

ST0602 Level 4 Revenues and welfare benefits specialist

Assessment Plan

Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the Level 4 Revenues and welfare benefits specialist 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.

Assessment organisations must ensure all the core assessment outcomes and the assessment outcomes for one of the following options are assessed for each apprentice:

- Option 1: Revenues Specialist
- Option 2: Welfare Benefits Specialist

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

Core Assessment Outcome	Mapping
<p>AO1: Customer Service and Communication</p> <p>Uses appropriate communication methods to engage with diverse customers, identify vulnerability, manage sensitive or challenging interactions, and support customers through advice, by signposting or referral, and provide dispute or appeal information.</p>	<p>K3, K4, K5, K6, K7, K8 S1, S2, S3, S4</p>
<p>AO2: Information, Evidence and Decision Support</p> <p>Obtains, analyses and validates information and evidence from relevant sources, determining completeness and accuracy to support decision making while maintaining secure and compliant handling of personal data.</p>	<p>K1, K2, K10 S6, S7</p>
<p>AO3: Digital, Data and Technology Use</p> <p>Uses organisational digital systems, information tools and AI-enabled technologies to complete tasks, maintain accurate and secure records, and apply safe, responsible and compliant digital working practices.</p>	<p>K11, K19, K20 S8, S15</p>
<p>AO4: Collaborative Working and Service Contribution</p> <p>Develops and maintains effective relationships with internal and external stakeholders, seeks support or guidance where appropriate, and contributes to organisational performance targets and service improvement activities.</p>	<p>K9, K12, K13, K14 S5, S9, S10, S11</p>
<p>AO5: Professional Practice, Compliance and Sustainability</p> <p>Applies organisational policies and legislative requirements relating to equality, diversity and inclusion, health and safety, data protection and sustainability, and undertakes professional development aligned with agreed objectives.</p>	<p>K15, K16, K17, K18 S12, S13, S14, S16</p>

Option 1: Revenues Specialist	Mapping
<p>AO6: Local Taxation Liabilities and Entitlements</p> <p>Determines local taxation liabilities and applies exemptions, discounts and reliefs in line with relevant legislation organisational policies and procedures.</p>	<p>K21, K22, K23</p> <p>S17, S18</p>
<p>AO7: Local Taxation Billing, Payments and Charges</p> <p>Administers local taxation billing, reminders and additional charges, and arranges payment methods or instalment plans in accordance with legislation, policies and procedural requirements.</p>	<p>K24, K25</p> <p>S19, S20</p>
<p>AO8: Debt Recovery and Enforcement</p> <p>Negotiates payment arrangements and undertakes recovery and enforcement actions, applying legislation, policy and procedural requirements to progress outstanding debts and achieve appropriate outcomes.</p>	<p>K26</p> <p>S21, S22</p>
Option 2: Welfare Benefits Specialist	Mapping
<p>AO9: Benefit Eligibility and Entitlement Determination</p> <p>Evaluates customer circumstances to determine eligibility for benefits or reductions, establish commencement dates and exclusions, and apply rules relating to effective dates and changes in circumstances.</p>	<p>K27</p> <p>S23, S24</p>
<p>AO10: Benefit Calculation and Household Assessment</p> <p>Assesses income, capital, household composition, rent and council tax information to calculate initial entitlement of benefits or reductions and the impact of changes in circumstances in accordance with legislation, policies and organisational procedures.</p>	<p>K28, K29, K30, K31, K32</p> <p>S25, S26, S27, S28</p>

<p>AO11: Payments and Overpayment Management</p> <p>Establishes correct payments or transfers and takes appropriate action on overpayments, including determining recoverability and identifying the responsible party in line with legislation and policy.</p>	<p>K33, K34</p> <p>S29, S30</p>
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(*) 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 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:

- **Observation**
- **Additional Professional discussion**
- **Question and answer**
- **Presentation**
- **Multiple-choice test**
- **Portfolio**
- **Showcase**

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
Applied Knowledge	Demonstrates sound application of occupational knowledge to address well-defined but complex and non-routine problems, reaching appropriate and generally effective outcomes within organisational or sector expectations.	Applies occupational knowledge with confidence and precision, consistently producing high-quality outputs in response to well-defined but complex and non-routine problems, with solutions that are appropriate and often enhance outcomes or processes.
Applied Skills	Identifies and applies suitable cognitive and practical skills to complete work activities in the revenues or welfare benefits context, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet organisational or sector expectations.	Adapts and applies cognitive and practical skills with a high degree of flexibility and operational fluency in the revenues or welfare benefits context, ensuring methods are effective and optimised for quality and efficiency of service outcomes.
Regulatory and Procedural Awareness	Applies relevant legislation, regulation and organisational procedures with sound judgement, adapting appropriately to varied and occasionally complex situations in revenues or welfare benefits work.	Interprets and applies regulatory and procedural requirements with insight and appropriate flexibility, identifying implications and making informed decisions in varied and occasionally complex situations in revenues or welfare benefits work.
Communication and Collaboration	Communicates clearly and collaborates effectively with colleagues and stakeholders, contributing to a responsive customer service culture while supporting effective service delivery across	Communicates and collaborates with confidence and insight, tailoring approach to meet diverse stakeholder needs, leading on responsive customer service cultures and contributing to improved collaboration

	revenues or welfare benefits activities.	and service outcomes across revenues or welfare benefits activities.
Information Use and Decision Making	Analyses and interprets relevant information to make informed decisions, showing clear awareness of the occupational context and the broader scope of revenues or welfare benefits work.	Analyses, interprets and evaluates information from a range of sources, providing insightful justification for decisions and demonstrating strong awareness of broader implications within the revenues or welfare benefits occupational area.
Responsibility and Autonomy	Takes responsibility for actions and decisions within set parameters. Manages own work and, where relevant, allocates tasks or supports others with adequate awareness of risks and priorities in revenues or welfare benefits activities.	Proactively takes responsibility for actions and decisions within set parameters. Manages own work and the coordination of others, independently using sound judgment about risks and priorities to manage resources or actions in revenues or welfare benefits activities.