



End-point assessment plan for Occupational Therapist (Degree) apprenticeship standard

Standard reference number	Level of this EPA plan	Integrated
ST0517	6	Integrated degree apprenticeship

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Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Occupational Therapist apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to Occupational Therapist apprentices, their employers and training providers.

The apprenticeship degree must comprise 360 (BSc) /160 MSc credits. 340 (BSc) /140 MSc credits must be dedicated to on-programme learning and assessment. The final 20 credits of the programme must be dedicated to the EPA.

Full time apprentices will typically spend 48 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

As a gateway requirement and prior to taking the EPA, apprentices must complete all approved qualifications mandated in the Occupational Therapist standard.

For level 3 apprenticeships and above, apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period lasting a maximum of 6 months, beginning when the apprentice has met the EPA gateway requirements.

The EPA consists of 2 distinct assessment methods.

The individual assessment methods will have the following grades:

Assessment Method 1

- Pass
- Fail

Assessment Method 2

- Distinction
- Pass
- Fail

Performance in the EPA will determine the overall apprenticeship grades of:

- Distinction
- Pass
- Fail

EPA summary table

On-programme (typically, 48 months)	Training to develop the occupation standard's knowledge, skills and behaviours.
End Point Assessment Gateway	<ul style="list-style-type: none"> • Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard • English/mathematics Level 2 • Achievement of 340 credits of the BSc (Hons) in Occupational Therapy or 140 of MSc in Occupational Therapy <p>Apprentices must complete:</p> <ul style="list-style-type: none"> • a portfolio of evidence
End Point Assessment (which would typically take 6 months)	<ul style="list-style-type: none"> • Assessment Method 1: Demonstration of Practice (three stations) • Assessment Method 2: Professional Discussion
Professional recognition	<p>Aligns with recognition by:</p> <ul style="list-style-type: none"> • On successful completion of an approved programme, apprentices are eligible to apply to the Health and Care Professions Council (HCPC) for registration as an Occupational Therapist, which is a requirement to practice under the protected title of Occupational Therapist. • The Royal College of Occupational Therapists.

Length of end-point assessment period:

The EPA (including all assessment methods) must be completed within **6** months of the first part of the end-point assessment commencing and within the total EPA period.

Order of assessment methods

The assessment methods can be delivered in any order.

Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirements prior to beginning EPA:

English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

Apprentices must complete the following approved qualifications as mandated in the standard:

The apprentice must have achieved 340 BSc / 140 MSc credits towards BSc (Hons)/MSc Occupational Therapy.

The final 20 credits of the programme must be dedicated to the EPA.

For the demonstration of practice:

- No specific requirements

For the Professional Discussion, the apprentice will be required to:

Complete a portfolio of evidence. The portfolio will **not** be assessed by the EPAO and does not need to be submitted to them prior to the professional discussion taking place. It will be used by the apprentice to underpin the discussion, selecting items to inform and enhance their evidence.

The portfolio of evidence, developed on-programme, should:

- Provide evidence of the apprentice's progress and achievements
- Be personally managed and owned by the apprentice
- Be drawn from both formal and informal learning activities
- Only include case related activity that is anonymised
- Be used through the apprenticeship for review and personal development planning
- Be mapped to the domains and knowledge, skills and behaviours of the occupational therapist integrated degree apprenticeship standard.
- Be completed prior to the EPA assessment gateway
- Provide content that can be drawn upon during the EPA professional discussion

The portfolio can be either paper-based or electronic in format.
Suggested structure for the portfolio of evidence:

- Table of contents
- Portfolio introduction e.g. purpose of the portfolio
- Key contacts information
- Planning - SWOT analysis, PDP, individual learning plans
- Collation of evidence, learning and clinical-reasoning mapped to the knowledge skills and behaviours of the occupational therapist integrated degree standard
- Commitment statements
- Off-the-job learning evidence
- Formal learning opportunities record
- Mandatory training record (including relevant employer and training provider policies)
- Programme of study - Programme learning outcomes, module descriptors etc.
- Course work (e.g. assessments & feedback)
- Attendance register / records
- Research

