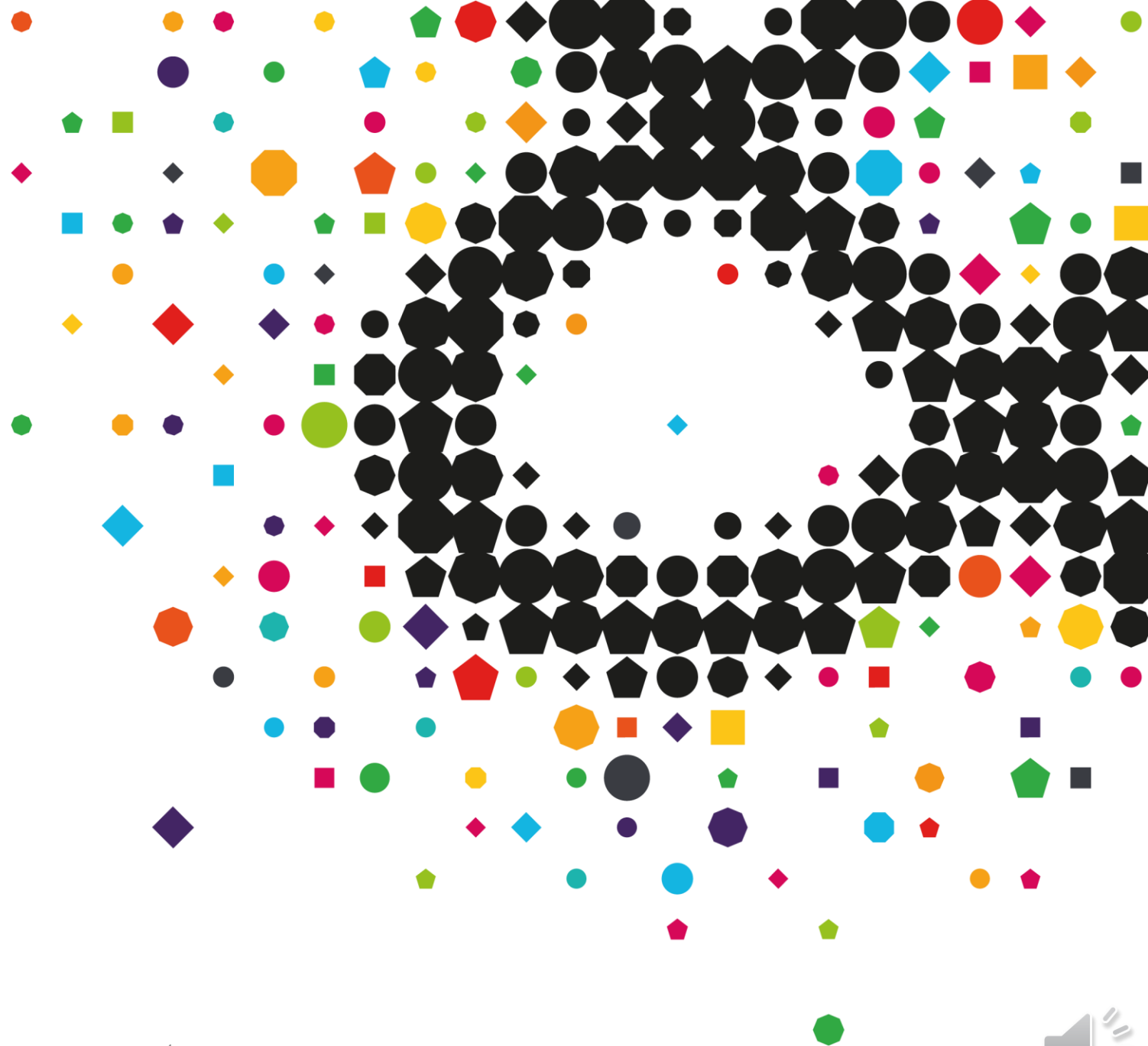


Submitting Gateway and the Planning Meeting



Contents

1. Introduction to Gateway
2. Where to find any paperwork you need
3. Uploading Gateway Evidence
4. Submitting Gateway Evidence
5. Pending, Rejected & Completed Gateway
6. The Planning Meeting



