

**Level 5 Payroll Assistant Manager
V1.1 (ST0869)
End Point Assessment Specification**

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General Information

The Institute of Certified Bookkeepers (ICB) is an approved End-Point Assessment Organisation (EPAO) for the delivery of the End-Point Assessment (EPA) for the Level 5 Payroll Assistant Manager Apprenticeship Standard. ICB appear on the official Apprenticeship Provider and Assessment Register [here](#) under registration number EPA0066.

This specification provides information for training providers, apprentices and employers involved in the delivery of the Level 3 Payroll Administrator (v1.1) apprenticeship.

ICB have developed the EPA for the Level 5 Payroll Assistant Manager standard (v1.1) to meet the needs of the requirements as set out in the End-Point Assessment Plan [here](#), which was developed by a cross-sector group of employers together with input from training providers and professional representative bodies which make up the Payroll Assistant Manager Trailblazer Group.

To register apprentices for EPA with ICB, training providers must be on the Apprenticeship Provider and Assessment Register (APAR) and become an ICB Accredited Apprenticeship Training Provider (AATP). Details on how to apply to become an ICB AATP can be found [here](#)

Funding

The maximum funding for the Level 5 Payroll Assistant Manager is £11,000. Guidance on apprenticeship funding can be found on the Gov.uk website at [gov.uk/government/publications/apprenticeship-funding-bands](https://www.gov.uk/government/publications/apprenticeship-funding-bands)

Overview of the Level 5 Payroll Assistant Manager Apprenticeship EPA

A full-time payroll assistant manager apprentice typically spends 24 months on-programme.

The EPA should be completed within an EPA period lasting typically 6 months.

The apprentice must complete their training and meet the gateway requirements before starting their EPA. The EPA will assess occupational competence.

An approved EPAO must conduct the EPA for this apprenticeship. ICB is an approved EPAO for this standard. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

The EPA for the Level 5 Payroll Assistant Manager comprises three assessment methods to be completed only once the apprentice has finished the on-programme learning and passed through Gateway.

The three EPA assessment methods are:

1. Multiple-choice Test
2. Professional Discussion underpinned by portfolio
3. Project Report with Presentation and Questioning

The assessment methods can be taken in any order. Each of the knowledge, skills and behaviours (KSBs) included in the published apprenticeship assessment plan are mapped to one of the three assessment methods.

To achieve final certification of an overall pass, the apprentice must have achieved a minimum of a pass in each assessment method. A pass in the EPA will demonstrate that the apprentice can apply the KSBs required by this apprenticeship standard, meaning they are occupationally competent. Apprentices achieving a merit or distinction will be demonstrating performance above the minimum requirements of the occupational standard.

Gateway Requirements

The apprentice must spend the minimum duration on-programme and complete the required amount of off-the-job training in line with the [apprenticeship funding rules](#). For new starts from 1 August 2025, the minimum duration has reduced to 8 months (from 12 months). This policy change supersedes any reference to 12 month durations as currently set out in End-Point Assessment plans. For those apprentices that started before 1st August 2025, the 12-month minimum duration still applies.

The apprentice's employer must be content that the apprentice is consistently working at or above the occupational standard and has the evidence required to pass the gateway and is ready to take the EPA. The employer may take advice from the apprentice's training provider, but the employer must make the decision. The apprentice will then enter the gateway.

The apprentice must meet the following gateway requirements before starting their EPA.

They must:

- confirm they are ready to take the EPA.
- have achieved English and mathematics qualifications in line with the [apprenticeship funding rules](#).
- have completed a portfolio of evidence to underpin the Professional Discussion and be ready to submit this at Gateway.

For the Professional Discussion underpinned by portfolio:

- the apprentice must compile a portfolio of evidence during the on-programme period of the apprenticeship
- it must contain evidence related to the KSBs that will be assessed by the Professional Discussion and the evidence must be mapped against the KSBs
- the portfolio of evidence will typically contain 15 discrete pieces of evidence

- Evidence may be used to demonstrate more than on KSB; a qualitative as opposed to quantitative approach is suggested.

