



# END-POINT ASSESSMENT HANDBOOK V1.3

For Apprentices & Training Providers

VERSION CONTROL

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## VERSION CONTROL

| <b><u>CMI End-Point Assessment Handbook</u></b>            |   |
|--|---|
| Applies to   | CMI Apprenticeship Centres & CMI Apprenticeship Learners.   |
| Effective from and replaces all previous versions prior to | June 2026   |
| Owned by   | EPA Department.   |
| Reviewed and monitored by                                  | Head of EPA, Senior Service Delivery Manager , Senior Assessment Delivery Manager and EPA Support Manager |
| Review Frequency   | Quarterly   |

This is Version 1.3 of the Chartered Management Institute (CMI) End-Point Assessment Handbook and replaces all previous versions. Centres must ensure that all staff involved in the delivery, support, and preparation of apprentices for CMI End-Point Assessment are fully familiar with the contents of this handbook and adhere to the requirements outlined within it.

This document is subject to revision and is maintained electronically. Electronic copies are version-controlled. Printed copies are not subject to this control. Users are advised to refer to the CMI website for the most up-to-date version.

## INTRODUCTION & QUICK LINKS

This handbook details the operational processes for Training Providers and Apprentices involved in the Chartered Management Institute's (CMI) End-Point Assessment (EPA). The key focus is on the operation of CMI's systems to ensure apprentices are prepared, booked for their Live Assessments, and supported throughout their journey. It is designed to provide clear guidance and practical support to both training providers and apprentices, helping to navigate the EPA process effectively and progress confidently towards successful end-point assessment completion.

**Note:** This document is subject to change. Any updates will be communicated via email, and any changes to the End-Point Assessment (EPA) process will be shared through EPA Bulletins and the EPA Newsletter.

### Essential Resources

Looking for specific timelines, KSBs, or grading rules for your standard? Please refer to the apprenticeship assessment plans published by Skills England. These can be found on the Skills England website: [Skills England](#).

We are also here to support and guide you throughout the process should you need any further assistance. Please check the Apprenticeship Assessment Plans Directory on [page 6](#) for direct links to your standard.

| Resource                        | Description   | Access Type           |
|---------------------------------|---|-----------------------|
| <a href="#">CMI Assess</a>      | CMI's dedicated EPA platform, used to manage Gateways, book Live Assessments, and access deadlines/results. Upload presentation/SBP & Mapping document.                         | <i>Login Required</i> |
| <a href="#">Partner Connect</a> | CMI's Partner management platform and the definitive system of record for registrations.  | <i>Login Required</i> |
| <a href="#">EPA Toolkit</a>     | A comprehensive resource library providing templates, advice, and essential information to prepare for EPA. Please note: Only available to Training providers who can share the | <i>Login Required</i> |

|                                     |   |                       |
|-------------------------------------|---|-----------------------|
|                                     | resources with apprentices.   |                       |
| <a href="#">The CMI's Policies</a>  | Publicly accessible policies covering CMI's EPA requirements.   | Publicly Available    |
| <a href="#">The CMI Website</a>     | Publicly accessible resource covering general information, news, and updates relevant to CMI membership, qualifications and EPA.  | Publicly Available    |
| <a href="#">EPA Support</a>         | A dedicated support hub for training providers offers comprehensive guidance on the apprenticeship journey and EPA preparation. Resources include Start with the End in Mind support sessions, links to the EPA Toolkit, EPA Newsletters, drop-in sessions and webinars. You will also be able to book a live assessment with the link directly to CMI Assess and access our EPA trend reports. | <i>Login Required</i> |
| <a href="#">The CMI's EPA Offer</a> | CMI is a leading EPAO for management and leadership apprenticeships. This resource for Training Providers highlights partnership benefits, programme support, and the comprehensive EPA process to enhance apprentice outcomes.   | Publicly Available    |
| <a href="#">Skills England</a>      | Resources for managing education, apprenticeship, and training funding in England.  | Publicly Available    |
| <a href="#">Ofqual</a>              | Resources for understanding the regulatory landscape and EPA qualification processes.   | Publicly Available    |

|                     |  |                    |
|---------------------|--|--------------------|
| <a href="#">OfS</a> | Independent regulator of higher education in England, providing resources on student rights and support. | Publicly Available |
|---------------------|--|--------------------|

