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# End-point Assessment Invoicing and Pricing

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## Purpose

This policy sets out Open Awards approach to pricing for End-point Assessment (EPA) services. Open Awards aims to be clear and transparent in its practices and strives to offer value for money whilst maintaining its usual high level of service and quality.

## Scope

This document relates to the provision of apprenticeship EPA services.

## Regulatory Authorities

The relevant regulatory authorities are the Education and Skills Funding Agency (ESFA), the Institute for Apprenticeships and Technical Education (IFATE) and Ofqual. Every attempt has been made to ensure that the provisions of this document are consistent with the conditions of being on the apprenticeship provider and assessment register (APAR).. Where the requirements change, or where inadvertently this policy conflicts with those conditions, the latter shall apply. Where the requirements of the conditions are amended and require changes to this document, such changes will be made as soon as practicable and Open Awards will inform stakeholders accordingly.

## Audience

This policy is aimed at EPA customers, in particular employers and training providers but may be relevant to Open Awards staff, external quality assurance (EQA) providers and regulators.

## Approach to Setting Fees

In setting standard prices for EPA, Open Awards uses the relevant published apprenticeship Standard and assessment plan to determine the assessment components required and with full consideration to deliverability and affordability. Assessment plans may indicate an expected cost as a percentage of the maximum funding band. EPA should not normally exceed 20% of the funding band and would normally be between 10% and 20%. Only eligible costs are included as per APAP conditions of acceptance and a small element of profit as permissible by Department for Education.

Eligible costs are costs:

- ✓ associated with the administration, registration and examination of EPA as set out in the standard(s), and their assessment plan(s)
- ✓ associated with providing guidance and support and the materials (non-capital items) used in the delivery of EPA (equipment or supplies necessary to enable the assessment to take place)
- ✓ associated with ensuring trained staff and appropriate premises are available to deliver EPA

- ✓ associated with the development and maintenance of assessment instruments and tools
- ✓ to support any special arrangements are put in place to ensure any apprentices with special educational needs, disabilities or with another temporary or permanent debilitating condition can fairly access EPA
- ✓ associated with any further assessment required by the apprentice to achieve EPA (for instance retakes or resits)
- ✓ associated with ensuring consistent and robust internal quality assurance (for instance moderation and standardisation of assessment instruments and tools, assessors and assessment decisions)
- ✓ including any EQA charges Open Awards may incur.

There are no provider approval fees included and any on-programme qualifications if applicable are charged separately.

Prices are published on the Open Awards website and will normally be reviewed annually. Any changes will be communicated to providers in advance of the effective date, usually 1<sup>st</sup> August, should there be a change.

## Invoicing Timeline

5% of the total price will be invoiced to the training provider when the apprentices are registered with Open Awards.

All apprentices should be registered six (6) months prior to Gateway for EPA with Open Awards, in line with Apprenticeship Funding Rules. This will allow training providers and employers to have access to guidance documents and practice assessments and allow Open Awards to plan in a timely manner for EPA.

The 95% balance will be invoiced at Gateway stage once the required gateway declaration and submission of any required evidence has been confirmed.

Standard Price	Registration	Gateway
Prices for each apprenticeship standard can be found on our website	Apprentices should be registered as early as possible and at least three (3) months prior to EPA	The remaining balance will be invoiced on approval of the Gateway declaration/ submission
Example: £1000	5% £50	95% £950
	Invoiced the month following registration	Invoiced the month following approval of Gateway

## Resits and Retakes

Resits and retakes are an additional cost to the standard price invoiced as above. The price for a resit and retake of an assessment component can be found alongside the main EPA price for each standard on [www.openawards.org.uk/centres/pricing-information](http://www.openawards.org.uk/centres/pricing-information). Prices do not include reasonable Assessor travel costs which may be additionally charged where applicable.

Invoices for resits and retakes will be issued to the training provider when the assessment booking is made.

## Cancelling or Rescheduling a Booking

Provisional bookings can be re-scheduled or cancelled at no charge. Confirmed bookings can be re-scheduled at no charge up to 10 working days before the assessment day.

Confirmed bookings cancelled or re-scheduled with less than 10 working days' notice will incur relevant costs associated with the booking – see table below.