Please refer to the Level 5 Payroll Assistant Manager assessment plan [here](#) for more information on the portfolio of evidence requirements.

The apprentice must complete their training and meet the gateway requirements before starting their EPA.

Gateway Evidence

ICB uses ACE360, an online platform which provides ICB with an Apprenticeship management solution to End-Point Assess Apprenticeship Standards.

Once the apprentice is ready for Gateway, all required evidence as detailed in the Gateway Requirements above will be uploaded to the ACE360 platform by the apprentice's training provider. A Gateway Declaration Statement form must also be completed and signed by the apprentice, the employer and the training provider and uploaded with the evidence. This is to confirm the employer is content that the apprentice is occupationally competent and ready for EPA.

The Declaration Statement and Gateway evidence will be submitted via ACE360 by the training provider to ICB. ICB will check the evidence to ensure it meets the requirements of Gateway before approving.

EPA Conditions & Levels of Attainment

The EPA will take place following the On-Programme learning and once the apprentice has met all the requirements of, and passed through, Gateway. The EPA should only start once the employer and training provider are satisfied that the apprentice is ready and the requirements for EPA Gateway have been met and can be evidenced.

The apprentice must have:

- completed training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship's standard
- completed training towards English and mathematics qualifications in line with the apprenticeship funding rules
- compiled the portfolio of evidence to underpin the Professional Discussion

Duration of the EPA Period

The EPA is taken in the EPA period which is typically 6 months after passing through Gateway. The EPA period starts when ICB confirms the gateway requirements have been met.

Methods of Assessment

This EPA has 3 assessment methods – a multiple-choice test, a professional discussion underpinned by portfolio and a project report with presentation and questioning.

Multiple-choice Test

This assessment method gives the apprentice the opportunity to demonstrate the knowledge and skills mapped to this assessment method.

The purpose is to assess the apprentice's competence to both comprehend the payroll landscape and apply this to payroll issues which is a key occupational competence.

Delivery

The test is structured to give the apprentice the opportunity to demonstrate competence covering the KSBs mapped to this assessment method to the highest available grade.

The test is computer based and delivered online via the ICB e-assessment platform, Rogo. The duration of the test is 120 minutes.

The test will consist of 50 multiple-choice questions, each of which will have four options, including one correct answer. Included within these 50 questions, there will be 25 scenario-based questions and 25 questions being knowledge recall. The test will require the apprentice to perform a range of payroll calculations.

The test is open book which means that the apprentice can refer to the reference books or materials whilst taking the test. The apprentice will also be allowed access to the internet for research purposes but **not social networking sites**. Use of a calculator is also permitted.

ICB uses remote invigilation software to ensure the test is delivered and conducted under controlled invigilated conditions. Remote Invigilation for the exam requires (a) reliable internet broadband and (b) a smartphone or tablet. Once the apprentice accesses the test, full instructions will be available with a step-by-step guide for setting up the remote invigilation prior to starting the test.

The test will be booked with ICB by the apprentice's training provider who will give at least 10 working days' notice to the apprentice of the booking. Once booked, the apprentice will have 14 days from the time of booking to access and complete the test.

The Knowledge Test will assess the following KSBs:

K4	Principles for recording statutory requirements for all sickness and parental leave payments (SMP, SAP etc).
K5	Principles for recording new starter information, including the implications for mistimed payments of Income Tax and National Insurance.
K6	Eligibility for the Employment Allowance and the associated information requirements.
K8	Employer liability for UK taxes such as National Insurance, Apprenticeship levy etc. including any implications of sharing with the devolved administrations.
K11	Tools and techniques for analysing and determining complex payroll cases, for example, researching the national insurance implications for late payments to starters.
K13	The processes and manual calculations to follow when operating complex payroll including but not limited to National Insurance Contributions and Income Tax deductions.
K14	The different UK pension scheme tax relief mechanisms and the potential impact in the workplace.
K15	The techniques for manually calculating and processing benefits-in-kind and “payrolling”, including the benefit and expenses exemptions that exist and PAYE Settlement Agreements (PSAs)
K16	The process for managing the processing of off-payroll workers (also known as IR35 and deemed workers) in the payroll system.
K17	The range of payments made to leavers and termination payments (upon redundancy and/or voluntary leavers).
K27	Techniques and requirements for preventing discrimination and promoting equal opportunity, in line with the Equality Act 2010 in Great Britain and the Disability Discrimination Act 1995 in Northern Ireland.
S4	Identify & source all of the information required in a complex payroll case to enable accurate calculation.
S5	Analyse and determine complex payroll cases, including pensions, pay and benefits, considering all relevant data and other evidence.