## Apprenticeship Assessment Plans

| Apprenticeship Standard   | Abbrev.       | Active Versions | Official Assessment Plan   |
|---|---------------|-----------------|--|
| Level 3 Business Administrator  | BA            | v1.0            | <a href="#">L3 BA Assessment Plan</a>  |
| Level 3 Team Leader / Supervisor  | TLS / TL      | v1.2, v1.4      | <a href="#">L3 TLS Assessment plan v1.2</a><br><a href="#">L3 Team Leader Assessment plan v1.4</a> |
| Level 4 Associate Project Manager   | APM           | v1.4, v1.5      | <a href="#">L4 APM Assessment Plan</a>   |
| Level 4 Junior Management Consultation/<br>Level 4 Associate Management Consultant Apprenticeship | JMCA/<br>AMCA | v1.1            | <a href="#">L4 JMCA Assessment Plan</a><br><br>AMCA assessment plan - TBC                          |
| Level 5 Operations / Dept. Manager  | ODM           | v1.2            | <a href="#">L5 ODM Assessment Plan v1.2</a>  |
| Level 5 Operations / Dept. Manager  | OM            | v1.4            | <a href="#">L5 OM Assessment Plan v1.4</a>   |
| Level 6 Chartered Manager Degree  | CMDA          | v1.1            | <a href="#">L6 CMDA Assessment Plan</a>  |

|                            |     |            |  |
|----------------------------|-----|------------|--|
| Level 6 Improvement Leader | IL  | v1.0       | <a href="#">L6 IL Assessment Plan</a>  |
| Level 7 Senior Leader      | SLA | v1.1, v1.2 | <a href="#">L7 SLA Assessment Plan</a> |

## Support Signposting - For Training Providers -

To ensure your queries are resolved as quickly as possible, it is vital to contact the correct department.

### Partner Connect Help

Partner Connect is the definitive system of record for all learner information, and all updates must be made directly within Partner Connect. Changes made in Partner Connect are transferred to CMI Assess within 2 working days. Please allow this time before contacting the EPA Team to request updates in CMI Assess.

For assistance with Partner Connect — including registrations, withdrawals, and data synchronisations — you'll find extensive guidance available through the [Partner Connect Help Centre](#). The Help Centre provides step-by-step instructions covering the processes and functionality available within Partner Connect, helping you quickly find the support and guidance you need.

If your issue cannot be resolved via the Help Centre, or if an apprentice is registered but not showing on CMI Assess after 2 working days, please contact the Partner Services Team by submitting this [enquiry form](#), submitting an Enquiry Form in Partner Connect or contacting the team by email: [qualifications@managers.org.uk](mailto:qualifications@managers.org.uk).

### Compliance & Policy Rules

The following EPA policies and procedures are available for all training providers: Incident Reporting Procedure, Safeguarding Policy, Conflicts of Interest Policy, Malpractice and Maladministration Policy, Complaints Procedure, Reasonable Adjustment and Special Consideration Policy, Invigilation Instructions, Enquiries and Appeals Policy, Enquiries and Appeals Policy Forms, Confidential & Commercially Sensitive Evidence Documents, and the Prevent Agenda Policy.

Please click on this link for all CMI Policies [CMI Policies](#)

CMI will expect all communications to be managed through the Programme Director at the approved Centre. The only exception to this is the CMI Whistle-blowing policy.

### EPA Toolkit

The End Point Assessment (EPA) toolkit aims to provide end-to-end apprentice support for training providers, covering all aspects of the apprenticeship journey from programme design and delivery through to end-point assessment and certification. [EPA Toolkit](#)

**Apprentices:** The EPA Toolkit is intended for use by training providers to support apprenticeship delivery. Please note that apprentices do not have access to this resource.

## GETTING STARTED: CMI Partner Connect

Please note: To ensure visibility of apprentices on CMI Assess, all apprentices must first be registered on CMI Partner Connect (CPC).