Please familiarise yourself with our 8 Stage Journey for EPA



We will focus on **Stage 4 & 5** in this presentation

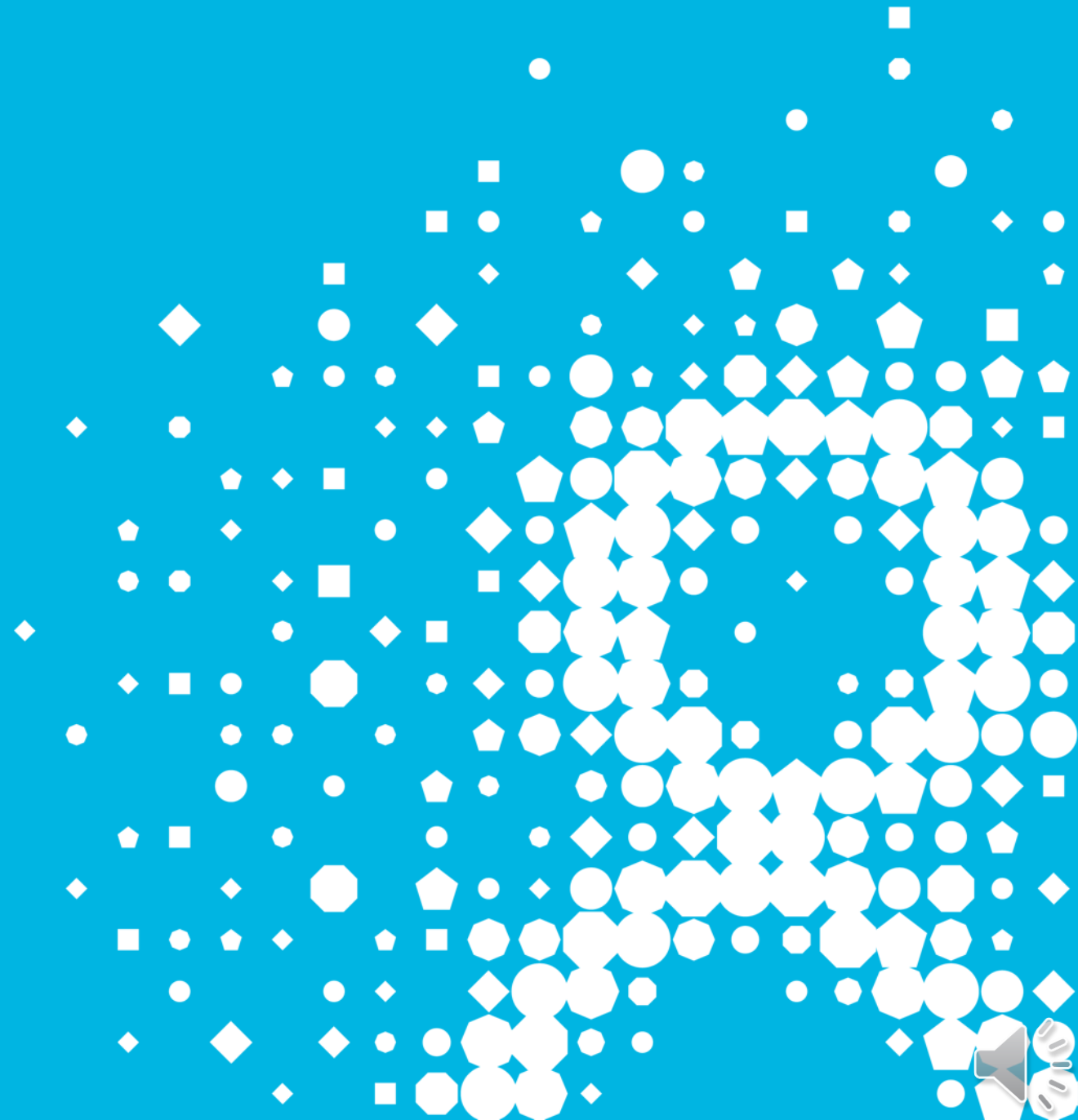
Access our Detailed 8 Stage Guide here....