Assessment location

The Multiple-choice Test can be taken in a quiet room, free from distractions and influence. This could be at the training provider or employer’s premises or a suitable room at home. Remote Invigilation for the exam requires (a) reliable internet broadband and (b) a smartphone or tablet.

Professional Discussion underpinned by Portfolio

This assessment method is structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

It is a holistic assessment method allowing the apprentice to evidence the KSBs in an integrated way, allowing the apprentice to demonstrate evidence that they can perform the role in a different context or at large/small organisations in order to evidence transferable skills. This assessment method also allows the apprentice to reference experience gained as part of the on-programme journey.

Delivery

The Professional Discussion is conducted by an independent assessor engaged and trained by ICB. The apprentice’s training provider will book the Professional Discussion with ICB on behalf

of the apprentice at a time suitable for both the apprentice and the independent assessor. ICB will give the apprentice a minimum of 10 days' notice of the discussion date and time.

The Professional Discussion will be conducted using an online video meeting platform such as Teams or Zoom. A meeting invitation for the discussion will be sent to the apprentice at least 10 days prior to the date of the discussion.

The Independent Assessor will review the portfolio of evidence prior to the Professional Discussion taking place. However, the portfolio of evidence is not directly assessed.

The Professional Discussion will last for 90 minutes, and the Independent Assessor can increase the time of the interview by up to 10%. This time is to allow the apprentice to complete their response in full. The independent assessor will ask a minimum of 15 questions and may ask follow-up questions to either probe replies further and/or seek clarification on rationale.

The apprentice must have access to their portfolio of evidence during the Professional Discussion and may refer to and illustrate their answers with evidence from portfolio. However, the portfolio itself is not directly assessed.

The Independent Assessor will record the Professional Discussion using the online platform's recording facility. During the discussion the Independent Assessor will make written notes of the apprentice's answers to questions and the KSBs demonstrated.

The Professional Discussion must take place in a suitable venue, in a quiet room, free from distractions and influence.

The apprentice will need to show the Independent Assessor valid photo ID before the discussion takes place.

The Professional Discussion will assess the following KSBs:

Knowledge	
K2	The impact the organisational mission, objectives and values have on successful payroll delivery and how this is measured by key performance indicators.
K7	The lifecycle of an organisation's payroll and the impact of business change.
K9	The techniques for negotiating and influencing stakeholders to achieve desired outcomes
K10	A range of verbal and written communication techniques for adapting approaches to suit audiences.
K12	The techniques for identifying and sourcing data that impacts the determination of complex payroll issues.
K18	How advances in technology (for example, evolving artificial intelligence (AI) and automation) and software increasingly impact the UK-wide payroll function. The comparative benefits and risks of cloud-based and integrated HR /payroll solutions.

K19	Techniques for managing and motivating diverse teams to meet client/customer payroll requirements.
K20	How payroll, employment and pensions legislation and guidance is created across each of the devolved nations that form the UK. This includes how to distinguish between primary and secondary legislation and how primary legislation and regulations work together.
K25	Techniques for forecasting staffing requirements against the payroll workload.
K26	How the recruitment and selection lifecycle in different organisations impacts successful payroll delivery.
K28	The principles of how to develop yourself and your team.
K30	How to identify and manage suspected fraud and criminal activity in the payroll environment, including, for example the prevention of money laundering, complying with the Money Laundering Regulations.