### For Training Providers

Setting up access and adding users in Partner Connect ensures that users are correctly registered with the appropriate permissions to access and use the system effectively.

[Getting started on Partner Connect](#)

When setting up a user on Partner Connect, you have the option to select whether you want to access the Apprenticeship Assessment System under the tab "System Access". This information will be passed to the EPA team. Each user will be added to CMI Assess and you will be emailed your login details.

Registering Learners - You must register all apprentices via Partner Connect as soon as possible, ensuring they are enrolled on the correct version of the appropriate standard to avoid any unnecessary delays. Guidance notes on how to do this can be found on the Help Centre. [Learner Registrations](#)

Partner Connect - Help Centre: <https://www.managers.org.uk/mycmi/help-centre/p/partner-connect/>

### Data Sync

Once registered in Partner Connect, allow **2 working days** for the data to transfer and create the apprentice's profile in CMI Assess. Regularly review your apprentice list to verify registration details and ensure names match the Department for Education (DfE) Individual Learning Record (ILR) exactly.

If you require further assistance, please do not hesitate to contact us via our enquiry form: [Contact CMI](#)

### Running Reports

Training Providers can access a comprehensive range of reports to track apprentice progress. Simply navigate to the pink ribbon situated at the top of the CMI Assess page. Available reports include:

- Live Assessment Date Booking Report
- Completed Knowledge Tests Report
- Completed Apprentices Report
- Mock Knowledge Tests Report

- Key Dates Report
- Standard Process Progress Reports

Here is a short video demonstrating how to access CMI reports, which you may find useful- [CMI Assess Reports Video](#)

### For Apprentices

## When to Log In

You will receive an automated email instructing you to log in to CMI Assess **only after** your Gateway has been officially approved by CMI.

## Setting Your Password

You do not need to wait for a password to be sent to you. Once you receive your login instruction email, use the password request feature on the CMI Assess login page to set or reset your password. If this link is not working or you are struggling to log in, contact [epa@managers.org.uk](mailto:epa@managers.org.uk).

## MANAGING LEARNER STATUS & BREAKS IN LEARNING -

**For Training Providers - Crucial Reminder:** Partner Connect is the definitive system for all formal withdrawals and re-registrations. You must update Partner Connect to reflect the learner's current status. Please find a link to the Help Centre for extra support - [CPC Help Centre](#)

### Deactivating a Learner

If an apprentice is formally withdrawing, ensure they are removed from Partner Connect first. The learner will be withdrawn from CMI Assess within 48 hours.

### Reactivating a Learner

How you reactivate an apprentice depends on how they left:

#### Formally Withdrawn

You cannot reactivate them in CMI Assess. You must **re-register** the apprentice via Partner Connect. Allow 2 working days for the data to sync to create their active profile.

#### Marked Inactive (e.g., Break in Learning)

If they were only marked inactive in CMI Assess but remained registered on Partner Connect, please inform the EPA Team to move the apprentice back to an active state.

## Managing a Break in Learning (BIL)

To ensure compliance and protect the apprentice's assessment validity, Training Providers must officially notify the Awarding Body via Partner Connect at two points: at the **start** of the break, and when the apprentice **resumes**.

*Note: The Awarding Body internally notifies the EPA team; you do not need to email us directly.*

### Date Management Rules for Resuming Apprentices

- **Please DO NOT** amend the apprentice's start date in CMI Assess.
- **DO** update the apprentice's end date in CMI Assess to reflect the extended timeline.
- For definitive guidance on ESFA funding compliance regarding BILs, please review the DfE's Apprenticeship Funding Rules. [DfE's Apprenticeship Funding Rules](#)

## THE GATEWAY PROCESS - For Training Providers

The Gateway is the final checkpoint before the Live Assessment. It is a joint declaration by the employer, supported by the Training Provider, that the apprentice is fully competent in their role and ready for the End-Point Assessment (EPA).

