	Interview underpinned by a portfolio of evidence
K11	Principles and procedures to identify and mitigate hazards associated with work equipment: trailing leads or hoses, damaged tools and equipment, and damaged or poor fitting handles.	Observation with questions
K12	Principles, techniques and processes of sensory testing: sight, touch and smell.	Interview underpinned by a portfolio of evidence
K13	Principles of mechanical, electrical, electronic, control, robotic and AI applications. Knowledge of key technologies, fluid power, hydraulic, electrical, electronic, programmable logic controller's (PLC's), robotics, mechanical, control systems and how these are combined in complex mechatronics systems.	Interview underpinned by a portfolio of evidence
K14	Fault finding techniques used in reactive maintenance on complex integrated systems: half split, input output, six-point technique, function or performance testing, unit or component substitution and equipment diagnostics.	Interview underpinned by a portfolio of evidence
K15	Documentation: validity, compliance, traceability and audit, approval and change management processes.	Observation with questions
K16	Quality management systems and accreditations: ISO9001.	Interview underpinned

Ref.	Knowledge and understanding All apprentices must complete	Assessment method
		by a portfolio of evidence
K17	Maintenance and storage of software programmes and back-up copies.	Interview underpinned by a portfolio of evidence
K18	Processes and techniques of planned and preventative maintenance activities. Principles of equipment selection and use and minimising down time.	Observation with questions
K19	Principles, techniques and processes of non-destructive testing in a mechatronics maintenance environment.	Interview underpinned by a portfolio of evidence
K20	Condition monitoring methods and equipment used. How the information gained supports the planning of maintenance activities.	Interview underpinned by a portfolio of evidence
K21	Engineering, mathematical and scientific principles, methods and techniques used in the mechatronics maintenance environment: graphical expressions, symbols, formulae, units, measures, calculations and scaling.	Interview underpinned by a portfolio of evidence
K22	Principles of using and calibrating electrical and mechanical testing and measuring equipment.	Interview underpinned by a portfolio of evidence
K23	Types of engineering drawings and diagrams and their purpose.	Interview underpinned by a portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete	Assessment method
K24	Principles, procedures and benefits of full operational and functional tests and checks on maintained, repaired and installed equipment.	Observation with questions
K25	Principles, processes and importance of maintaining documentation: accuracy, engineering discipline and signatures.	Observation with questions
K26	Environmental hazards that can arise from maintenance operations. Types of pollution and control measures: noise, smells, spills, and waste. Environmental permits. Waste Electrical and Electronic Equipment Directive (WEEE).	Interview underpinned by a portfolio of evidence
K27	Sustainability principles and processes: the 3 'R's' (Reduce, Reuse, Recycle), segregation and disposal of waste and by-products.	Interview underpinned by a portfolio of evidence
K28	Principles and techniques of good housekeeping including '4S' and '5S'.	Interview underpinned by a portfolio of evidence
K29	Continuous improvement methods, concepts and techniques to collect and record data including graphical techniques.	Interview underpinned by a portfolio of evidence
K30	Data analysis principles used to identify trends and issues impacting operational performance.	Interview underpinned by a portfolio of evidence
K31	Verbal communication techniques. Giving and receiving information. Matching style to audience. Barriers in communication and how to overcome them.	Interview underpinned by a portfolio of evidence
K32	Written communication techniques. Plain English principles. Engineering terminology. Report writing.	Interview underpinned

Ref.	Knowledge and understanding All apprentices must complete	Assessment method
		by a portfolio of evidence
K33	Non-verbal communication techniques: gestures, facial expressions, tone of voice and body language.	Interview underpinned by a portfolio of evidence
K34	Principles and techniques for manufacturing, repairing and refurbishing components using hand and machine tools.	Interview underpinned by a portfolio of evidence
K35	Principles and techniques of conducting initial assessment of equipment that requires maintenance.	Observation with questions
K36	Techniques and processes used in reactive maintenance and repair activities on complex engineered systems such as electrical, electronic, mechanical, fluid power and control systems.	Interview underpinned by a portfolio of evidence

Ref.	Skills All apprentices must complete	Assessment method
S1	Use information technology, for example to create documentation, communication and information management.	Interview underpinned by a portfolio of evidence
S2	Obtain, read and interpret task related documentation, such as work instructions, quality control documents, drawings, operation manuals, specifications and service manuals.	Observation with questions
S3	Record information for example job sheets, risk assessments, equipment service records, test results, handover documents and manufacturers' documentation, asset management records, work sheets, checklists, waste environmental records and any legal reporting requirements.	Observation with questions