Assessment Methods

Assessment Method 1: Demonstration of Practice

Overview

This assessment method will test the apprentice holistically. The apprentice will be observed demonstrating practice, based on a 'scenario' in a simulated environment for the three stations of this method. The apprentice must complete each station in the order they are presented in the EPA plan. The same independent assessor will assess each station. The independent assessor will assign the final grade for the method once all the stations have been completed. The apprentice must have the tools and equipment available to them to enable them to conduct the demonstration of practice.

Apprentices must be observed by an independent assessor completing a practical demonstration which is made up of 3 stations in which they will demonstrate the KSBs assigned to this assessment method. The end-point assessment organisation will arrange for the observation to take place, in consultation with the employer. They will also provide a person with whom the apprentice can interact and demonstrate practical assessment techniques and interventions.

Practical demonstrations must be carried out over a maximum total assessment time of 2 hours (120 minutes.) The assessment stations may not be split, other than to allow comfort breaks as necessary.

Rationale for selecting this method:

Occupational therapists work with individuals from birth to end of life including those with physical and mental health conditions, injury, learning disabilities, long-term conditions, palliative care needs and who find themselves displaced from their societies. Occupational Therapy is provided in a variety of settings and changing situations with many variables on a daily and even hourly basis. Therefore, it is appropriate to do an assessment and practical demonstration in a controlled environment to ensure all apprentices are provided with a consistent and standardised assessment process and experience.

An observation of practice in a live practice setting was not selected, as this will not cover the breadth and depth of practice required. It avoids situations where individuals are not available on the day, do not give consent to being observed with the apprentice and issues around confidentiality. This method will ensure consistency.

The assessment stations are:

- Station 1 Assessment and intervention planning – 10 minutes reading and 40 minutes demonstration. Total time 50 minutes
- Station 2 Activity analysis – 5 minutes reading time. 25 minutes analysis. Total time 30 minutes. Assessor to provide the item to be analysed e.g. bread, butter, knife for making a sandwich, a mobile phone, a piece of clothing etc
- Station 3 Occupational Performance – 5 minutes reading time. 25 minutes analysis. Total time 30 minutes.
- Q&A – following the three assessment stations -10 minutes

The independent assessor has the discretion to increase the time of the practical demonstration by up to 10% to allow the apprentice to complete a demonstration that is part of this element of the EPA.

The independent assessor must assess only one apprentice at a time during this assessment method.

The independent assessor must:

- On the assessment day, select at random a 'scenario' from the bank of scenarios provided by the EPAO for each station.
- Check the controlled environment is suitable and has the required equipment for the apprentice to demonstrate the KSBs mapped.
- Check the 'person' has understood the brief provided for the 'scenario'
- Observe the apprentice demonstrating the KSBs mapped to the assessment method.
- Interact appropriately with the apprentice while they are observing, using a range of questions and prompts to seek clarity on what and/or why the apprentice has done something.
- Ensure the apprentice has been given the opportunity to demonstrate all of the knowledge, skills and behaviours for the assessment method.
- Use the structured template to conduct the assessment.
- Use the grading matrix to grade the assessment method.
- Decide the overall assessment method grade.

The 'Person' will be:

- A 'live subject' with whom the apprentice can interact with and demonstrate practical assessment techniques and interventions.
- Sufficiently briefed by the independent assessor in advance of the demonstration of practice.
- Provided with a one-page brief on the 'scenario' prior to the assessment.
- Required to follow the brief and enact what is required.
- Required to adhere to confidentiality about all aspects of the assessment and the brief they have been provided with.

Delivery

Apprentices must be provided with both written and verbal instructions on the tasks they must complete, including the timescales they are working to.