Skills	
S2	Manage the provider/customer and other stakeholder relationships necessary to influence successful payroll outcomes (including delivery, customer care and enquiry handling).
S3	Communicate complex payroll concepts to customers and other less technical stakeholders. Communicate effectively at different levels of the organisation, selecting an appropriate communication method for the audience.
S6	Balance the trade-offs between automated and non-automated payroll approaches. Identify and complete payroll calculation manually where needed.
S7	Match the payroll decision needed against the skill sets within your team and the risks involved when determining who should deliver the work.
S10	Adjust leadership style to achieve results, having regard to both individuals within the team and how the team works together.
S11	Interpret and apply all payroll legislation, guidance and case law pertinent to a complex case.
S12	Quality assure your own and your team's payroll calculations to ensure accuracy and compliance. Ensure that you and your team act compliantly when transacting customer payroll by deploying a quality assurance process proportionate to the payroll issues
S13	Make recruitment and retention decisions/recommendations, as necessary.
S14	Co-ordinate and manage your team's payroll workload in order to meet key performance indicators and contractual obligations.
S15	Reconcile your team's final payroll run.

Behaviours	
B1	Represents the payroll profession with integrity and professionalism.
B3	pen-minded to the needs of others. Self-aware of their own behaviours/values and the impact this can have on others
B6	Reflects on own effectiveness and seeks out professional development to enhance performance. Encourages others to do the same.

Further details on the KSBs assessed via this method can be found within the Assessment Plan [here](#)

Assessment location

The Professional Discussion must take place in a suitable venue, for example the training provider's or employer's premises. The interview should take place in a quiet room, free from distractions and influence.

Project Report with Presentation and Questioning

This assessment method involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The Project must start after the apprentice has gone through Gateway. It is structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice will conduct a project which may be based on any of the following:

- a contemporary payroll issue affecting the wider industry. This will require the apprentice to analyse the issue, assess the impact on their organisation or a potential client, and draft interpretive guidance documentation that others can follow
- a review of, and changes to existing organisational guidance documentation in relation to either a specific process or a range of processes dependent upon the complexity of the organisation
- a review and implementation of new organisational guidance documentation in relation to either a specific process or a range of processes dependent upon the complexity of the organisation

This is a holistic method of assessment to provide the opportunity to assess a wide range of Knowledge, Skills and Behaviours. The project allows the apprentice to analyse a complex payroll issue, draw their conclusions and provide guidance to others which replicates the typical real-world environment.

The assessment method has two components:

- Project with a project report
- Presentation and Questioning session

Delivery

Component 1 - Project with a Project Report

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

As a minimum the Project Report must include:

- executive summary
- an introduction – what is the project/activity about?
- the scope of the project (including key performance indicators)
- a project plan
- project research and findings

- evaluating potential solutions
- project outcomes and how these outcomes were achieved
- recommendations and project conclusions

The project output must be in the form of a report. ICB will provide a Report Template.

The apprentice must start the project after the gateway. The employer should ensure the apprentice has the time and resources, within the project period, to plan and complete their project. The apprentice should be subject to normal line management controls whilst completing the project.

The project report must have a word count of 5000 words. A tolerance of 10% above or below is allowed. Appendices, references and diagrams are not included in this total. The apprentice must complete and include the ICB mapping grid in an appendix, showing how the report evidences the KSBs mapped to this assessment method.

The apprentice must complete and submit the Project Report to ICB by uploading it to the e-assessment platform, Rogo, by the end of week 12 of the EPA period.

Component 2 – Presentation and Questioning

The presentation involves the apprentice presenting to an ICB independent assessor, focusing on the project work and the final project report. It will be followed by questioning from the independent assessor. The apprentice will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

The presentation content will be completed and submitted after the gateway and will be presented to an ICB independent assessor via online video conferencing.

The presentation content must be prepared by the apprentice and submitted within 2 weeks of submitting the project report to ICB via the online e-assessment platform. ICB will make the content available to the independent assessor 1 week prior to the presentation. This will allow the independent assessor sufficient time to review it and prepare appropriate questions.