### Roles & Responsibilities

|                              |  |
|------------------------------|--|
| <b>The Apprentice</b>        | Provide all required evidence, such as your final portfolio & project proposal. If appropriate your Maths &/or English certificates to your Training Provider.   |
| <b>The Training Provider</b> | Input the end date in CPC during the registration process which will update the Expected Gateway date in CMI Assess. You must upload all evidence, complete all applicable prompts, and officially submit the Gateway. |
| <b>Joint Sign-Off</b>        | Before uploading, please ensure the apprentice, employer, and Training Provider have all signed the Gateway declaration to confirm that the required conditions have been met.   |

### Evidence Requirements & Upload Rules

#### Functional Skills (Maths & English)

CMI's policy on functional skills aligns strictly with the Department for Education (DfE) guidelines. We accept the approved exemptions list for Functional Skills published by the DfE. The full list of acceptable qualifications is available on the [government's website](#).

#### Standard Evidence

- Upload certificates, official transcripts, or the Personal Learner Record (PLR) report.
- Non-UK qualifications must be validated by [Ecctis](#).

#### Apprentices 19+

The Level 2 maths and English requirement may be waived by the employer if the apprentice was 19 or over when training commenced. However, if the apprentice is opting in for Level 2 maths and English, evidence of these qualifications must be [uploaded](#). Please note: - no evidence is required if the apprentice is post 19 years old and is not opting in.

## Portfolios & File Uploads

### Direct Uploads

Upload files directly to CMI Assess (up to approx. 150MB). Use standard file types (.doc, .pdf) and **do not** embed files within other documents, as they may not display correctly.

### E-Portfolios

If using an external portfolio, provide the URL, User ID, and Password in the "External Portfolio Info" section and note the URL on the Gateway page to ensure the IAA has access.

### File Drop

If your file exceeds 150MB and cannot be uploaded directly to the CMI Assess platform, please submit it using the following upload form: [CMI EPA Auxiliary Upload Form](#).

Please note: Files 150MB or smaller must still be uploaded through the CMI Assess platform. Any files within this size limit submitted via the alternative form will not be accepted and will need to be resubmitted through the correct platform.

### Submission, Deadlines, & Rejections - For Training Providers

Once all elements are complete and saved, the Training Provider must click **Submit** to send the Gateway for review.

#### The 15-Day Rule

Gateways must be submitted at least **15 working days** before the requested Live Assessment Date (LAD) to allow for a 5-day review period.

#### The 10-Day Rule

The Gateway must be fully approved at least **10 working days** before the Live Assessment Date.

**Warning Advisory:** CMI will automatically cancel booked live assessments (and apply cancellation fees) if an approved Gateway is not in place 10 working days prior. Please refer to the [CMI Partner Fees Guide](#) on our website for a full breakdown of associated charges.

## Rejections

If a Gateway is rejected, CMI will automatically email the Training Provider and the Apprentice. The specific reason for rejection will be detailed directly on the Gateway page.

## KNOWLEDGE TESTS - For Training Providers

If an apprenticeship standard includes a Knowledge Test, it will be completed and graded directly within CMI Assess. Mock tests are available on the apprentice's student page at any time to aid preparation.

### Booking & Moving a Test (Training Providers)

Tests can only be booked after the apprentice's Gateway has been fully approved.

#### To Book a Test:

1. Locate the apprentice on the CMI Assess home page and open their profile.
2. Click **Book Knowledge Test now**.
3. Enter the date and time.
4. Select the invigilator from the drop-down menu (employer) or "All TP users" box.
5. Click **Schedule Knowledge Test**. Confirmation emails will automatically be sent to the apprentice and the invigilator.

#### To Move a Test:

1. Navigate to the **Knowledge Test** section in the top pink ribbon.
2. Under "Schedule Knowledge Test," locate the apprentice, tick the box, and click **Clear Schedule Knowledge Test for Selected Apprentice**.
3. Rebook the test using the standard booking process above.

### Setting Up a New Invigilator - For Training Providers

#### Employer Invigilators

You can set up a new employer invigilator directly during the booking process. Click **Add Test Invigilator Account**, enter their details (Name, Email, Password), and click **Save Test Invigilator**. They will now appear in your drop-down menu.