Ref.	Skills All apprentices must complete	Assessment method
S4	Conduct initial assessment of equipment that requires maintenance.	Observation with questions
S5	Formulate plans setting out the methodology of the maintenance activity including timescales and resources.	Observation with questions
S6	Select, prepare and use material, consumables, tools and equipment.	Observation with questions
S7	Comply with health and safety regulations and organisational requirements applicable in the workplace. For example, COSHH, PUWER, LOLER, PPE and applying safe systems of work.	Observation with questions
S8	Apply dynamic risk assessment, hazard identification and risk mitigation principles and techniques.	Observation with questions
S9	Apply isolation principles and techniques to equipment undergoing maintenance, including dissipation of stored energies as required.	Observation with questions
S10	Manufacture, repair and refurbish components using hand and machine tools.	Interview underpinned by a portfolio of evidence
S11	Restore the workplace on completion of the maintenance activity. Handover resources, consumables and equipment to process owner.	Observation with questions
S12	Apply the techniques and processes used in reactive maintenance and repair activities on complex engineered systems such as electrical, electronic, mechanical, fluid power and control systems.	Interview underpinned by a portfolio of evidence
S13	Produce, maintain, update, record and store documentation including electronic items such as PLC and robot programmes.	Interview underpinned by a portfolio of evidence

Ref.	Skills All apprentices must complete	Assessment method
S14	Apply techniques and processes used in planned and preventative maintenance activities on engineered systems such as electrical, electronic, mechanical, fluid power and control systems.	Observation with questions
S15	Apply functional testing and checking techniques and processes after maintenance interventions, and handover to the operational team.	Observation with questions
S16	Apply techniques and processes used in condition monitoring, non-destructive or sensory testing. Record findings and take necessary actions.	Interview underpinned by a portfolio of evidence
S17	Apply calculation techniques such as, feeds, speeds, tolerances, electrical calculations using Ohms law, power calculations and cable sizing calculations.	Interview underpinned by a portfolio of evidence
S18	Select, use and confirm calibration of electrical and mechanical testing and measuring equipment.	Interview underpinned by a portfolio of evidence
S19	Produce sketches or drawings to support maintenance activities.	Interview underpinned by a portfolio of evidence
S20	Communicate in writing. Prepare communications, documents and reports on technical matters.	Interview underpinned by a portfolio of evidence
S21	Segregate, separate and dispose of waste streams and by-products.	Interview underpinned by a portfolio of evidence

Ref.	Skills All apprentices must complete	Assessment method
S22	Apply 4S or 5S principles of housekeeping to the work environment.	Interview underpinned by a portfolio of evidence
S23	Identify opportunities and make recommendations to improve operational performance.	Interview underpinned by a portfolio of evidence
S24	Apply continuous improvement techniques.	Interview underpinned by a portfolio of evidence
S25	Communicate with others verbally. Negotiate with colleagues or stakeholders. For example, to access equipment or arrange access to equipment.	Interview underpinned by a portfolio of evidence
S26	Follow equity, diversity and inclusion procedures.	Interview underpinned by a portfolio of evidence
S27	Carry out and record planned and unplanned learning and development activities.	Interview underpinned by a portfolio of evidence
S28	Apply fault finding techniques used in reactive maintenance on complex integrated systems including half split, input output, six point technique, function or performance testing, unit or component substitution and equipment diagnostics.	Interview underpinned by a portfolio of evidence

Ref.	Behaviour All apprentices must complete	Assessment method
B1	Supportive of the needs and concerns of others, for example relating to diversity and inclusion.	Interview underpinned by a portfolio of evidence
B2	Committed to continued professional development (CPD) to maintain and enhance competence.	Interview underpinned by a portfolio of evidence
B3	Take personal responsibility for their own sustainable working practices.	Interview underpinned by a portfolio of evidence
B4	Take personal responsibility for and promote health and safety.	Observation with questions
B5	Act in a professional manner.	Observation with questions

Overall grade

This End-point Assessment is graded Fail, Pass, or Distinction. The EPA will be assessed and graded by the IEPA.

Information about how each assessment is graded can be found in the Assessment Instructions sections of this pack. The apprentice will fail an assessment method if they do not meet the assessment criteria.

Grades from the individual assessments will be combined to determine the overall grade.

All assessment methods are weighted equally in their contribution to the overall EPA grade. Performance in the EPA will determine the apprenticeship grade of Fail, Pass or Distinction.

In order to achieve an overall EPA 'Pass', apprentices must achieve a Pass in both assessment methods.

In order to achieve an overall EPA 'Distinction', apprentices must pass the Observation with Questions and achieve a Distinction in the Interview underpinned by a Portfolio of Evidence.