The presentation will be based on the project report carried out in component 1 and will cover a summary of the project and report. The presentation should include:

- description as to the scope of the project report – which payroll issues are being presented and their approach to the project
- justify the solution adopted and methods used to deliver the project
- review of the effectiveness of the solution • summary of achievements, challenges and lessons learnt

To deliver the presentation, the apprentice should have access to:

- presentation software
- videos
- a flip chart
- interactive demonstrations
- notes
- computer
- work products

The presentation will be conducted as follows:

- The presentation will take place on a one-to-one basis between the ICB independent assessor and the apprentice
- The way in which the content of the presentation is delivered is not prescriptive
- The apprentice must outline details of visual aids to be used and specify any equipment required when given notice of the presentation by ICB

The apprentice's training provider will book the Presentation and Questioning session with ICB on behalf of the apprentice at a time suitable for both the apprentice and the independent assessor. ICB will give the apprentice a minimum of 10 days' notice of the session date and time.

The Presentation and Questioning session will be conducted using an online video meeting platform such as Teams or Zoom. A meeting invite for the session will be sent to the apprentice at least 10 days prior to the date of the session.

The Independent Assessor will review the Project Report prior to the Presentation and Questioning session taking place and will prepare the questions for the session. Apprentices will be required to answer questions based on their Project Report.

The session will last for 40 minutes. This includes a presentation lasting typically 20 minutes and questioning lasting typically 20 minutes. The Independent Assessor can increase the time of the session by up to 10%. This time is to allow the apprentice to complete their last point. The Independent Assessor will ask a minimum of 4 questions at the end of the presentation and may ask follow-up questions to seek clarification. The apprentice may have access to their Project Report during the Presentation and Questioning session and may refer to it during the session.

The Independent Assessor will record the session using the online platform's recording facility. During the session the Independent Assessor will make written notes of the apprentice's answers to questions and the KSBs demonstrated.

The apprentice will need to show the Independent Assessor valid photo ID before the session takes place.

Assessment location

The Presentation and Questioning session must take place in a suitable venue, for example the training provider's or employer's premises. The session should take place in a quiet room, free from distractions and influence.

Order of Assessments

The assessment methods can be delivered in any order. The result of one assessment method does not need to be known before starting the next.

Grading

Multiple-choice Test

Grade	Minimum Marks Required	Maximum Marks Required
Fail	0	34
Pass	35	41
Distinction	42	50

The below tables provide the KSBs being assessed in the Professional Discussion and the Project Report assessment methods along with the grading criteria for a Pass grade, and where relevant, a Distinction grade.

Professional Discussion underpinned by Portfolio

Fail - does not meet pass criteria

KSBs	PASS Apprentices must demonstrate all the pass descriptors	DISTINCTION Apprentices must demonstrate all of the pass descriptors and all of the distinction descriptors
K2 K7 K9 K10 K12 K18 K19 K20 K25 K26 K28 K30 S2 S3 S6 S7 S10 S11 S12 S13 S14 S15 B1 B3 B6	<p>Explains how business change can impact on the lifecycle of an organisation's payroll. (K7)</p> <p>Explains how they identify and apply different methods of communication, selecting technical and/or non-technical language to different types of internal and external audience to communicate complex payroll concepts. (K10, S3)</p> <p>Analyses how they negotiate with, influence and manage relationships with the provider/ customer and other stakeholders to achieve desired and successful payroll outcomes. (K9, S2)</p> <p>Explains how they establish an approach to representing payroll issues which follows the guidelines on integrity and professionalism as set out by the ethical code of conduct for the sector/ organisation. (B1)</p>	<p>Contrasts different communication methods and is able to justify their chosen approach (K10, S3)</p>