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



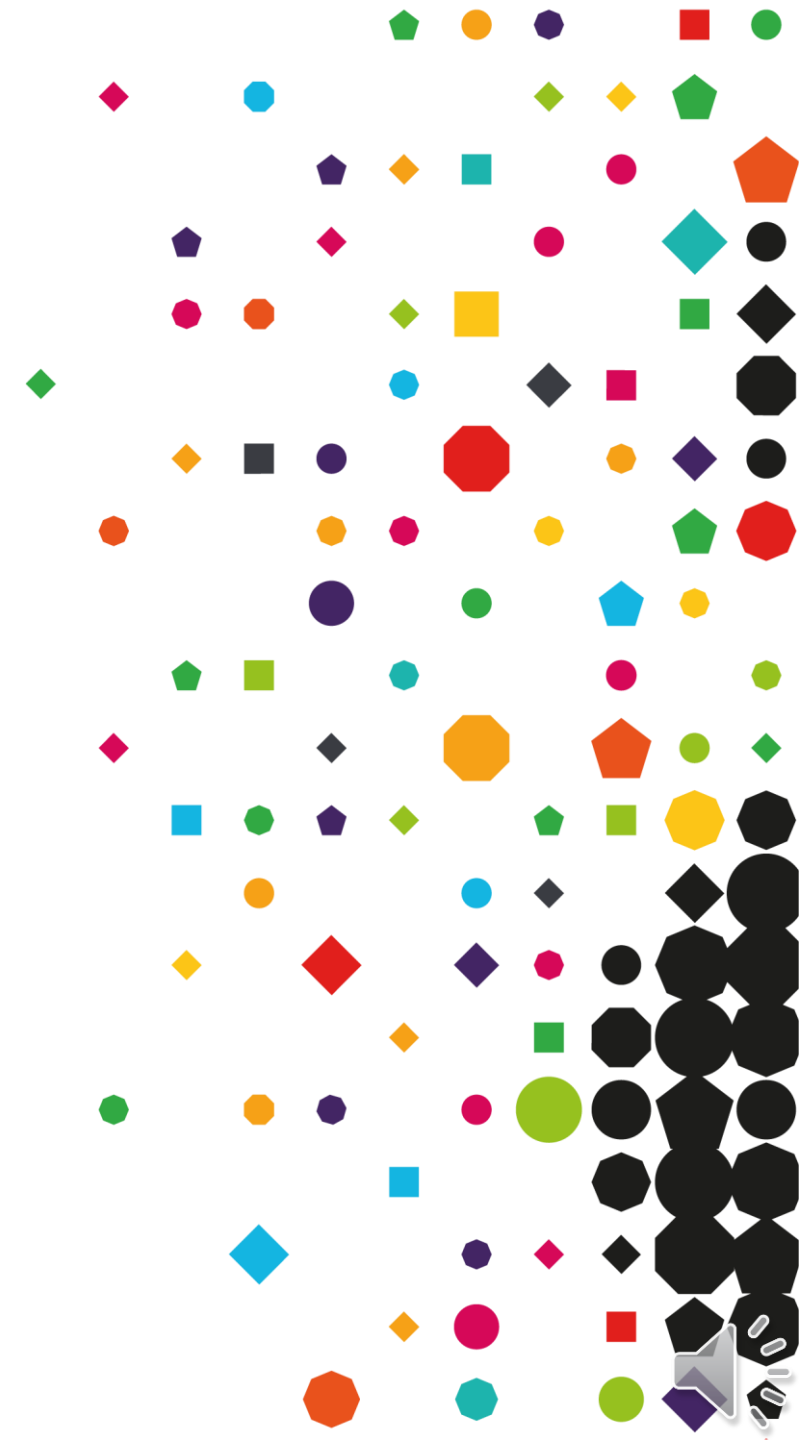
Stage 4. Gateway

What is it and how to submit and track progress?