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

Assessment 1: Observation with questions	Assessment 2: Interview underpinned by a portfolio of evidence	Overall grading
Any grade	Fail	Fail
Fail	Any grade	Fail
Pass	Pass	Pass
Pass	Distinction	Distinction

The contribution of the assessments towards the EPA grade is as follows:

Assessment method	Grade scale	% contribution
Observation with questions	P/X	50
Interview underpinned by a portfolio of evidence	D/P/X	50
	Total	100

The overall EPA grade must be capped at a Pass if the apprentice has had to resit or retake any assessment method, however the grade the apprentice has achieved for each component is not capped and will be identified on the Statement of Achievement.

3. Gateway

The period will only start when the **employer** is satisfied that the apprentice is consistently working at, or above, the level of the Standard. The apprentice must be able to evidence that they fully demonstrate the Occupational Standard and required level of professional competence in an authentic workplace context. In making this decision, the employer could take advice from the provider, but the ultimate decision is made solely by the employer.



If there is a **provider** working alongside the employer, they should support the apprentice's preparation for Gateway.

The apprentice must provide the following at Gateway:

- confirmation that they are ready to take the EPA
- have fulfilled the English and mathematics requirement in line with the apprenticeship funding rules
- submitted a Portfolio of Evidence, and signed and dated evidence matrix.
- confirmation that they have passed one of the of the following mandated qualifications:
 - Level 3 Diploma in Advanced Manufacturing Engineering (Development Knowledge) or Pearson BTEC Level 3 Diploma in Advanced Manufacturing Engineering (Development Technical Knowledge).

The following should be completed on the Proficient platform:

- Gateway Declaration Form signed by the apprentice
- Gateway Declaration by the provider, on behalf of the employer and tutor, confirming that the apprentice has completed the minimum time required on-programme, in line with the apprenticeship funding rules

City & Guilds will confirm when all the Gateway requirements have been met.

The Assessment Instructions sections provide details about the evidence which must be submitted at Gateway.

4. Timetable for End-point Assessment



The EPA period is typically completed within 42 months of the EPA Gateway, starting when City & Guilds has confirmed that all Gateway requirements have been met.

Further information about the booking process and timelines can be found in the [City & Guilds Manual for the End-point Assessment Service](#).

Planning meetings are usually only provided for Standards where they are required by the Assessment Plan. The EPA Partnership Managers can provide additional guidance.

Ongoing during on-programme	Evidence and forms
Provider and Employer • Reviews progress as part of their regular performance management process and ensures apprentice's performance is on track • Identifies any gaps and creates a plan with the apprentice • Enrols apprentice on Proficient and provides 'Expected Date Ready for EPA' and (optional) 'planning meeting' • Review apprentice's Portfolio of Evidence and gives guidance and advice to the apprentice on content and suitability for submission	N/A
Apprentice • Completes the English and maths components of the apprenticeship in line with apprenticeship funding rules • Completes the mandated qualifications: ○ Level 3 Diploma in Advanced Manufacturing Engineering (Development Knowledge) or Pearson	Starts to collate: • Portfolio of Evidence

Ongoing during on-programme	Evidence and forms
BTEC Level 3 Diploma in Advanced Manufacturing Engineering (Development Technical Knowledge)	

Gateway	Evidence and forms
Employer - Reviews progress and ensures the apprentice is ready for EPA - Reviews evidence to confirm that it is appropriate and sufficient to meet the Standard	N/A
Apprentice - Must spend at least 12 months on-programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules - Submits Portfolio to inform the Interview	Submits to provider: - Apprentice Gateway Declaration - Evidence of achievement of English and maths qualifications required and mandatory qualifications - Portfolio of Evidence Signs: - Declaration of Authenticity Completes: - Evidence matrix for the Portfolio
Provider – on Proficient - Books EPA on the Proficient portal, in line with City & Guilds booking timelines in the EPA Manual - Makes City & Guilds aware of any additional needs of the apprentice so that they can review reasonable adjustments – see the current policy on the City & Guilds website, under EPA Documents Library - Completes Provider Gateway Declaration on behalf of the employer and tutor - Uploads evidence and forms onto Proficient	Complete on Proficient: - Provider Gateway Declaration Uploads onto Proficient: - Apprentice Gateway Declaration - Portfolio of Evidence and evidence matrix - Declaration of Authenticity

Gateway	Evidence and forms
	Evidence of completion of mandatory qualifications
City & Guilds EPA Team - Agrees with the provider and IEPA a mutually convenient date for the optional EPA planning meeting - Agrees with the provider and IEPA a mutually convenient date for the EPA Events	N/A