	<p>Explains the impact of the organisational mission, objectives and values have on successful payroll delivery and how this is measured by key performance indicators. (K2)</p> <p>Evaluates how they reflect on their own effectiveness and explains how they assume responsibility for their personal development by seeking out professional development to enhance performance. Explains how they share expertise/learning gained to build the capability of colleagues within their team. (B6, K28)</p> <p>Explains when they identified their own actions were impacting others and the steps they took to ensure the needs of others were met (B3)</p> <p>Explains how they identify the main data sources that can impact a complex payroll decision and explains the process they follow for sourcing data (K12)</p> <p>Analyses how the overall payroll process can be at risk from fraud and other criminal activity, and explains the main steps for mitigating this risk (K30)</p> <p>Explains how advances in technology and software impact the UK-wide payroll function and compares the benefits and risks of cloud-based and integrated HR /payroll solutions. Explains how they balance the trade-offs between automated and non-automated payroll approaches and how they identify and complete payroll calculation manually where needed (K18, S6)</p> <p>Explains the steps they follow that ensures accuracy when reconciling a final payroll run (S15)</p> <p>Explains how they allocate payroll work, balancing targets, workload, risks, and priorities with available resource and team strengths to meet key performance indicators and contractual obligations. Evaluates how they manage and motivate diverse teams to meet client/customer payroll requirements (K19, S7, S10, S14)</p> <p>Explains how they make staffing decisions or recommendations by analysing the predicted payroll workload against current resources. Explains how payroll delivery can be impacted by the different types of organisational recruitment models (K25, K26, S13)</p> <p>Explains how they quality assure their own and their team's payroll calculations to ensure accuracy and compliance. Explains how they ensure that they and their team act compliantly when transacting customer</p>	<p>Evaluates the impact on successful payroll delivery of not having clearly defined organisational mission, objectives and values (K2)</p> <p>Analyses the impact of the expertise or learning gained and evaluates the impact this has had on the team capability. (B6, K28)</p> <p>Critically evaluates the allocation process and is able to identify potential improvements within their current work practice. (K19, S7, S10, S15)</p>
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	<p>payroll by deploying a quality assurance process proportionate to the payroll issues (S12)</p> <p>Explains the process they would follow to interpret all payroll legislation, guidance and case law pertinent to a complex case (S11)</p> <p>Explains how payroll, employment and pensions legislation and guidance is created across each of the devolved nations that form the UK and how to distinguish between primary and secondary legislation and how primary legislation and regulations work together (K20)</p>	<p>valuates the risks involved in maintaining payroll across devolved nations that form the UK (K20)</p>
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Project Report with Presentation and Questioning

Fail - does not meet pass criteria

KSBs	PASS Apprentices must demonstrate all the pass descriptors	DISTINCTION Apprentices must demonstrate all of the pass descriptors and all of the distinction descriptors
<p>K1 K3 K21 K22 K23 K24 K29</p> <p>S1 S8 S9</p> <p>B2 B4 B5</p>	<p>Demonstrates how their analysis of a payroll process or model has identified risks and opportunities for improvement. Justifies how their recommendations could bring payroll benefits (K11, K29, S1)</p> <p>Explains how they ensured their project adhered to data protection legislation and explains the steps they implemented within the project to ensure processes for safely and legally storing and sharing information and procedures are compliant with this legislation (K23)</p> <p>Demonstrates how they have ensured that their project has utilised available technological platforms when delivering payroll operations by balancing the benefits and risks of the system used (S9)</p> <p>Explains how a range of payroll quality assurance approaches can be utilised to determine the accuracy of calculations within the processes and procedures in the project (K24)</p> <p>Demonstrates how they have used questioning effectively in order to seek solutions and how they have anticipated problems and managed setbacks when they occur (B4, B5)</p> <p>Designs, implements and maintains payroll administrative procedures and guidance that enables payroll team delivery including technical data, and both</p>	<p>Evaluates the analysis process and identifies improvements in the process for future project work (K1, K29, S1)</p> <p>Analyses benefits and risks of the systems used to recommend further technological improvements and efficiencies (S9)</p> <p>Critically evaluates the quality assurance approaches that were considered and justifies the final approach that was selected (K24)</p>

	<p>business as usual and contingency (disaster recovery) handling, while adapting to changing work priorities and deadlines (K3, S8, B2)</p> <p>Explains how they keep up to date with payroll legislation, guidance and caselaw that may potentially affect any part of payroll operations, and explains how caselaw is formed and evaluates how it impacts on legislation and guidance (K21, K22)</p>	<p>Evaluates potential changes in payroll legislation, guidance or caselaw and how these may impact the project outcomes (K21, K22)</p>
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The grades available for each assessment method are below.

