



INTRODUCTION

This section provides guidance on centre requirements for the approval and delivery of the customer service specialist standard ST0071/AP01.

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-specialist/>

APPROVAL PROCESS

Centres wishing to apply to offer customer service specialist 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 specialist 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 Specialist L3 ST0071/AP01 (AS-CSS-ASP) – *support package*
- Customer Service Specialist End Point Assessment ST0071/AP01 (AS-CSS-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 EPA should only commence once the employer is confident that the apprentice has developed all of the knowledge, skills and behaviours defined in the apprenticeship standard and they hold a portfolio to evidence this. Employers in conjunction with the training provider will decide whether the full portfolio meets these requirements. Full time apprentices will spend a minimum of 15 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

End Point Assessment – Practical observation with Q&A's

Practical observations for the end point assessment must be carried out within 3 months from the start period of the end point assessment period. The apprentice must be observed, by an independent assessor, undertaking a range of day to day workplace activities. The observation should involve activities which allow the apprentice to demonstrate the full range of their knowledge, skills and behaviours required.

End Point Assessment – Work based project and interview

The work-based project is completed within 2 months from the start of the end-point assessment period. The interview will take place before the end of the 3 month end-point assessment period.

Apprentices must submit a written report, on a project they have carried out, to the EPAO 2 weeks prior to an interview date. This date will be agreed upon booking the EPA with the IMI.

The subject of the project report should be agreed with the EPAO with guidance from the employer in order to allow them to comment on appropriateness for their business but the EPAO must make a decision to ensure consistency

End Point Assessment Professional Discussion (supported by portfolio evidence)

The professional discussion must take place within 3 months from the start of the end point assessment period. Apprentices must submit the requested portfolio of evidence (10-15 pieces) to their EPAO 2 weeks prior to the professional discussion date. This date will be agreed upon booking the EPA with the IMI. During the professional discussion, evidence from the on-programme portfolio of evidence will be used as a base to support the professional discussion. The apprentice will extract, from their portfolio, evidence which is suitable for supporting them in their professional discussion.

Portfolio of evidence

Apprentices must develop and maintain, within a portfolio, examples of their work throughout their apprenticeship. This portfolio will be used by the apprentice to demonstrate to the employer that they are ready for EPA. Some evidence (which has not been assessed by the independent assessor) from this portfolio will be used at a future point to support the professional discussion.

Re-sit/ Re-take

Apprentices are able to retake/re-sit any individual assessment component where a pass has not been achieved. If a retake/re-sit is required, apprentices should complete retake/re-sits within 12 months. There is no limit to the number of retake/re-sits within the 12 months. An apprentice cannot retake/re-sit any part



of the EPA to increase their grade from a pass to a distinction. The maximum grade awarded to a re-sit will be pass, unless the EPAO identifies exceptional circumstances accounting for the original fail. If the apprentice fails the work based project they will be asked to rework their project taking account of feedback from the independent assessor. Apprentices will have 1 month to rework their submission.

Note: *The requirement is that the end-point assessment is completed within 3 months from the start of the end-point assessment period.*

MANDATORY QUALIFICATIONS

Functional Skills or equivalent

Apprentices without English and maths at level 2 on entry must achieve level 2 prior to taking their EPA. For those with an education, health and care plan or a legacy statement, the apprenticeship English and maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.

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"> Added EPA cancellation information Added resit/retake information Added result and certification information 	<ol style="list-style-type: none"> For clarity regarding cancellations For clarity regarding resit/retakes Further process information