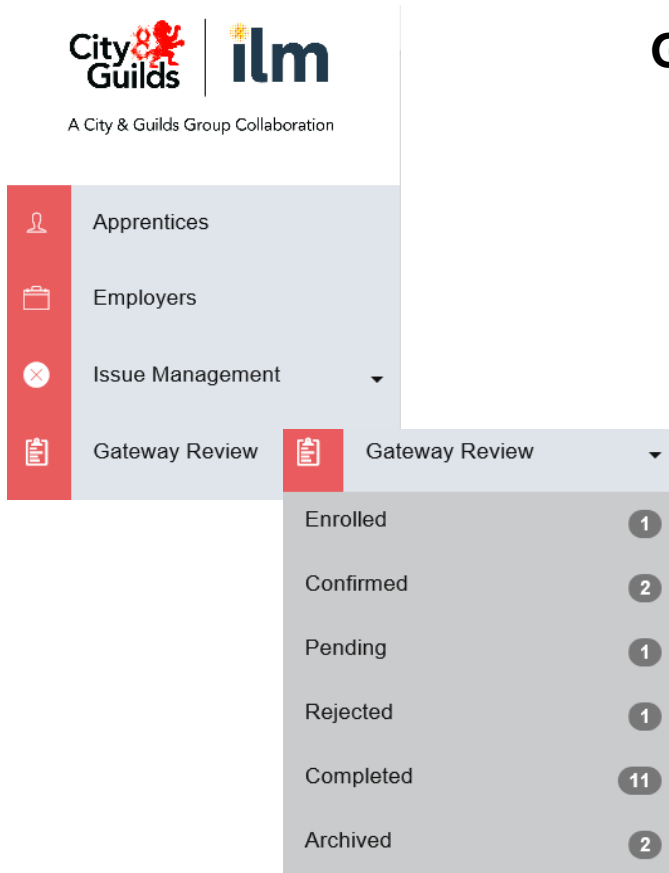
What is Gateway?

- In all Assessment Plans, it is an Employer who ultimately decides whether an Apprentice is confident and occupationally competent to take their EPA. This is known as 'Gateway.'
- At 'Gateway', the Employer and Provider must confirm that the On-Programme requirements have been completed by the Apprentice and that they are eligible to undertake the EPA
- To confirm this meeting has taken place, the Apprentice must sign a Declaration Form.
- For auditing purposes, the Gateway Declaration Form must be signed and dated by the Apprentice and then submitted to City & Guilds as part of the Gateway process.
- Where a mandatory qualification is included within the Apprenticeship, the results must be presented as part of the Gateway Evidence





Where do I find Gateway on EPA Pro?



Gateway Review on the main menu - The drop down shows:

- **Enrolled** – *where you will confirm the Estimated EPA Ready Date*
- **Confirmed** - *confirmed apprentices, ready for Gateway evidence to be uploaded and submitted*
- **Pending** – *gateways that have been submitted and are being reviewed by City & Guilds Gateway Team*
- **Rejected** – *rejected and in need of resubmission*
- **Completed** – *apprentices successfully through gateway*
- **Archived** – *apprentices who have now been archived as they have been certified*



Declaration and Planning Meeting Dates forms..

- Declaration and Planning Meeting Dates forms can be found under **Support Materials** then **Gateway Support** from the main menu.

View Support Materials

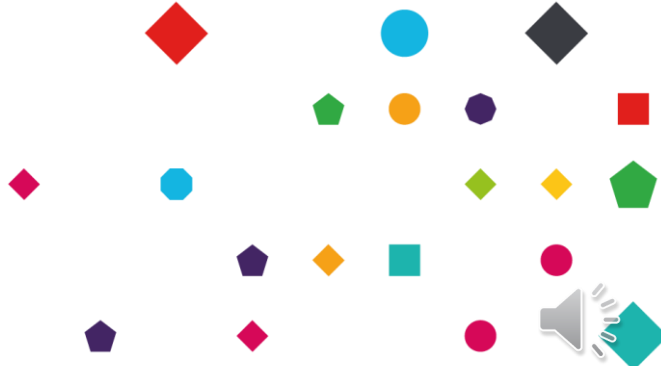
Search...