#### Training Provider Invigilators

If the invigilator is a TP user:

1. Select "All TP Users."

2. Choose the relevant TP User.
3. This action assigns the selected user as the invigilator.
4. The invigilator must use their standard login credentials to unlock the test.

## On the Day: Unlocking & Taking the Test- For Training Providers

### Step 1: The Invigilator Unlocks the Test

The test will remain locked until the assigned invigilator grants access.

1. The invigilator logs into CMI Assess and locates the apprentice.
2. Ensure the correct standard is selected under *Knowledge Tests available for Invigilation*.
3. Perform an ID check and tick the box next to the apprentice's name.
4. Click **Unlock Knowledge Test for selected candidates**.
5. Confirm if the invigilation is in-person ("Yes") or remote ("No") and click **Continue**.

### Step 2: The Apprentice Takes the Test

1. Log in to your CMI Assess student page at the scheduled date and time. Please note, this won't be available to start until the exact time of the scheduled test.
2. Once the invigilator completes Step 1, the official link to the graded test will appear.
3. Complete the test. Your final grade will be displayed immediately upon submission.

## LIVE ASSESSMENTS: BOOKING & PREPARATION

All Live Assessments are conducted remotely via Google Meet. Due to high demand, Training Providers should submit booking requests by the **15th of every month** for the following month.

### The Booking Process - For Training Providers

#### Requesting a Date

You can request a date pre-Gateway via the apprentice's profile (under LAD Status), or during the Gateway submission itself.

#### Panel Members for L4 JMCA

L4 JMCA requires panel members; please send the full names and addresses of panel members to [epa@managers.org.uk](mailto:epa@managers.org.uk).

#### Confirmation

Booking requests are *not* guaranteed. The Customer Service Executive Team may contact the apprentice directly (copying the TP) to suggest alternative dates and finalise the booking. Once confirmed, an automated email with the Google Meet link will be sent to the apprentice's CMI Assess email.

### Changing a Booking & Deadlines - For Training Providers

#### To Request an Earlier Date

If extenuating circumstances have necessitated the change, this requires an approved Special Consideration form through CMI Partner Connect (CPC). The special consideration form is submitted by the TP to support the apprentice if something out of the apprentices control has happened and the LAD needs changes. For example an emergency / accident.

If no extenuating circumstances exist, submit the request using the Change to Live Assessment Date form. The Change to Live Assessment Date form is separate from the special consideration process and is used to request a change of LAD date - not to make a request which sits outside of the assessment plan requirements. [Change to Live Assessment date form](#)

#### To Request a Later Date

Cancel your existing booking and submit a new request via CMI Assess. Cancellation fees may apply for confirmed bookings. [CMI Partner Fees Guide](#)

WARNING on Deadlines: Changing a live assessment date using the change to the live assessment form does not automatically extend pre-live assessment upload dates for proposals and presentations. If the apprentice needs a change to part of the process, such as the upload deadline, which is a timeline stipulation in the assessment plan, the training provider will need to submit a special consideration via Partner Connect.

Missing these deadlines will result in a fail grade and cancellation fees. Please refer to the [CMI Partner Fees Guide](#) on our website for a full breakdown of associated charges.

### Cancellation Fees & Invoicing — the fee guidance includes:

- Unconfirmed Live Assessment Requests: Cancelling an unconfirmed Live Assessment Request incurs no charge.
- Confirmed Bookings: Cancelling a confirmed Live Assessment may incur a charge. Cancellations due to extenuating circumstances typically still incur a charge unless specified otherwise.

Please refer to the [CMI Partner Fees Guide](#) on our website for a full breakdown of associated charges.

### Preparing for the Assessment - For Training Providers & Apprentices

Apprentices should test Google Meet and practice screen sharing before the day.

### Requesting an Alternative Platform (Non-Google Meet)

CMI uses Google Meet as its licensed and secure delivery platform. Any requests to use an alternative platform should be emailed to [epa@managers.org.uk](mailto:epa@managers.org.uk) and arranged by the apprentice, training provider, or employer, with CMI able to support coordination but not responsible for providing or licensing other platforms.

