



INTRODUCTION

This section provides guidance on centre requirements for the approval and delivery of the customer service practitioner ST0072/AP02.

APPROVAL REQUIREMENTS

In order to use the IMI assessments for this apprenticeship standard a centre will need to be 'IMI Approved' and also be on the 'Register of Apprenticeship Training Providers'. Information and an up to date register can be found using this link:

<https://roatp.apprenticeships.education.gov.uk/download>

Guidance on centre set up, assessor requirements, rules and procedures can be found within the [Training Organisation Guidance Document](#) which can be found on the IMI website.

Centres wishing to apply to deliver this standard will need to ensure that they have read and fully understand the assessment plan, and the requirements they will need to adhere too as a training provider. To view the assessment plan follow the link below;

<https://www.instituteforapprenticeships.org/apprenticeship-standards/customer-service-practitioner/>

APPROVAL PROCESS

Centres wishing to apply to offer customer service practitioner will need to complete a **centre approval application** form via the IMI Centres Hub. The elements to be delivered must be chosen when creating the form. There are no mandatory gateways within customer service practitioner however the IMI are offering an apprentice support package that can be registered for as normal via web portal 2.

The options are as below;

- Customer Service Practitioner L2 ST0072/AP02 (AS-CSP-ASP) – *support package*
- Customer Service Practitioner End Point Assessment ST0072/AP02 (AS-CSP-EPA) – *EPA*

In addition, the IMI centre will need to complete the Apprenticeship Standard approval guidance checklist (see downloads [here](#)) which must be uploaded with their application in the **documents** section of IMI Centres Hub.

Upon receipt, an IMI EQA will complete a 'desktop' review of the application via Centres Hub. The IMI EQA will confirm whether or not:

- they have adequate training and staffing resources to deliver the element(s)
- the assessments are being completed correctly, and all other requirements are being met to deliver the element to the required standard

Once the EQA is satisfied that the centre meets the requirements, they will be granted full approval and be issued with an EPA contract.

This EPA contract is required to validate and confirm data the ESFA receives from ILRs submitted by the training provider for each apprentice. The training provider must return a signed copy of the EPA contract in order to gain full access to register apprentices.

Note: At this stage, should the EQA determine that the centre is not yet in a position to deliver the standard, the centre will be advised by the EQA what additional requirements are needed before a contract is issued.

ASSESSMENT REQUIREMENTS

End Point Assessment Gateway

The employer, and, if appropriate in conjunction with the Training Provider, will formally sign-off that the apprentice has met the minimum requirements in regards to knowledge, skills and behaviours within the standard and confirm they are ready to move on to the end assessment. This will happen during a meeting involving the apprentice, their line manager and the trainer.

End Point Assessment – Apprentice Showcase

The apprentice showcase is compiled after 12 months of on-programme learning. The Apprentice Showcase enables apprentices to reflect and present examples of their development over the whole on-programme period. With guidance from the employer and/or training provider the apprentice will select appropriate evidence from the on programme portfolio to demonstrate the minimum requirements of the standard at the final stage of the programme as an ‘Apprentice Showcase’.

End Point Assessment – Practical observation & Professional Discussion

The practical observation and professional discussion provides the opportunity for substantial synoptic assessment across the standard and must include customer interaction. The practical observation will be pre-planned and scheduled to when the apprentice will be in their normal place of work and will be carried out by the Independent Assessor.

End Point Assessment Professional Discussion

The professional discussion will be a structured discussion between the apprentice and the Independent Assessor, following the observation, to establish the apprentice’s understanding and application of knowledge, skills and behaviours. The professional discussion will need to take place in a suitable environment and should last for a maximum of one hour. The discussion will be against set criteria in the occupational brief to ensure standardisation and consistency.

Portfolio of evidence

Apprentices may develop and maintain examples of their work throughout their apprenticeship that cover the full standard. This could be in the form of a portfolio or other tracking method to be reviewed on-programme at intervals agreed by the employer and training provider, for example at 3, 6 and 9 months.

Re-sit/ Re-take

If any part of the assessment is not sufficient when first submitted, there will be an opportunity for resubmission, or observation or professional discussion to be repeated, however multiple assessment opportunities are not expected; all parties should be confident that the apprentice is ready to start the end point assessment with practice runs taking place before formal assessment is completed. Should the Apprentices fail any part of the end point assessment further development must be provided prior to a re-take.



MANDATORY QUALIFICATIONS

Functional Skills or equivalent

Apprentices will be required to have or achieve level 1 English and Maths and to have taken level 2 English and Maths tests prior to completion of their Apprenticeship

Note: Registration and certification of these qualifications are not included in the IMI package prices. These qualifications will be charged separately. Please use this link to view the latest fees information: <http://awarding.theimi.org.uk/Centres/Fees-and-Charges>.

EXTERNAL QUALITY ASSURANCE

External Quality Assurance for this apprenticeship standard will be administered by Ofqual.

REGISTERING LEARNERS

Registration will be made via IMI Web Portal 2, in batches or via spreadsheet upload. Learners can be registered for any/all elements in packages as detailed online. To see the current fees and charges please click [here](#).

Note: It is the centre's responsibility to ensure learners are registered on the correct package.

BOOKING AN EPA

Apprentices must be registered on an EPA package with the IMI, in order to be accepted for an EPA booking request. Please refer to 'Registering Learners' section for more information.

IMI have a 90 day booking policy which must be considered prior to requesting an end-point assessment (EPA) booking for apprentice(s). All EPA booking requests must be made a minimum of 90 days in advance of the desired EPA practical/skills date.

To request an EPA, please contact epa@theimi.org.uk.

For cancellations made within 30 days of the first confirmed EPA assessment date a full EPA charge will be applied. In the case that an EPA is cancelled due to exceptional circumstances such as, sudden illness that requires urgent medical attention or the death of a close family member the IMI will, where possible reschedule without loss of funds.

Note: It is the centres and employer's responsibility to ensure all pre-requisites are met according to the apprenticeship standard assessment plan the apprentice is registered against. There must also be a formal agreement between the employer, training provider and apprentice to confirm the apprentice is ready to undertake EPA.



RESULTS AND CERTIFICATING APPRENTICES

Within 21 working days of the last day of EPA IMI will provide result information to the Training Provider in order for the Training Provider to update the relevant Apprentice's ILR.

Training providers can claim certificates for apprentices upon completion of each gateway during on-programme learning on an apprenticeship standard with the IMI. Records of achievement for EPA are also available to claim for successful apprentices completing their end point assessment with the IMI.

IMI offer 'record of achievement's' for EPA only. This is to validate the apprentice has undertaken an EPA with the IMI and successful gained a pass or above in all elements of the end point assessment.

For claiming gateway certificates and records of achievements for EPA, please follow Section 6.1 of the operating manual.

The IMI do not issue the official apprenticeship standard certificate, however we do submit the claim on behalf of the apprentice under their consent.

At the end of each week the IMI will apply to the ESFA for the Certificate for any apprentices that have successfully passed EPA.

Issue Number	Effective Date	Amendments	Reason for Amendments
4	27 Jun 2019	<ol style="list-style-type: none"> 1. Added information re cancellation 2. Added re-sit/re-take information 3. Added result and certification information 	<ol style="list-style-type: none"> 1. Added for clarity around cancellation terms 2. Added for clarity regarding re-sit/re-take requirements 3. Further process information