Cancellation of End-point assessment (first assessment or re-sit)	Cancellation/Rescheduling assessment fees
Within 5 working days (including 'no shows')	Charged at the Resit price for the relevant component plus Assessor travel costs etc., if incurred.
6 – 10 working days before	Administration fee £100

## Withdrawals or Transfers

All withdrawals or transfers to another EPAO will be recorded by Open Awards as a withdrawal following receipt of formal confirmation from the provider. It is the responsibility of the provider and employer to ensure they have made alternative assessment arrangements with another appropriate EPAO.

The 5% apprentice registration fee is non-refundable regardless of withdrawal or transfer date.

In the event an apprentice is withdrawn or transfers to another EPAO before they have gone through Gateway the 95% balance will not be invoiced.

In the event an apprentice is withdrawn or transfers to another EPAO after they have gone through Gateway, those assessment components that have been delivered

and/or where Open Awards have incurred costs in an attempt to deliver any assessment components will be charged. This may include, but is not limited to, costs associated with Gateway checks and administrative arrangements, cancellation of a confirmed booking (see section 8 above) or provided resource for delivery of assessment (e.g., allocated an assessor), but assessment was not carried out. The fee will be dependent upon circumstances and calculated on an individual basis.

Withdrawal of transfer to another EPAO	Fees
Before Gateway (i.e., prior to submission of the Gateway declaration)	No charge (5% Registration fee non-refundable)
After Gateway (i.e., after submission of the Gateway declaration)	Costs of checks and administration, plus assessment components that have been delivered and/or incurred costs in an attempt to deliver any assessment components

## Enquiries and Appeals

Please refer to the Enquiries and Appeals Policy for full details of the process and Open Awards Pricing Information for current prices. Any outcome that results in a grade being amended or an appeal upheld will result in a refund of the original fee.

## Invoice Format

Open Awards will create a customer account for every approved provider. All invoices will be emailed to the finance contact email address specified in the Expression of Interest Form, or an alternative address which has been confirmed in writing. All invoices will contain the following information:

- Open Awards company name and address
- Customer name and address
- Contact details
- Invoice date
- Invoice number
- Purchase Order number (if provided)
- Customer account number
- Description of charges - with a more detailed report attached where necessary
- Invoice amount

- Payment terms
- Bank details for payment
- Company number
- Charity number
- Website address for pricing information.

## **Payment Terms**

All invoices are payable within 30 days of invoice date. Statements will be issued where payments fall overdue. Open Awards reserves the right to withhold services for non-payment of invoices.

## **Purchase Orders**

Purchase order numbers will be quoted on invoices where provided. If a provider requires an order number to be quoted on their invoice it should be entered at registration in the appropriate field so that it will generate automatically within the invoice summary report.

## **Payment details**

All payment details are contained within the invoice template. Open Awards preferred payment method is Bacs or online bank transfer. Payment by debit/ credit card and cheque are also accepted.

## **Retention of Invoices and Data Protection**

Open Awards will retain invoices and supporting documentation for six years from the end of the financial period. Open Awards will comply with requirements of Data Protection legislation in relation to all personal or sensitive data. The data collected from customers will only be used for the purpose for which it has been collected and will not be disclosed to any unauthorised person or body. Personal data will be processed in accordance with the Open Awards registration under the Data Protection Act. Open Awards will not disclose information if to do so would breach a duty of confidentiality or any other legal duty.

Version	Date	Change(s) made	Section(s)	Publication source(s)
V1.0	May 2021	New Policy		Website/Portal
V1.1	May 2022	Link to Pricing Information updated.	7. Resits and Retakes	Website/Portal
V1.2	June 2023	Title amended to End-point Assessment Invoicing and Pricing Policy.  Cancellation/Rescheduling Table inserted  Responsibility paragraph and table removed showing TP responsible for payment on behalf of employer.	Title  8. Cancelling or rescheduling a booking  6. Invoicing Responsibility & Timeline now Invoicing Timeline	Website/Portal
V1.3	July 2024	Section added  Cancellation fee amended to £100	9. Withdrawals or Transfers  8. Cancelling or rescheduling a booking	Website/Portal