Categories

Gateway Support

Type	Title	Description	Updated	View
	Apprentice Gateway Declaration Form	Form to be filled in by the apprentice confirming that they have gone through the gateway process.	13/11/2020 13:59	Open
	English and maths equivalent qualifications	ESFA guidance on the acceptable current and prior equivalent qualifications for English and maths minimum requirements in apprenticeship standards and frameworks at level 2 and above.	13/11/2020 14:04	Open
	EPA Preferred planning meeting dates form	This form allows training providers to state their preferred dates, to speed up the planning meeting arrangements with the IEPA.	16/11/2020 14:40	Open



- Click **Open** to view and save the documents



Apprentice Declaration Form

- Please always access the form through EPA Pro as it will always be the most up to date version, using old gateway forms may impact your speed through gateway
- Only the Apprentice needs to complete this form
- The Provider will electronically sign a declaration on EPA Pro (on behalf of them and the employer) after they have uploaded all of the gateway evidence

EPA Apprentice Gateway Declaration Form

 
A City & Guilds Group Collaboration

Gateway Declaration

Apprentice Gateway Declaration Form

Apprentice Declaration

I confirm that I have gone through a gateway process with my provider and employer to check that I am eligible for EPA.

I give City & Guilds permission to apply to the ESFA and the Institute for Apprenticeships for the apprenticeship certificate on my behalf when I complete EPA.

I give City & Guilds permission to award me a Digital Credential (where these are available for my Apprenticeship.) By providing your email address to us, you agree that City & Guilds may share your email address with its digital credentialing partner, and authorise City & Guilds to issue a Digital Credential (Open Badge) to you upon successful completion of your end-point assessment.

*Find out more about digital credentials here <https://www.cityandguilds.com/digital-credentials>
Please note that when you receive an email from City & Guilds to claim your digital credential, you will need to create a free online account with our digital credential provider, which you can unsubscribe from at any time.*

Apprentice Name:
(please use black ink and block capitals)

Apprentice Signature:

Date: / /

Providers should submit this completed form to us through the End-point Assessment platform at the Gateway Declaration Stage.

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Planning Meeting Dates Form

- This form is an additional part of the Gateway process with City & Guilds
- It is to be completed by the Training Provider and the Employer, in agreement with the Apprentice, to propose 3 preferred dates for the planning meeting to take place
- Tick the relevant boxes to tell us who you'd like to attend the planning meeting – Please note by ticking the Provider box the Primary user from your centre will always be invited, if this is not the correct person to attend the Planning Meeting, please use the guest section and provide us with the attendee's name and email address.
- We'll tell you more about the planning meeting once you've got your apprentice through gateway


EPA planning meeting


Provider declaration and preferred dates


Apprentice name:

I can confirm I've liaised with the apprentice and employer (where required) and our combined preferred dates for our planning meeting with the IEPA are:

Date	Time
Click or tap to enter a date.	
Click or tap to enter a date.	
Click or tap to enter a date.	

 Please make the first date not sooner than 10 working days after submitting Gateway, to allow City & Guilds time to confirm acceptance of Gateway and to allocate an IEPA. We will endeavour to select the first of these dates where possible.

 Meetings are allocated a one-hour slot but typically take 15 minutes.

 If you don't have any preferred dates please leave the date/time table blank, but it will make the process more efficient if you do propose some dates if possible.

Please confirm who you'd like to attend the planning meeting (check the boxes):

<input type="checkbox"/>	Provider
<input type="checkbox"/>	Apprentice
<input type="checkbox"/>	Employer (please provide email address if the employer isn't created as an employer with EPA Pro access) Email:
<input type="checkbox"/>	Guest (please include email address and state role in EPA for reference) Email: Role:

Additional notes: (Is there anything else you want to tell us?)

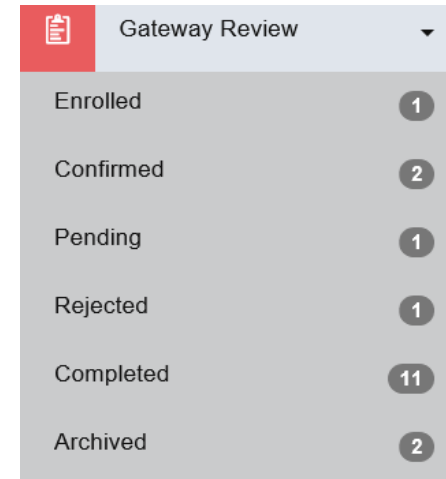
City & Guilds will now work to match you with an IEPA for your standard, who has availability for a planning meeting on the dates you have proposed. We'll be in touch to confirm which date the planning meeting will take place on and confirm details for the meeting.



