



## Draft Preview

# DRAFT APPRENTICESHIP ASSESSMENT PLAN FOR THE ACCOUNTS OR FINANCE ASSISTANT APPRENTICESHIP

ST0608/V2

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS APPRENTICESHIP	INTEGRATION
ST0608	2	Mandatory qualification

## Assessment Plan

### Assessment details

#### Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the Level 2 accounts or finance assistant apprenticeship. It should be read in conjunction with the General Requirements for Apprenticeship Assessment. Where there is conflict between this AAP and the General Requirements, this AAP takes precedence. Assessment organisations must also comply with the relevant regulatory framework for apprenticeship assessment.

It is important that the assessment of apprentices is proportionate, valid, and provides reliable evidence of an apprentice's attainment of the relevant knowledge and skills. As such, assessment organisations must design assessments to ensure:

- employers have confidence that the apprentice has reached the expected performance standard
- apprentices are sufficiently secure in their knowledge and skills, so that they could demonstrate their competence in different contexts (for example, a different workplace)

#### Assessment Outcomes

The assessment outcomes group and summarise the knowledge and skills that must be demonstrated in assessments. All assessment outcomes must be assessed.

The assessment outcomes have been created to summarise the content that is not fully assessed by the qualifications mandated in the occupational standard. The knowledge and skills statements that are not mapped here are assessed by the qualifications mandated in the occupational standard.

Knowledge and skills statements in **bold** are mandatory and must be assessed in every version of the assessment that is made available.

Assessment Outcome	Mapping
<p><b>AO1: Legal, ethical and sustainability requirements in accounting</b></p> <p>Demonstrates understanding of the legal, commercial, ethical and sustainability factors that influence accounting activities, including relevant areas of English law, commercial context, corporate social responsibility principles and environmental considerations.</p>	<p><b>K1</b>, K7, K11, K16</p>
<p><b>AO2: Financial data processing and accounting tasks</b></p> <p>Uses accounting systems to record and manage financial information, applying principles of cost recording, transaction timing, and the differences between financial and management accounting, while planning and completing routine accounting tasks and maintaining secure data handling practices.</p>	<p><b>K9*</b>, K10, <b>K13*</b></p> <p><b>S4*</b>, <b>S6*</b>, S7</p>
<p><b>AO3: Communication and stakeholder engagement</b></p> <p>Communicates financial information clearly and appropriately to different stakeholders, selecting suitable language and media, and demonstrating awareness of diversity, inclusion and cultural considerations.</p>	<p><b>K15*</b>, <b>S5*</b></p>

(\*) Knowledge and skills statements which offer opportunities to develop functional English and maths are identified with an asterisk.

### **Assessment requirements**

Assessment organisations must set apprenticeship assessments. Assessment organisations should consider how technology and digital tools can support innovation and efficiency.

Assessment organisations must design apprenticeship assessments to include at least one **professional discussion**.

Any additional assessment(s) must be selected from the following list of methods to ensure the assessment outcomes are met in full:

- **interview**
- **presentation**
- **observation**
- **question and answer**

Apprentices may be assessed at any appropriate point during their apprenticeship programme.

Assessments may be designed to allow a centre or training provider to mark assessments. The assessment organisation is responsible for ensuring all assessments are sufficiently reliable and valid, and for the accuracy of any centre or training provider marking.

### **Performance descriptors**

Performance descriptors describe the level of performance required to achieve a pass or distinction grade. Assessment organisations must design assessments that align with these descriptions.

Performance Category	Pass	Distinction
<b>Applied Knowledge</b>	Demonstrates appropriate application of accounting or finance knowledge, facts, procedures, and ideas to complete well-defined tasks and solve straightforward problems across routine and some varied work activities.	Demonstrates accurate, insightful, and efficient application of accounting or finance knowledge, facts, procedures, and ideas to solve straightforward problems and adapt effectively to well-defined tasks.
<b>Applied Skills</b>	Selects and uses cognitive and practical accounting or finance skills to complete mostly routine tasks, as directed, with consistency and purpose.	Combines cognitive and practical accounting or finance skills to complete mostly routine tasks, as directed, with precision, even when faced with subtle complexities or shifting requirements.
<b>Regulatory and Procedural Awareness</b>	Follows accounting or finance-related guidance accurately, and within the requirements of the role.	Confidently and accurately follows accounting or finance-related guidance within the requirements of their role, while also considering the wider impacts of that guidance.
<b>Communication and Collaboration</b>	Communicates and collaborates effectively within a team or group setting, demonstrating reliable service delivery and teamwork skills when required.	Consistently communicates with clarity and sensitivity, showing strong awareness of others and responding resourcefully in team and service delivery scenarios.

<b>Information Use and Decision Making</b>	Collects and analyses relevant accounting or financial information to support suitable decisions and actions that are fit for purpose in the work context.	Collects and analyses relevant accounting or financial information and acts on feedback to ensure actions have a clear purpose and add value in terms of efficiency or outcomes.
<b>Responsibility and Autonomy</b>	Takes responsibility for completing assigned accounting or finance tasks, demonstrating autonomy within familiar situations.	Exercises informed judgement and self-direction, often anticipating the needs of the accounting or finance task or team.

### **Professional recognition**

This apprenticeship aligns with the professional body recognition detailed in the occupational standard.

Please contact the relevant professional body for further information.

### **Additional qualification**

One of the qualifications detailed in the occupational standard must be completed before the end of the apprenticeship.

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