End-point Assessment	Evidence and forms
Apprentice Completes End-point Assessments in any order	N/A
Employer Ensures the apprentice has access to the resources required for the assessments	Signs and submits to provider: Declaration of Authenticity
IEPA - Reviews Portfolio of Evidence prior to EPA events - Carries out End-point Assessments - Grades each assessment, communicates the results to the LIEPA - Provides feedback for assessments in Proficient	Completes: - Observation with Questions Recording Form - Interview Recording Form - Feedback Form
LIEPA - Samples and quality assures assessments - Confirms overall grade to EPA Team	Reviews: - Observation with Questions Recording Form - Interview Recording Form - Feedback Form
City & Guilds EPA Team	N/A

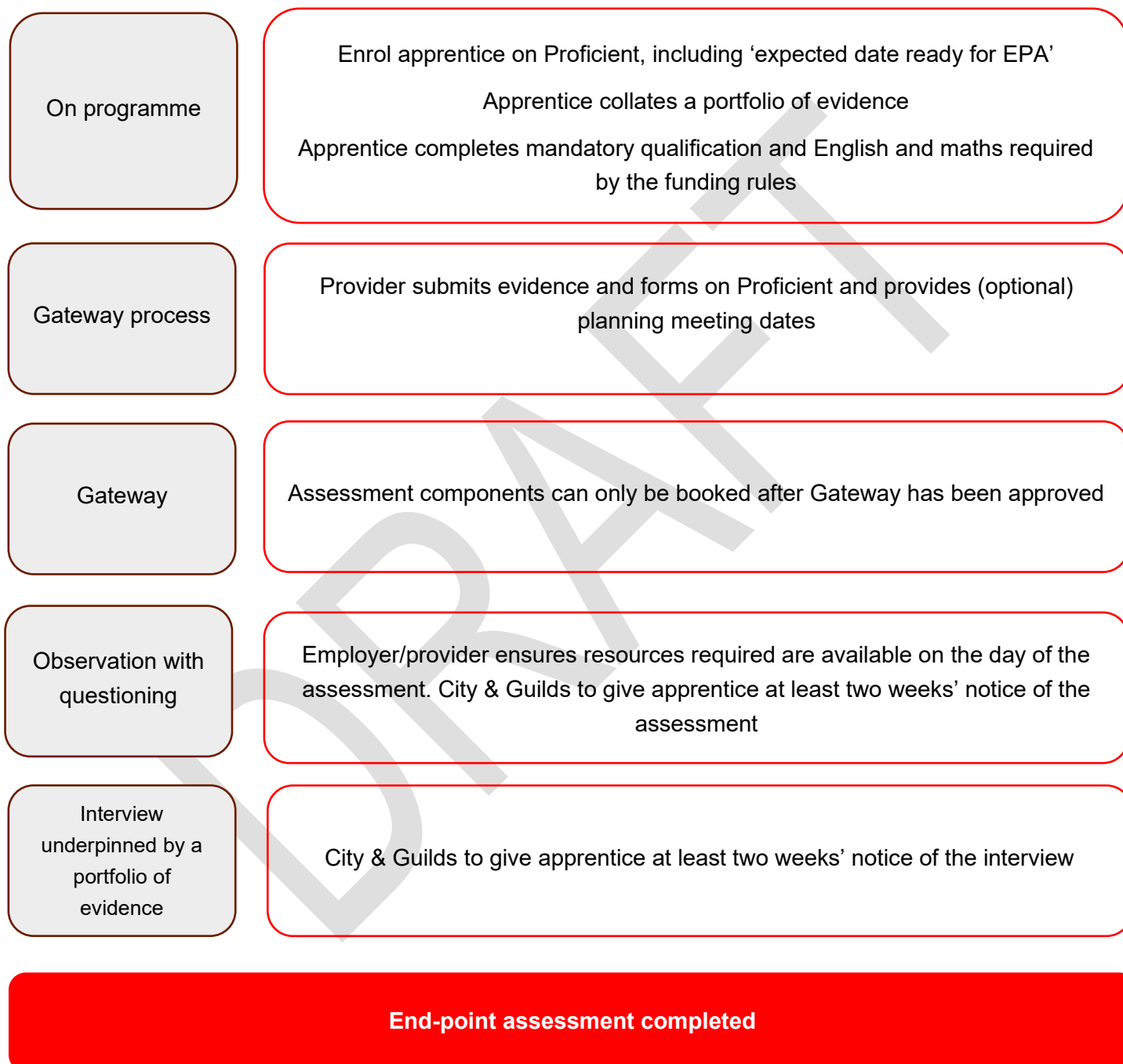
End-point Assessment	Evidence and forms
• Communicates the results to the provider via Proficient • Processes the overall result if the apprentice has passed all the assessments and advises IfATE, who issue the certificate. The data will be provided to IfATE once a month, on the fourth working day of the month	

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Summary timescales

Readers should check the previous Timetable and the Assessment Instruction sections of this document for the detailed requirements for each stage.