Starting Gateway upload

From the main menu on the Dashboard, select Enrolled

This is where you will confirm the Estimated EPA ready date by selecting Confirm in the Action column. Alternatively you can edit the EPA date by selecting Edit EPA Date



A dropdown menu titled 'Gateway Review' with a clipboard icon. It lists various status categories with corresponding counts in circles:

Status	Count
Enrolled	1
Confirmed	2
Pending	1
Rejected	1
Completed	11
Archived	2

Enrolled - Awaiting Estimated EPA Ready Date Confirmation

Search... Filter by Standard Filter by Specialism Filter by Provider Filter by Employer

Filter by EPA Date

Apply Filters Clear Filters

First Name	Last Name	Provider	Employer	Standard	Specialism	Expected Start Date	Estimated EPA Ready Date	Actions
Apprentice	Ten	Provider 1		9494-12 Level 3 Customer Service Specialist		13/01/2019	14/01/2020	Confirm Edit EPA Date

Confirmed Gateway

Search... Filter by Standard Filter by Specialism Filter by Provider Filter by Employer

Filter by EPA Date

Filter by Confirmed

Apply Filters Clear Filters

First Name	Last Name	Provider	Employer	Standard	Specialism	Expected Start Date	Confirmed Date	Confirmed EPA Ready Date	Actions
Sandra	Smith	Provider 1	Employer 1	9308-22 Level 3 Team Leader/ Supervisor		06/09/2019	13/01/2021 10:55	07/09/2020	Process

Once you have confirmed the EPA Ready Date, the apprentice will move to the Confirmed section- Where you can upload and submit Gateway evidence by selecting Process.



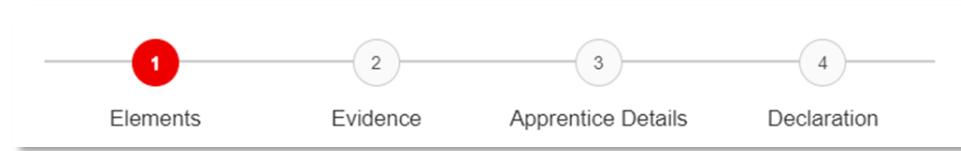
Uploading Gateway Evidence

Gateway for Sandra Smith

1 Elements 2 Evidence 3 Apprentice Details 4 Declaration

Elements

Gateway Element	Gateway Evidence
Apprentice Gateway Declaration A copy of the declaration form can be found in the support resources section. This needs to be signed by the apprentice and uploaded	<input type="button" value="Browse"/> <input type="text" value="Upload Name"/> <input type="button" value="Upload"/>
Preferred Planning Meeting Date Form Form to submit your 3 preferred dates for the planning meeting to take place and to confirm who you'd like present at the meeting. City & Guilds will then take these dates into account when scheduling the planning meeting and will confirm date and timing and the details for how to access the virtual meeting	<input type="button" value="Browse"/> <input type="text" value="Upload Name"/> <input type="button" value="Upload"/>
Level 2 Maths (or equivalent) "Equivalent to GCSE Grade C-A"(4-9) Note that if the certificate is in a different name then suitable evidence must also be supplied e.g. marriage certificate Details of which qualifications are acceptable as evidence, please go to the supporting documents and follow the link to "Equivalent Qualifications"	<input type="button" value="Browse"/> <input type="text" value="Upload Name"/> <input type="button" value="Upload"/>
Level 2 English (or equivalent)	<input type="button" value="Browse"/> <input type="text" value="Upload Name"/> <input type="button" value="Upload"/>



The elements tab will detail each element of gateway evidence we require
We always require

1. The Apprentice Declaration
2. Preferred planning meeting date form

Then for each standard we will detail all other evidence and whether we require an upload of the evidence or just confirmation of completion.

Use browse to find the file, name the file and select upload.

Please only upload the relevant evidence against each element.

If we need evidence of name changes etc. to match a required certificate please upload that alongside the component.