- **Keep the Date & Time:** The meeting must match the exactly confirmed date and time of the original booking.
- **Assign an Organiser:** We strongly recommend the **apprentice acts as the organiser/admin** so they can admit the Assessor(s). If an employer or Training Provider sets up the meeting, they must join early to admit everyone and then **leave immediately** before the assessment begins.
- **Send Mandatory Invites:** You must invite the Apprentice, the Assessor(s), the Training Provider contact, and [epa@managers.org.uk](mailto:epa@managers.org.uk).
- **Confirmation:** Once the invite is received by the EPA team, we will send a confirmation email and update CMI's records with the new link.

## Reasonable Adjustments, Special Considerations & Extensions

All applications for reasonable adjustments, special considerations, and extensions must now be completed by the Training Provider directly within **Partner Connect**.

### How to Apply

For a step-by-step walkthrough of this process, please refer to the [Partner Connect Help Guide](#).

If your issue cannot be resolved via the Help Guide, please contact the Partner Services Team by submitting this [enquiry form](#).

### Compliance

For full details on eligibility and evidence, consult the CMI EPA - Reasonable Adjustments and Special Considerations Policy on the CMI website.

### Support Boundaries

The EPA Customer Service Executives can advise on the SC/RA process but do not process applications. You will need to use the CPC enquiry forms to log an SC/RA request. The EPA Operations Team cannot process or advise on these applications; for specific queries contact the Awarding Body at [awardingbody@managers.org.uk](mailto:awardingbody@managers.org.uk).

### Guidance for the Apprentice: On the Day of the Assessment

|                             |  |
|-----------------------------|--|
| <b>Environment</b>          | Ensure a private room, stable internet connection, and working A/V equipment. No other individuals may attend or record the session. |
| <b>Identification</b>       | You must present a valid photo ID (Passport, Driving Licence, or Work ID) to the assessor.   |
| <b>Punctuality</b>          | Lateness exceeding 15 minutes will result in an automatic "no-show" failure.   |
| <b>Duration</b>             | The assessment lasts approximately 2 - 3 hours. Apprentices are encouraged to have a refreshment/drink available.                    |
| <b>Assessment Integrity</b> | Under no circumstances may the Apprentice share the assessment questions.  |

|                               |   |
|-------------------------------|---|
| <b>Sharing a presentation</b> | Apprentices must be able to share their screen during the presentation and should ensure they are familiar with the screen-sharing function in advance.                                     |
| <b>Use of AI</b>              | The use of any form of Artificial Intelligence during your live assessment is strictly prohibited, including the use of any AI recording, transcription, monitoring, or assistance service. |
| <b>Urgent Support</b>         | For immediate access issues on the day, call the CMI EPA Team at <b>020 7550 9160</b> immediately, followed by an email with "URGENT - LIVE ASSESSMENT" in the subject line.                |

## POST-ASSESSMENT: RESULTS, REFERRALS, & CERTIFICATION

### Accessing Results & Feedback

Once a Live Assessment is complete, the results undergo internal quality assurance (IQA) before publication.

### Timelines

Results are typically published on CMI Assess within **15 working days** of the Live Assessment Date.

### Notifications

Both the Training Provider and the apprentice will receive an email with a link to access and download the official Results Form.

### Feedback Policy

To ensure comparability across EPAOs, **CMI does not provide detailed feedback to apprentices who pass.** Developmental feedback is strictly reserved for referred apprentices to assist with their resit preparations.

### Referrals, Fails, & Resits

If an apprentice does not pass their assessment, their status will typically be updated to a "Referral." The CMI IQA team will notify the Training Provider via email.

## Booking a Resit

Resits must be requested by the Training Provider via CMI Assess.

## Resit Timelines

The apprentice has three calendar months from the date of this referral notice to resit and successfully complete this element; failure to do so will require the apprentice to retake the entire EPA. Note that a new assessor will be allocated, so you must ensure they are granted access to any necessary portfolios.