Assessment method 1 – Multiple-choice Test:

- fail (0 – 69%)
- pass (70 – 83%)
- distinction (84 - 100%)

Assessment method 2 – Professional Discussion underpinned by Portfolio:

- fail
- pass
- distinction

Assessment method 3 – Project Report and Q&A session:

- fail
- pass
- distinction

The result from each assessment method is combined to decide the overall apprenticeship grade.

The following grades are available for the apprenticeship:

- fail
- pass
- distinction

The Multiple-choice Test is computer marked and graded.

The ICB independent assessor will grade the Professional Discussion and Project Report assessment methods in line with the EPA Assessment plan grading criteria.

ICB will combine the individual assessment method grades to determine the overall EPA grade.

If the apprentice fails one assessment method or more, they will be awarded an overall fail.

To achieve an overall pass, the apprentice must gain a pass in one method plus a pass or higher in other methods. To achieve an overall 'distinction' the apprentice must achieve a distinction in all three assessment methods.

Grades from individual assessment methods will be combined in the following way to determine the grade of the EPA overall.

Multiple-choice Test	Professional Discussion underpinned by Portfolio	Project Report and P&Q session	Overall Grading
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Distinction	Pass	Pass
Pass	Distinction	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Distinction	Distinction

*Any grade = fail, pass, distinction

Results

The Multiple-choice Test result will be released within 2 working days of the test being taken. This is to allow for the remote invigilation recording to be reviewed.

The outcome of the Professional Discussion will be released within 20 working days of the discussion taking place. This is to allow for any standardisation of marking.

The outcome of the Project Report and Presentation and Questioning session will be released within 20 working days of the session taking place. This is to allow for any standardisation of marking.

To pass the overall apprenticeship, the apprentice must achieve at least a pass in all three assessments.

Re-sits and re-takes

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.

A re-sit does not need further learning, whereas a re-take does. The apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

The employer should agree the timescale for a re-sit or re-take. A re-sit is typically taken within 3 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 4 months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a 10-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 Distinction if they need to re-sit or re-take one or more assessment methods, unless the EPAO determines there are exceptional circumstances.

Further Information & guidance

This specification should be read in conjunction with the [Level 5 Payroll Assistant Manager Standard](#) and the [Level 5 Payroll Assistant Manager Assessment Plan](#)

To support employers, training providers and apprentices prior to Gateway, ICB has produced guidance documents/handbooks and sample assessments. Mock assessments delivered via the ICB's e-assessment platform are also available to apprentices once they have progressed through Gateway.

Please contact ICB at apprenticeships@bookkeepers.org.uk for details.

Equality, Diversity and Inclusion Policy

ICB is committed to ensuring fair and equal access to our qualifications, assessments, support materials and all other services. ICB strives to maintain professional standards for the benefit of all our apprentices, students, members, suppliers, stakeholders and ICB staff.

Please refer to the ICB website for a copy of our Equality, Diversity and Inclusion policy.

Reasonable Adjustments & Special Considerations Policy and Procedure

ICB is keen to provide a fair and consistent assessment process for all. ICB recognises that there are sometimes circumstances beyond the control of the apprentice that may have an impact on their level of ability whilst undertaking assessment. ICB will consider all appropriate Reasonable Adjustments and Special Consideration requests.

Please refer to the ICB website for a copy of our Reasonable Adjustment and Special Considerations policy.

Enquiries & Appeals Policies

ICB is continually working to uphold a high level of service by ensuring quality assurance standards are maintained at all times. ICB aims to ensure that all assessment outcomes are fair, consistent and reliable. However, occasions may arise where a student may wish to question a decision.

Please refer to the ICB website for a copy of our Enquiries and Appeals policies.



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+44(0)20 3405 4000

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