Gateway Submission

Gateway for Sandra Smith

Progress: 1 Elements, 2 Evidence, 3 Apprentice Details, 4 Declaration

Evidence

Notes

Optional Submission Notes

Notes page to add any additional information

Review/Edit and/or confirm Apprentice details

Gateway for Sandra Smith

Progress: 1 Elements, 2 Evidence, 3 Apprentice Details, 4 Declaration

Apprentice Details

Personal Details	
Unique Learner Number	1231231231
First Name	Sandra
Last Name	Smith
Email Address	SandraSmith@cityandguilds.mailinator.com
Ethnicity	
Gender	female
Date of Birth	07/09/1985
National Insurance Number	
Reasonable Adjustments	
Site Details	
Company Name	Unknown
Address Line 1	unknown
Address Line 2	

Prev Next

Edit Apprentice Details

Confirm Apprentice Details

Prev Next



Gateway Submission

Gateway for Sandra Smith

Approval & Declaration

Please ensure that all components are approved

Apprentice Gateway Declaration	<input type="checkbox"/>	Preferred Planning Meeting Date Form	<input type="checkbox"/>
Level 2 Maths (or equivalent)	<input type="checkbox"/>	Level 2 English (or equivalent)	<input type="checkbox"/>
Portfolio Completed	<input type="checkbox"/>		

I confirm that the apprentice has passed the employer gateway review, and there are accurate and authentic records that the apprentice:

1. Has the knowledge, skills and behaviours required by the apprenticeship standard and is eligible for EPA.
2. Has achieved eligible English and Maths qualifications at the appropriate level, or provided evidence of an exemption.
3. Has achieved mandatory on-programme qualifications (where applicable).
4. Has achieved other specific requirements, where these are listed in the assessment plan.
5. Will have completed a minimum of 12 months and 1 day on-programme before the first EPA assessment with City & Guilds.

Name

Signature _____

Gateway Completion Date

- Reconfirm all elements are approved and electronically sign the declaration statement on behalf of the provider and the employer
- All stages can be saved as they are worked on prior to final toggling of Submit Gateway

Submit Gateway

Checking this will submit the gateway for this apprentice. You will be charged in accordance with the agreed contract. This action cannot be reversed.

[Prev](#) [Submit Gateway](#)





Gateway Rejection or Acceptance

- The City & Guilds Gateway team will now review all submitted Gateway evidence
- Your apprentice will appear in Pending while the team review the evidence (upto 3 working days)
- Hopefully we've got all of the required evidence, in which case we can accept the Gateway and the apprentice will now show as completed. You'll receive a notification of this.
- If there are any issues with the gateway evidence submitted the Gateway team may reject the gateway, but we'll always explain the issue so that you're able to rectify and quickly resubmit

David Smith's gateway has been approved.
3 days ago
[Mark as read](#) [Delete](#)

Actions

[View](#) [View Rejections](#)

Gateway Rejections for Apprentice Three

Reason	Comment	Rejected Date
Missing/incomplete evidence	Wrong English certificate	27/07/2020 11:33

Gateway Review

- Enrolled 1
- Confirmed 2
- Pending 1
- Rejected 1
- Completed 11
- Archived 2



Stage 5. The Planning Meeting

What is it and how is it scheduled?



The Planning Meeting

- Once your apprentice has successfully passed through gateway they will be matched with their IEPA
- The apprentice and any workplace mentor will be informed by email and given the name of their IEPA
- The IEPA will take note of the dates and times on your preferred Planning Meeting dates form and will schedule the Planning Meeting
- All attendees at the planning meeting will receive invitations and GoTo Meeting links to join the meeting
- These are scheduled for 1Hr but typically only take 15-20 minutes
- The Planning Meeting is.....
 - *A chance for you and your apprentices to meet the IEPA ahead of the EPA event – so they won't be a stranger on the day!*
 - *For you to agree the sequence and dates for each EPA component matching everyone's availability*
 - *Where your IEPA builds these into an assessment plan and schedules the events into your EPA Pro calendar*
 - *Where everyone agrees when evidence is needed and when it is required for you to upload it to EPA Pro*



Manage Planning Meeting



On the Main Menu under **Planning** you can **Manage Planning Meetings**

- Apprentices
- Employers
- Issue Management
- Gateway Review
- Planning
- Cohort Bookings
- Manage Planning Meetings
- Assessment
- Support Materials
- Reporting

Manage Assessment Planning Meetings

Filter by Standard ▼

Filter by Specialism ▼

Filter by Status ▼

Apprentice	Standard	Specialism	EPA	Employer	Provider	Confirmed Assessment Planning Date	Status	Action
Apprentice One	9494-12 Level 3 Customer Service Specialist		Noel Smith	Employer 1	Provider 1	05/08/2020	Completed	<div style="display: flex; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">View Plan</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">View Meeting</div> </div>
Apprentice Six	9494-12 Level 3 Customer Service Specialist						Completed	<div style="border: 1px solid #ccc; padding: 2px 5px;">View Meeting</div>

Schedule Assessment Planning Meeting

Assessment Schedule

Date Scheduled:

Expected Duration:

Type:

Location:

Reschedule / Cancel Reasons

The attendees cannot be amended for a cancellation or reschedule.