Further information on EPA Service Timelines can be found on www.cityandguilds.com.



5. End-point Assessment resources

Assessment method	Resources required
Observation with questions	• Correct PPE
	• Suitable workshop environment for the task
	• Correct consumables and materials for the task
	• Correct tools and equipment that is fit for purpose
	• Access to all relevant documentation, eg manufacture's specifications, SOPs, risk assessments, permit to work, method statements, data sheets
Interview underpinned by a Portfolio of Evidence	• Where applicable, internet access and suitable equipment for remote assessment as outlined in the manual for End-point Assessment services. The video-conferencing software will be advised at the point of booking
	• Quiet room, free from distractions and interruptions
	• A suitable room for the Interview to take place, large enough to accommodate the apprentice and IEPA
	• Seating area or room for any other apprentices to wait
	• Access to water and cups

6. Assessment information: 9336-700 Observation with questions

Overview

In the observation with questions, an independent assessor observes the apprentice in their workplace and asks questions. The apprentice completes their day-to-day duties under normal working conditions. Simulation is not allowed. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Rationale

This assessment method is being used because:

- this is a practical role
- it can assess KSBs holistically
- it should give employers assurance about an apprentice's competence as it takes place in a real work setting
- the familiar environment should allow the apprentice to perform at their best
- it is cost effective, tasks completed during the observation should contribute to workplace productivity and it makes use of the employer's resources and equipment.

Number of questions	The assessor will ask at least four open questions to seek clarification where required and to assess the level of competence against the grading descriptors. They may ask follow-up questions where clarification is required. Questioning must be completed within the total time allowed for the observation.
Grading	P/X To achieve a Pass the apprentice must achieve all of the pass grade descriptors.
Type of assessment	Observation with questions
Duration	3 hours (+10%)
Resources	See section 5 of this pack for information.

Location

The observation with questions must take place in the apprentice's normal place of work, for example, their employer's premises or a customer's premises.

In exceptional circumstances, where national security clearance and or restricted access, for example to normal working hours, exists to administer any of the assessment methods at an employer's site, the IEPA must take advice from the City & Guilds on access arrangements, and how to record assessment evidence in line with the employer's requirements. In these circumstances, any assessment materials relating to national security and commercial sensitivities must not be submitted to the City & Guilds.

Assessment specification

Description	Coverage	KSBs	Grade
Observation with questions	Preparation	K3 K5 K7 S2 S5 S6	X/P
	Health and safety	K9 S7 B4	
	Planned maintenance	K11 K18 K35 S4 S8 S9 S14	
	Testing	K24 S15	
	Restoring the work area and documentation	K15 K25 S3 S11 B5	

Assessment instructions

Delivery

The observation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An IEPA must conduct and assess the observation with questions. The IEPA must only observe **one** apprentice at a time to ensure quality and rigour. They must be as unobtrusive as possible.

The observation with questions cannot be split, except for comfort breaks or to allow the apprentice to move from one location to another. Such breaks will not count towards the total observed time.

The IEPA must explain to the apprentice the format and timescales of the observation with questions before it starts. This does not count towards the assessment time.

City & Guilds must give the apprentice 2 weeks' notice of the observation with questions.

Observation

The IEPA should observe the following during the observation:

- interpreting documentation
- planning work
- selecting consumables and materials
- using tool and equipment
- working safely
- working sustainably
- undertaking visual inspection and risk assessment
- isolating equipment
- carrying out planned or preventative maintenance
- completing checks and testing
- restoring the work area
- completing documentation and handover of equipment

These activities provide the apprentice with the opportunity to demonstrate the KSBs mapped to this assessment method.

Questioning

The IEPA must ask questions. The purpose of the questioning is to assess the level of competence against the KSBs and grading descriptors.

Questioning can occur during the observation. The time for questions asked during the observation is included in the overall assessment time. The IEPA must ask **at least four questions** during the observation. To remain as unobtrusive as possible, the IEPA should ask questions during natural stops between tasks rather than disrupting the apprentice's flow. Follow-up questions are allowed where clarification is required. The IEPA must use the questions from the City & Guilds question bank or create their own questions in line with City & Guilds training.

The IEPA must ask questions about KSBs that were not observed to gather assessment evidence. These questions are in addition to the set number of questions for the Observation with questions and should be kept to a minimum.

Duration

The observation must take **3 hours**. The IEPA can increase the time of the observation with questions by up to 10%.

The time for questions asked during the observation is included in the overall assessment time.