EPAOs will create and set open questions to assess related underpinning knowledge, skills and behaviours, guidance will be given by the EPAO to assessors for the questioning element. The independent assessor can ask questions both during and after the practical demonstration. Questioning must be completed within the total time allowed for the practical demonstration.

KSBs observed and answers to questions must be documented by the independent assessor.

The independent assessor will make all grading decisions.

Questions and resources development

EPAOs will produce specifications to outline in detail how the practical demonstrations will operate, what it will cover and what should be looked for. It is recommended that this be done in consultation with employers. EPAOs should put measures and procedures in place to maintain the security and confidentiality of their specifications if employers are consulted. Specifications must be standardised by the EPAO.

EPAOs must develop a 'practical scenario brief bank' and 'question bank' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the specifications they contain, are fit for purpose. The specifications, including questions relating to underpinning knowledge, skills and behaviours must be varied, yet allow assessment of the relevant KSBs.

Venue

Practical demonstrations must be conducted in one of the following locations:

A suitable venue provided and equipped by the EPAO (for example, a training provider's premises, or another employer's premises) or, the apprentice's own employer's premises.

The venue must:

Provide standard occupational therapy furniture and equipment appropriate for each of the scenarios.

Support material

EPAOs will produce the following material to support this assessment method:

- Station 1 - No more than a 2-page (500 word) summary. Produce a one-page scenario brief for the 'person' and share with the 'person' half an hour prior to the assessment commencing
- Station 2- The title of a daily living 'occupation' together with a 1 page brief of no more than 250 words
- Station 3- Brief of no more than 2 pages (500 words) see detail below.

The EPAO must:

- Develop a structured template for the independent assessor to use for managing and grading of the assessment to ensure consistency and moderation.
- Ensure an appropriate controlled environment is provided for the assessment.
- Appoint an appropriate 'person' and ensure they are provided with scenario briefs

Other relevant information

Following the completion of the three stations, the independent assessor will have 10 minutes to clarify why an apprentice carried out a particular intervention and/or made a certain decision and discuss aspects of any of the knowledge, skills and behaviours not directly observed.

Station 1: Assessment and intervention planning

Overview

The apprentice will undertake the 'assessment and interventions planning' station where they will demonstrate the critical elements of occupational therapy practice safely and effectively. They will demonstrate the knowledge, skills and behaviours required for this method.

Delivery

The practical demonstration must be conducted in the following way, to take account of the occupational context in which the apprentice operates:

The apprentice will be presented with a scenario brief for this station. It must contain an introduction, including the setting in which this would be taking place (home,

hospital, school etc), the person's details, reason for referral including a diagnosis or identified problem, and a brief history.

The apprentice must analyse the information and then conduct an initial interview and design an intervention plan with the 'person'. The apprentice can use any tools or equipment made available to them.

The apprentice must have:

- 10 minutes - to review and assimilate the scenario brief
- 40 minutes - to demonstrate the 'assessment and intervention planning' they will do with the 'person and write up a record of their analysis.

The following activities **MUST** be observed during the practical demonstration, that is a practical demonstration without these tasks would seriously hamper the opportunity for the apprentice to demonstrate occupational competence in the KSBs assigned to this assessment method.

The apprentice is required to:

- Review and assimilate the information provided in the scenario brief to inform the initial interview and intervention approaches they will undertake
- Conduct an initial interview with the 'person'
- Discuss with the 'person' an appropriate intervention plan for the management of their needs
- Explain and give a rationale for why they have recommended the interventions discussed
- Demonstrate their knowledge of the occupational therapy process
- Demonstrate their use of the occupational therapy evidence base to justify the decisions they take
- Produce a written record of the assessment and intervention in line with national standards for record keeping

Station 2: Activity analysis

Overview

The apprentice will undertake the 'Activity Analysis' station to demonstrate the process of breaking down an 'occupation' into steps and detailed sub-parts and examining them. The apprentice will demonstrate to the independent assessor their skills in 'activity analysis' which is a core tool of occupational therapy practice and the associated knowledge, skills and behaviours required to practice this safely and effectively to collaboratively reach solutions to the issues people face.