## Fail Grades

A definitive “Fail” grade will be recorded if an apprentice misses pre-Live Assessment deadlines or if **six months elapse** without any activity after entering Gateway. Where a Fail is recorded, and the apprentice/Training Provider accepts the outcome and any resulting Pass cap, the Training Provider must email [epa@managers.org.uk](mailto:epa@managers.org.uk) to request a new profile if they wish to attempt EPA again.. If the apprentice believes that mitigating circumstances contributed to the missed deadline or assessment outcome, they should not submit an appeal against the Pass cap. Instead, the training provider should submit a **Special Consideration request via CMI Partner Connect (CPC)**, where the circumstances can be formally reviewed in line with the appropriate process.

## Appeals & Enquiries

If you believe there has been an error with the assessment process, please consult the [CMI EPA Enquiries and Appeals Policy](#) on the website before proceeding.

- **Enquiries** are for perceived administrative errors (e.g., transcript mistakes or delays).
- **Appeals** are for suspected procedural unfairness, technical issues, or policy breaches.
- *Note: Neither process can be used to simply challenge a valid but disappointing final grade.*

## Apprenticeship Certificates

Upon successful completion of the EPA, CMI’s Certification team will send confirmation of your results via the government website and will apply for certification from the National Apprenticeship Service. The National Apprenticeship Service will send the certificate to the designated certificate address. Please note, that if there is any discrepancy between the details provided to CMI and the information on the apprentice’s Individual Learning Record (ILR), this may result in a delay in certification.

## Delivery

Certificates are issued within 12 weeks of the Live Assessment Date and are sent to the selected address provided at Gateway by the Training Provider. An exception is made where the apprentice has been made redundant, in which case the certificate will be sent to the apprentice's home address.

## Certificate Support

Please note: The Customer Service Executive Team **does not** issue or track certificates. For address changes or missing certificates, please contact the Certificates Team directly at [certificates@cmi.org.uk](mailto:certificates@cmi.org.uk).

## GLOSSARY, ABBREVIATIONS & NOTIFICATIONS

### Key Abbreviations

| Abbrev. | Full Name                                      |
|---------|--|
| AMCA    | Associate Management Consultant Apprenticeship |
| APM     | Associate Project Manager                      |
| BA      | Business Administrator                         |
| CMI     | Chartered Management Institute                 |
| CMDA    | Chartered Manager Degree Apprenticeship        |

| Abbrev.               | Full Name                          |
|-----------------------|------------------------------------|
| ILR                   | Individual Learner Record          |
| IL                    | Improvement Leader                 |
| JMCA                  | Junior Management Consultant       |
| LAD                   | Live Assessment Date               |
| ODM v1.2<br>- OM v1.4 | Operations or Departmental Manager |

|              |   |
|--------------|---|
| <b>DfE</b>   | Department for Education                    |
| <b>EPA</b>   | End-Point Assessment                        |
| <b>SLMDA</b> | Senior Leader Masters Degree Apprenticeship |
| <b>ULN</b>   | Unique Learner Number                       |

|                           |                              |
|---------------------------|------------------------------|
| <b>SBP</b>                | Strategic Business Proposal  |
| <b>SE</b>                 | Skills England               |
| <b>SLA</b>                | Senior Leader Apprenticeship |
| <b>TLS v1.2 - TL v1.4</b> | Team Leader or Supervisor    |

## EXPECTED EMAIL NOTIFICATIONS TIMELINE

Throughout the EPA process, Apprentices and Training Providers can expect to receive automated email notifications at key milestones.



Note: These notifications are indicative and vary depending on your specific apprenticeship standard. If you do not receive an expected notification, please check your spam folder before contacting the EPA Team.

- 1. Gateway Accepted or Rejected:** Confirmation that the apprentice is approved to proceed.

2. **Live Assessment Booked:** Confirmation of the date, time, and Google Meet link.
3. **Standard-Specific Triggers:**
  - Presentation Topic Set (e.g., for L3 TLS V1.2).
  - Knowledge Test Booked (e.g., for L3 BA V1.0).
4. **Upload Deadline Reminders:** Automated alerts sent at set intervals (e.g., 5, 7, or 9 days) before your final portfolio or proposal upload deadline.
5. **Submission Accepted/Rejected:** Confirmation regarding final uploaded documents (e.g., for L5 ODM V1.2 and SBP L7 SLA V1.2).
6. **Results Released:** Notification that final grades are published and the Results Form is ready to download.
7. **EPA Survey Reminder:** A brief feedback survey sent after the process concludes.