Ending the assessment early

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

Assessment location

The observation with questions must take place in the apprentice's normal place of work for example, their employer's premises or a customer's premises. Equipment and resources needed for the observation must be confirmed to be available by City & Guilds, who can liaise with the employer to provide these. They must be in good and safe working condition.

Questioning that occurs after the observation should take place in a suitable environment, for example a quiet room, free from distractions and influence.

KSBs and grading criteria

In order to support teaching and learning, the KSBs and grading descriptors can be found in Appendix 1.

Grading

The grading for the Observation with questions is:

- Pass/Fail.

The IEPA must make the grading decision. The IEPA must assess the observation and responses to questions holistically when deciding the grade.

7. Assessment information: 9336-701 Interview underpinned by a portfolio of evidence

Overview

In the interview, an independent assessor asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence.

Rationale

This assessment method is being used because:

- it assesses KSBs holistically and objectively
- it allows for the assessment of KSBs that do not occur on a predictable or regular basis
- it allows for assessment of responses where there are a range of potential answers
- it can be conducted remotely, potentially reducing cost

Number of questions	The IEPA must ask at least eight questions. Follow-up questions are allowed where clarification is required.
Grading	D/P/X To achieve a Pass the apprentice must achieve all of the pass grade descriptors. To achieve a Distinction the apprentice must achieve all of the distinction grade descriptors.
Type of assessment	Interview underpinned by a portfolio of evidence
Duration	60 minutes (+10%)
Resources	The apprentice will have access to and may refer to their Portfolio of Evidence during the interview, if required.
Location	A suitable room for the Interview to take place, large enough to accommodate all those involved.

Resources

Seating area or room for any other apprentices to wait.

Access to water and cups.

Where applicable, internet access and suitable equipment for remote assessment as outlined in the manual for End point Assessment services.

Assessment specification

Description	Coverage	KSBs	Grade
Interview underpinned by a portfolio of evidence	Equity, diversity and inclusion	K4 S26 B1	X/P/D
	Communication	K31 K32 K33 S20 S25	
	Information technology	K1 K17 S1 S13	
	Continuous improvement	K16 K29 K30 S23 S24	
	Condition monitoring and testing	K12 K19 K20 S16	
	Sustainability	K26 K27 S21 B3	
	Work environment	K28 S22	
	Maintenance activities	K22 K34 S10 S17 S18 S19	
	Fault diagnosis and rectification	K2 K6 K13 K14 K36 S12 S28	
	Professional development	S27	

Description	Coverage	KSBs	Grade
		B2	
	Knowledge evidenced through the mandatory qualification	K8 K10 K21 K23	

Assessment instructions

Delivery

The interview must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The IEPA must conduct and assess the interview. The purpose is to assess the apprentice's competence against the following themes:

- equity, diversity and inclusion
- communication
- information technology
- continuous improvement
- condition monitoring and testing
- sustainability
- work environment
- maintenance activities
- fault diagnosis and rectification
- professional development
- knowledge evidenced through the mandatory qualification

City & Guilds must give an apprentice 2 weeks' notice of the interview.

The apprentice must have access to their portfolio of evidence during the interview. The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence however, the portfolio of evidence is not directly assessed.

The IEPA must ask at least **8 questions**. The IEPA must use the questions from City & Guilds question bank or create their own questions in line with the City & Guilds training. Follow-up questions are allowed where clarification is required.

The IEPA must keep accurate records of the assessment. They must record:

- the apprentice's answers to questions
- the KSBs demonstrated in answers to questions
- the grade achieved

Portfolio of evidence requirements

The apprentice will compile a Portfolio of Evidence during the on-programme period of the apprenticeship, which will be submitted to City & Guilds at the Gateway stage. It should only contain evidence related to the KSBs that will be assessed by the Interview. It will typically consist of **ten** discrete pieces of evidence. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested

Evidence sources may include:

- workplace documentation and records, for example:
 - workplace policies and procedures
 - witness statements
 - annotated photographs
- video clips with a maximum total duration 10 minutes; the apprentice must be in view and identifiable.

This is not a definitive list; other evidence sources can be included.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

The portfolio of evidence is not assessed directly by the IEPA as it underpins the interview. The IEPA reviews the portfolio of evidence to prepare questions for the interview. They are not required to provide feedback after this review.

Before selecting the evidence to form the Portfolio, the apprentice should review:

- the criteria to be covered by the Portfolio

- the type of evidence that can be presented
- the amount of evidence that should be presented (typically ten pieces of evidence).

To assemble the Portfolio, the apprentice should consider all the evidence they have available that shows they have met the requirements being assessed.

The front of each Portfolio must include an evidence reference matrix which directs the IEPA to where in the Portfolio they can find the apprentice's work against the knowledge, skills and behaviours. The City & Guilds Evidence Matrix Form can be found within the 9336-12 Level 3 Mechatronics Maintenance Technician Provider and Employer Recording Forms.