Apprentice cannot attend

Employer cannot attend

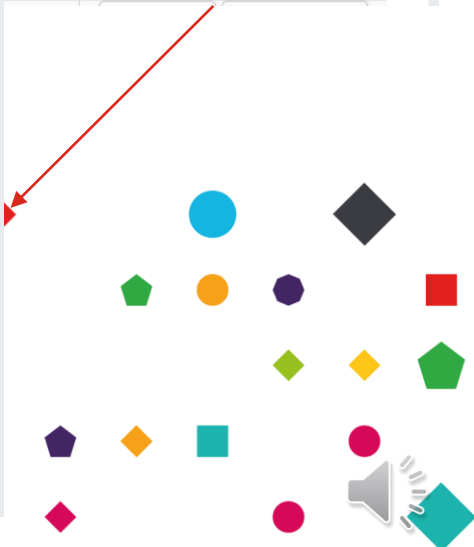
EPA cannot attend

Provider cannot attend

Reason Description:

Attendees

Attendee	Role	Email	Confirmed?	Date Sent
Adele Smith	Training Provider - Primary User	Adele.Smith@cityandguilds.mailinator.com	<input type="checkbox"/>	04-09-2020 11:00
Amanda Smith	Employer - Primary User	Amanda.Smith@cityandguilds.mailinator.com	<input type="checkbox"/>	04-09-2020 11:00
Jack Jones	Apprentice	jackjones@cityandguilds.mailinator.com	<input type="checkbox"/>	04-09-2020 11:00
Mandy Naylor	Guest	mandy.naylor@cityandguilds.com	<input type="checkbox"/>	04-09-2020 11:00



After the Planning Meeting

- Either in the planning meeting itself or shortly afterwards your IEPA will build the apprentice's assessment plan
- This will send out invitations to all the EPA events to those who need them, and dates will go into the EPA calendar
- You can view this plan at any time once a Planning meeting is finished by selecting View Plan

Manage Assessment Planning Meetings Book Meeting

Search: david smith

Filter by Standard Filter by Specialism Filter by Provider Filter by Employer

Filter by Status Filter by Manager

Apprentice	Standard	Specialism	EPA	Employer	Provider	Confirmed Assessment Planning Date	Status	Action
David Smith	9494-12 Level 3 Customer Service Specialist		Noel Smith	Employer 1	Provider 1	07/09/2020	Completed	View Plan View Meeting

Build Assessment Plan

Details

Assessment Plan Details

Apprentice Details

Schedule

September 2020

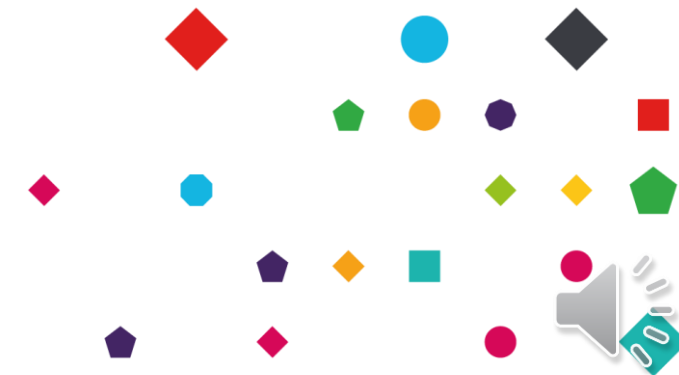
Key

- Current Assessment Plan
- Other Assessment Plan
- Assessment Planning Meeting

Components

- 9494-701 Practical Observation
- 9494-702 Presentation & Interview
- 9494-703 Professional Discussion

Read Only





Support and Feedback



Contact us via:
centresupport@cityandguilds.com



0844 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



Thank you