## CONTACT AND SUPPORT INFORMATION

| Contact Email  | Query Type  |
|--|---|
| <a href="mailto:epa@managers.org.uk">epa@managers.org.uk</a>                       | All standard End-Point Assessment (EPA) queries.  |
| <a href="mailto:qualifications@managers.org.uk">qualifications@managers.org.uk</a> | EPA/FE (Further Education) partners and learner queries regarding Registrations/Partner Connect, Toolkit access, profile detail changes, and general qualification queries.           |
| <a href="mailto:Partnership@managers.org.uk">Partnership@managers.org.uk</a>       | HE (Higher Education)/University partners and learner queries (for the exact same topics listed above).   |
| <a href="mailto:epa.absupport@managers.org.uk">epa.absupport@managers.org.uk</a>   | Specific, non-redirectable support requests including Additional Learning Needs (ALN), Reasonable Adjustments, Extensions, marking/moderation queries, and formal complaints/appeals. |
| <a href="mailto:certificates@cmi.org.uk">certificates@cmi.org.uk</a>               | Certificate-related issues, including the non-receipt of an Award, Certificate, or Diploma, and API issues.   |

|  |   |
|--|---|
| <a href="mailto:employerandpartnerprovider@managers.org.uk">employerandpartnerprovider@managers.org.uk</a> | Queries from new potential Training Providers interested in using CMI for EPA services. |
| <a href="mailto:tdm@managers.org.uk">tdm@managers.org.uk</a>   | Requests to become an Independent Assessor (IAA) contractor.                            |

## SERVICE LEVEL AGREEMENTS (SLAS)

The EPA Operations and EPA Customer Support Executives strive to meet the following SLAs for all queries and requests:

### Communication -

- **Emails:** Acknowledged and responded to within 48 hours.
- **Phone Messages:** Returned within 24 hours.
- **Supplemental Forms (e.g., Resit, Change of LAD):** Acknowledged within 48 hours.

Please note - SLAs may vary during bank holidays and festive closure periods; we appreciate your understanding and encourage you to plan accordingly, as response times may be extended during these times.

### EPA Processes

- **Gateway Reviews:** Completed within 5 working days.
- **Live Assessment Sourcing:** If an assessor has not been sourced within 14 days of a booking request, the EPA Bookings Team will contact the apprentice and Training Provider to arrange alternative dates.

Note: Sourcing may take longer during peak periods (June–September; December).

- **Invoicing:** Cancellation and resit invoices are typically issued within 6 weeks of the chargeable action.

# Chartered Management Institute (CMI)

## Chartered Management Institute (CMI)

CMI is the only Chartered Body for management and leadership, setting the standard for professional excellence in the UK and internationally. CMI works through a global network of employers and approved education partners who deliver CMI programmes to their learners and staff, with CMI providing the Professional Standard, qualification frameworks, quality assurance and Chartered pathways.

CMI supports a community of over 230,000 members across 170 countries and partners with more than 1,000 universities and education providers worldwide, including 154 outside the UK. With 64 centres across Asia-Pacific and 60 across the Middle East and North Africa, CMI is helping to develop the next generation of managers and leaders globally.

Backed by Royal Charter, CMI is also the only organisation able to award Chartered Manager status and Chartered Management Consultant status, recognising the highest standards of professional practice.

For more information, please visit [www.managers.org.uk](http://www.managers.org.uk)

### Social media channels:

LinkedIn: [Chartered Management Institute](#)

Facebook: [@bettermanagers](#)

Instagram: [@cmi\\_managers](#)

TikTok: [@cmi\\_managers](#)

YouTube: [@cmimanagers](#)

### Ensure this information is also added:

Chartered Management Institute  
1-2 Grafton Court, Kettering Parkway  
Kettering, NN15 6XR

Registered charity number 1091035  
Incorporated by Royal Charter  
Charity registered in Scotland number SCO38105

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