Apprentices must reference the individual pieces of evidence against the KSBs clearly, for example, by identifying the evidence number, page number, file name or time stamp where appropriate.

Where necessary, confidentiality and data protection requirements must be adhered to, eg, permission for use of video/images containing identifiable third parties (eg, customers), anonymising of documentation and permission obtained from customers when submitting documents relating to them.

When the apprentice has selected the evidence to form their Portfolio, this must be reviewed by the employer and provider to ensure:

- all assessment requirements have been met
- there is no unnecessary duplication of evidence against the same criteria
- the work selected represents the best evidence available in relation to grading requirements
- the clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence
- authenticity of evidence has been established.

The training provider is responsible for providing guidance to the apprentice on compiling the Portfolio while on programme and this is to be reviewed by the employer prior to triggering EPA. The employer should provide suitable work for the apprentice to apply themselves to and discuss at Interview. A Portfolio checklist has been provided to support the training provider and the apprentice in the submission of the documentation.

The IEPA must have at least 2 weeks to review the supporting documentation.

Duration

The Interview must last for **60 minutes**. The IEPA can increase the time of the Interview by up to 10 % to allow the apprentice to respond to a question where necessary.

Ending the assessment early

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or City & Guilds must ensure the apprentice is fully aware of all assessment requirements. The IEPA or City & Guilds cannot suggest or choose to end the assessment methods early, unless in an emergency. The City & Guilds 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 the assessment early.

Assessment location

The interview must take place in a suitable venue selected by City & Guild, for example the employer's premises.

The interview can be conducted by video conferencing. City & Guild must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The interview should take place in a quiet room, free from distractions and influence.

Evidence requirements (including authentication of)

The IEPA must record the questions asked and grading descriptors achieved on the Interview Recording Form.

KSBs and grading criteria

In order to support teaching and learning, the KSBs and grading descriptors can be found in Appendix 2.

Grading

The grading for the Interview underpinned by portfolio of evidence is:

- Distinction/Pass/Fail.

The IEPA must make the grading decision. The IEPA must assess the observation and responses to questions holistically when deciding the grade

8. Resits and retakes

If the apprentice fails one assessment method or more, they can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate.



The employer and City & Guilds should agree the timescale for a re-sit or re-take.

- A resit is where the apprentice takes the assessment again without the need for new learning. Re-sit timeframe is typically 3 months.
- A retake is where the employer determines new learning is needed first. Re-take timeframe is typically 6 months.

Failed assessment methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade.

The apprentice will get a maximum EPA grade of pass if they need to re-sit or re-take one or more assessment methods, unless the City & Guilds determines there are exceptional circumstances.

9. Security, confidentiality and copyright of End-point Assessment materials

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- whilst the portfolio of an Apprentice may contain EPA assessment results referenced to the EPA assessment taken from time to time, they do not at any time contain the EPA Assessment Materials, unless otherwise stated in the individual Apprenticeship Standard; and the content of any EPA Assessment Materials is not made public in any format, whether in part or in full, at any time;
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10. Appendix 1 Observation with Questions KSBs and grading descriptors: 9336-700

Theme KSBs	Pass	Distinction
Preparation K3 K5 K7 S2 S5 S6	Obtains, reads, and interprets task related documentation to meet the needs of the maintenance activity in line with employer's procedures. (S2)	N/A
	Formulates a plan of work that sets out the methodology of the maintenance activity, including timescales and resources to meet the needs of the maintenance activity. (K3, K5, K7, S5)	N/A
	Selects, prepares, and uses materials, consumables, tools and equipment to meet the needs of the maintenance activity in line with health and safety procedures. (S6)	N/A
Health and safety K9 S7 B4	Takes personal responsibility for applying and promoting safe systems of work and complies with health and safety regulations and organisational requirements whilst meeting the needs of the maintenance activity. (K9, S7, B4)	N/A
Planned maintenance K11 K18 K35 S4 S8 S9 S14	Conducts an initial assessment of the equipment to meet the needs of the maintenance activity. (K35, S4)	N/A
	Applies dynamic risk assessment and hazard identification processes of the work environment and mitigates any risks in line with organisational policies to meet the needs of the maintenance activity. (K11, S8)	N/A
	Applies isolation principles and techniques to equipment undergoing maintenance, including dissipation of stored energies as required, in line with health and safety	N/A