Delivery

Apprentices must be provided with both written and verbal instructions on the tasks they must complete, including the timescales they are working to.

The practical demonstration should be conducted in the following way to take account of the occupational context in which the apprentice operates:

The assessor will provide the item to be analysed together with the written brief (no more than 250 words).

The apprentice will have 5 minutes reading time and then 25 minutes to demonstrate:

‘Activity analysis’ on a daily living ‘occupation’ as identified by the independent assessor. e.g. bread, butter, knife to make a sandwich, using a mobile phone, putting on a piece of clothing.

The apprentice will be required to break down the activity into steps and detailed subparts. They are required to examine the subparts in detail in order to understand and explain the effect an activity will have on the individual.

The following activities **MUST** be observed during the practical demonstration, that is a practical demonstration without these tasks would seriously hamper the opportunity for the apprentice to demonstrate occupational competence in the KSBs assigned to this assessment method.

The apprentice must:

- Complete an ‘activity analysis’ on a given daily living ‘occupation’
- Demonstrate their consideration of the physical, cognitive, psychological and socio-cultural elements of the occupation
- Demonstrate their understanding of the relation to and effect of the ‘occupation’ on health wellbeing and function

Support material

EPAOs will produce the following material to support this assessment method:

- A brief containing the title of a daily living occupation e.g. making a sandwich, using a mobile phone, putting on a piece of clothing.
- A structured template for the independent assessor to use for managing and grading of the assessment to ensure consistency and moderation.
- Ensure an appropriate controlled environment is provided for the assessment.

Station 3: Occupational performance

Overview

The apprentice must demonstrate to the independent assessor how using equipment, assistive technology or environmental adaptation to enhance a person's occupational function is a critical element of Occupational Therapy practice. The apprentice will demonstrate how to facilitate use of a piece of equipment as well as their ability to explain occupational therapy tasks clearly and in a way that people can understand.

Delivery

Apprentices must be provided with both written and verbal instructions on the tasks they must complete, including the timescales they are working to.

The practical demonstration should be conducted in the following way to take account of the occupational context in which the apprentice operates:

The apprentice will have 5 minutes reading time and 25 minutes to describe and demonstrate to the independent assessor a piece of assistive equipment e.g. wheelchair, raised toilet seat, walking frame, sensory equipment

The following activities **MUST** be observed during the practical demonstration, that is a practical demonstration without these tasks would seriously hamper the opportunity for the apprentice to demonstrate occupational competence in the KSBs assigned to this assessment method.

The apprentice is required to:

- Explain to the independent assessor the rationale for using the specific piece of equipment
- Demonstrate to the independent assessor how to use the specific piece of equipment in a safe manner
- Demonstrate their understanding of using the piece of equipment in relation to the independent assessor, the environment, occupation and performance

Support Material

EPAOs will produce the following material to support this assessment method:

- Scenario brief for the station on what is required to be demonstrated and the appropriate piece of equipment
- A structured template for the independent assessor to use for managing and grading of the assessment to ensure consistency and moderation.
- Ensure an appropriate controlled environment is provided for the assessment

Assessment Method 2: Professional Discussion

Overview

This assessment will take the form of a professional discussion, which must be structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method.

The professional discussion can take place in any of the following:

- A suitable venue selected by the EPAO (e.g. a training provider's or another employers' premises.) or the apprentice's own employer's premises.

The rationale for this assessment method is:

The professional discussion will allow the apprentice to demonstrate the depth and breadth of the occupational therapy knowledge, skills and behaviours required to practice both safely and effectively. As a structured, in-depth two-way conversation between the independent assessor and apprentice, the professional discussion will provide an effective holistic assessment. Giving an opportunity to demonstrate the complex understanding and knowledge that is valuable in determining not only what and how an apprentice is performing but that are essential for occupational therapy practice.

