



Draft Preview

DRAFT APPRENTICESHIP ASSESSMENT PLAN FOR THE ASSISTANT ACCOUNTANT APPRENTICESHIP

ST0002/V2

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS APPRENTICESHIP	INTEGRATION
ST0002	3	Mandatory qualification with apprenticeship assessment

Assessment Plan

Assessment details

Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the level 3 assistant accountant 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 qualification or qualifications mandated in the occupational standard. The qualification or qualifications assess the knowledge and skills statements that are not mapped here.

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

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

Assessment Outcome	Mapping
<p>AO1: Digital financial processing and information management</p> <p>Uses digital accounting packages, spreadsheets, and databases to process and maintain financial information, applying digital skills to generate, interpret, and present financial data effectively.</p>	<p>K6*</p> <p>S9*</p>
<p>AO2: Financial controls, cyber security and data protection</p> <p>Applies principles of financial control, cyber-security, and data protection to identify vulnerabilities, safeguard information, and ensure financial data is processed in line with organisational and legislative requirements.</p>	<p>K4*, K7, K8*</p> <p>S10*</p>
<p>AO3: Financial communication and stakeholder collaboration</p> <p>Communicates financial information clearly to diverse stakeholders, presenting information in accessible ways, selecting appropriate communication methods, and maintaining effective working relationships while considering inclusion, cultural awareness, and digital-communication risks.</p>	<p>K9</p> <p>S7*, S8*, S11*</p>
<p>AO4: Professional finance environment and sector awareness</p> <p>Demonstrates understanding of how the finance function supports organisational strategy, alongside awareness of the professional landscape, including regulators, technological change, and expectations for maintaining up-to-date professional knowledge.</p>	<p>K10, K11</p>

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 a **professional discussion**.

Any additional assessment, or assessments, must be selected from the following list of methods, to ensure the assessment outcomes are met in full. Assessments available in the list may be used more than once:

- **portfolio**
- **written assessment**
- **presentation**
- **question and answer**
- **interview**
- **observation**

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 accounting knowledge, facts, procedures, and ideas across routine and non-routine tasks, completing them to an acceptable standard within familiar but sometimes complex financial work contexts.	Applies a thorough understanding of accounting knowledge, facts, procedures, and ideas to manage and resolve routine and non-routine tasks with discernment and skill in familiar but sometimes complex financial work contexts.
Applied Skills	Identifies and applies appropriate accounting skills, methods, and procedures to complete tasks and address challenges with a reasonable degree of autonomy and effectiveness across routine and non-routine work.	Selects and integrates appropriate accounting skills, methods, and procedures proactively and resourcefully to complete tasks and address challenges effectively and with minimal oversight across routine and non-routine work.
Regulatory and Procedural Awareness	Applies relevant financial legislation, regulation, and organisational procedures without error, showing some depth of insight and adaptability when working within familiar but sometimes complex financial contexts.	Demonstrates refined judgement in interpreting financial legislation, regulation, and organisational procedures, confidently navigating nuanced issues in practice within familiar but sometimes complex financial contexts.
Communication and Collaboration	Participates effectively in finance team environments and communicates financial information clearly to support service delivery, adapting communication	Communicates persuasively and adapts confidently to different audiences and team dynamics, taking initiative in presenting financial information and

	appropriately within familiar but sometimes complex stakeholder interactions.	contributing positively to stakeholder interactions within familiar but sometimes complex contexts.
Information Use and Decision Making	Accurately interprets and evaluates relevant financial information from a variety of sources to support problem-solving in mostly familiar but sometimes complex work contexts, drawing conclusions that meet task requirements.	Evaluates diverse and sometimes conflicting financial information sources with insight, drawing informed conclusions that improve task outcomes or efficiency in mostly familiar but sometimes complex work contexts.
Responsibility and Autonomy	Takes responsibility for initiating and completing financial tasks within set parameters and, where relevant, contributes to guiding or supporting others with a reasonable degree of autonomy.	Pre-emptes the need for financial tasks to be initiated within set parameters, demonstrating accountability and responsiveness to emerging priorities or risks, and leading others to achieve team outcomes with minimal oversight.

Professional recognition

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

Additional qualification

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

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