Theme KSBs	Pass	Distinction
	regulations and organisational policies to meet the needs of the maintenance activity. (S9)	
	Applies techniques and processes used in planned and preventative maintenance activities on engineered systems in line with schedules and procedures. Explains how long-term operational efficiency and effectiveness of equipment is maximised, and how downtime is minimised. (K18, S14)	N/A
Testing K24 S15	Applies functional testing and checking techniques and processes after maintenance interventions in line with organisational procedures to meet the needs of the maintenance activity. (K24, S15)	N/A
Restoring the work area and documentation K15 K25 S3 S11 B5	Records information and completes reporting and documentation requirements to meet the needs of the maintenance activity in line with legal, organisational and manufacturer's requirements. (K15, K25, S3)	N/A
	Acts in a professional manner restoring the workplace and completing a return of resources and consumables, and handover of equipment to the process owner on completion of the maintenance activity in line with organisational policies and procedures. (S11, B5)	N/A

11. Appendix 2 Interview underpinned by a portfolio of evidence KSBs and grading descriptors: 9336-701

Theme KSBs	Pass	Distinction
Equity, diversity and inclusion K4 S26 B1	Explains how they support the needs and concerns of others and follow equity, diversity, and inclusion procedures in line with organisational policies and procedures. (K4, S26, B1)	None
Communication K31 K32 K33 S20 S25	Explains how they communicate in writing by preparing technical reports and documents using engineering terminology to meet the needs of the work activity in line with legal and organisational procedures. (K32, S20)	None
	Describes how they communicate with others verbally and apply non-verbal techniques to match their style to the audience. Explains how they negotiate with colleagues or stakeholders to overcome barriers in communication to complete work tasks. (K31, K33, S25)	
Information technology K1 K17 S1 S13	Outlines how they use information technology to produce, maintain, update, record and store electronic documentation in line with legal and organisational requirements. (K1, K17, S1, S13)	None.
Continuous improvement	Describes how they apply continuous improvement techniques to collect and record	Explains how they have agreed and implemented a business

Theme KSBs	Pass	Distinction
K16 K29 K30 S23 S24	data including using graphical techniques. (K16, K29, S24)	improvement. (K29, K30, S23, S24)
	Identifies opportunities and makes recommendations from data analysis to improve operational performance in line with organisational objectives. (K30, S23)	
Condition monitoring and testing K12 K19 K20 S16	Explains how they apply techniques to complete either condition monitoring, non-destructive testing, or sensory testing, including recording their findings and taking necessary actions, to meet the needs of the mechatronic maintenance activity in line with organisational processes. (K12, K19, K20, S16)	Identifies opportunities to implement condition monitoring that increase equipment serviceability. (K20, S16)
Sustainability K26 K27 S21 B3	Describes how they segregate, separate, and dispose of waste streams and by-products to support sustainability processes, taking responsibility for their own sustainable working practices in line with legal requirements and organisational policies. (K26, K27, S21, B3)	None
Work environment K28 S22	Describes how they apply techniques and principles of good housekeeping to the work environment, including '4S' or '5S', in line with organisational policies. (K28, S22)	Explains how they identify and implement housekeeping improvements in the work environment. (K28, S22)
Maintenance activities K22	Describes how they apply calculation techniques and produce sketches or drawings to support mechatronics	None.

Theme KSBs	Pass	Distinction
K34 S10 S17 S18 S19	maintenance activities in line with organisational and task requirements. (S17, S19)	
	Explains how they select, confirm calibration and use electrical and mechanical testing and measuring equipment to support mechatronic maintenance activities in line with organisational requirements. (K22, S18)	
	Explains how they manufacture, repair and refurbish components using hand and machine tools to meet the needs of the maintenance activity in line with organisational policy and procedures. (K34, S10)	
Fault diagnosis and rectification K2 K6 K13 K14 K36 S12 S28	Describes how they apply techniques and processes to complete reactive maintenance and repair activities on complex engineered systems in line with organisational policy and procedures. (K2, K6, K13, K36, S12)	Explains how they identify reasons for faults recurring and outlines preventative actions in line with organisational policy and procedures. (K14, K36, S12, S28)
	Explains how they apply fault finding techniques used in reactive maintenance on complex integrated systems including six point technique, function or performance testing, unit or component substitution and equipment diagnostics in line with organisational procedures. (K14, S28)	

Theme KSBs	Pass	Distinction
Professional development S27 B2	Outlines the planned and unplanned learning and development activities they have carried out and shows a commitment to future continued professional development to maintain and enhance competence. (S27, B2)	Explains how they maintain and update a continued professional development plan or log. (S27)
Knowledge evidenced through the mandatory qualification K8 K10 K21 K23	Achieved the Level 3 Diploma in Advanced Manufacturing Engineering (Development Knowledge) evidenced at the EPA gateway. (K8, K10, K21, K23)	None.

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City & Guilds

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