The discussion format is an excellent method to cover the range of knowledge, skills and behaviours required. It will include the opportunity for the apprentice to use supportive evidence from their on-programme portfolio to inform and enhance the discussion.

Delivery

The independent assessor will conduct and assess the professional discussion. The independent assessor for the professional discussion may be a different assessor to the demonstration of practice assessor.

The professional discussion must last for 60 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, for example where signing services are required.

During the discussion, the independent assessor must combine questions from the EPAO's 'question bank' with supplementary questions generated by themselves.

The professional discussion will be conducted as set out here:

The apprentice will undertake a 1:1, face to face, professional discussion with the independent assessor.

The independent assessor must:

- Structure the professional discussion with questions chosen from a 'question bank' developed by the EPAO that cover the occupational therapist integrated degree apprenticeship domains.
- Use a minimum of one lead discussion question in relation to each of the four standard domains from the bank of questions provide by the EPAO.
- Use a format for the discussion that facilitates professional dialogue, rather than one that adopts a formulaic approach to questions and answers. In keeping with this, the independent assessor must use a facilitative questioning style, pursuing key points and issues to explore the depth of applied knowledge and understanding held by the apprentice.
- Ensure the apprentice has been given the opportunity to demonstrate all of the knowledge, skills and behaviours for the assessment method.
- Use the structured template to conduct the assessment.
- Use the grading matrix to grade the assessment
- The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.
- The independent assessor will make all grading decisions

The Apprentice is required to:

- Interact with the independent assessor in a discussion to demonstrate their knowledge, skills and behaviours as required for the professional discussion.
- The apprentice must bring their completed portfolio of evidence to the professional discussion, so they can draw on the contents of the portfolio to underpin the discussion, selecting items to inform and enhance the discussion.

Venue

The professional discussion should take place in a quiet room, free from distractions.

Other relevant information

A structured specification and 'question bank' must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of professional discussions and reaching consistent judgement.

EPAOs will produce the following material to support this assessment method:

- A structured template for the independent assessor to use for managing, recording and grading the professional discussion to ensure consistency and allow for moderation.

Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

Grading

Assessment Method 1: Demonstration of Practice

KSBs	Name of grade	Grade descriptor
K7 K8 K17 K18 K30 K31 S1 S2 S3 S4 S6 S8 S15 S16 B1 B2 B3 B4 B12 B13	Pass	<p>The apprentice can:</p> <p>Demonstrate correctly how to undertake an occupational therapy assessment and intervention with an individual. (S1, S4, K7)</p> <p>Demonstrate proficiently how to complete an accurate activity analysis to identify the occupational needs and strengths of an individual in relation to the given activity. (S2, K8)</p> <p>Demonstrate that they can correctly engage in a therapeutic relationship with an individual whereby agreed goals, types of intervention and outcomes can be explored. (S6)</p> <p>Demonstrate correctly how to assess, prescribe and facilitate the effective use of equipment, assistive technology and the need for environmental adaptation and discuss how these interventions will enhance occupational performance. (S3, S8)</p> <p>Explain and demonstrate accurately how they practice within their scope of practice as an occupational therapist as defined by regulatory and professional bodies. (B1, B2)</p> <p>Demonstrate correctly through their occupational therapy assessment, effective goal planning and intervention with an individual that they can work safely within their own scope of practice. (B4)</p> <p>Demonstrate duly through their practice that they work in a person centred, strengths-based approach way and use an occupational focused theoretical model to correctly assess the level of need of an individual. (B3, K17)</p> <p>Apply their knowledge, skills and experience to work accurately with the individual to improve their occupational performance and balance. (K18)</p>

		<p>Gain informed consent from an individual prior to assessment and intervention (B12)</p> <p>Explain correctly what occupational therapy is and discuss the purpose of the intervention to be undertaken. (S16, B13)</p> <p>Correctly modify and apply a range of interpersonal, communication and technological approaches to meet the needs of the individual and enable the individual to make informed decisions. (S15, K30, K31)</p>
	Fail	The apprentice has failed to meet the pass criteria

Assessment Method 2: Professional Discussion

KSBs	Name of grade	Grade descriptor
K1 K2 K3 K5 K10 K12 K13 S5 S9 S11	Distinction	<p>The apprentice has achieved all of the pass criteria plus:</p> <p>Demonstrate critical engagement with the evidence base of occupational therapy to critically justify answers throughout the discussions. (S5, S9)</p> <p>Demonstrate a creative synthesis of knowledge, practice and theory, and provide evidence of innovative thinking around occupational therapy practice throughout the discussion. (K13, S9,)</p> <p>Articulate a critical self-awareness of personal learning and development throughout the discussion and critically discuss a specific example of where they have led, managed and innovated change to promote the benefits of the occupational therapy. (S11)</p> <p>Demonstrated a critical understanding throughout the discussion of occupational therapy assessment and interventions in relation to individuals' occupational needs, well being, environment and wider community. (K1, K2, K3, K5, K10, K12)</p>
K1 K2 K3 K4 K5 K6 K9 K10 K11 K12 K13 K14 K15 K16 K19 K20 K21 K22 K23 K24 K25 K26 K27 K28 K29 S5 S7 S9 S10 S11 S12 S13 S14 B5 B6 B7 B8 B9 B10 B11	Pass	<p>The apprentice can:</p> <p>Explain the key concepts and knowledge base of occupational therapy accurately by defining the origins of the profession, its development and how this supports the philosophical framework and theoretical concepts of occupational therapy in professional practice. (K1, K2, K3, K5)</p> <p>Explain the impact of occupational dysfunction and deprivation on individuals by being able to correctly define the structure of the human body and mind in relation to a given disorder, dysfunction or disease that effects the health, wellbeing and function of that individual and their wider community. (K4, K6, K9)</p> <p>Accurately discuss a range of meaningful, purposeful and evidenced based activities and occupations that can be used as intervention in collaboration with an individual, group or wider</p>

		<p>community. This explanation will acknowledge the importance of health promotion, prevention and self-management as part of the intervention process and reflects current policy and legislation that guides practice. (K10, K12, K14, K15, S5, S10)</p> <p>Correctly discuss the importance of reflection and supervision in exploring diversity, human behaviour, complex and innovative practice, recognising the need to modify and adapt intervention to enhance occupational performance in given environments (K11, K13, S7, S9)</p> <p>Correctly discuss the regulatory and professional standards and requirements which govern their practice and the requirement to self-appraise and engage with on-going professional development. (K16, B5, B8, B9)</p> <p>Accurately reflect on the relationship between health, occupation and wellbeing and the impact that a disruption to these elements can have on an individual, carers, groups and the wider community. (K19, K20, B7)</p> <p>Discuss how an occupational therapist would accurately adapt practice to address culture, diversity and equality in order to meet the occupational needs of individuals, groups and communities. (K21, B6)</p> <p>Discuss why it is important to work collaboratively in a person-centred way to provide effective intervention and how they have worked with individuals, professionals/agencies in practice. (K24, K25, S12, S14)</p> <p>Discuss how learning, supervision, research and audit informs and enhances accurate practice and how they have carried this out in practice. (K23, K26, K27, S13)</p> <p>Explain the concept of leadership and management and why it is important to bring these factors correctly and meaningfully into practice as an occupational therapist. (K22, B10, S11)</p> <p>Explain what informed consent is, why it is important and how it is correctly obtained. (K28)</p>
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		Explain the importance of managing records accurately and other information correctly in accordance with legislation, regulatory, professional and organisational standards. (K29, B11)
	Fail	The apprentice has failed to reach the pass criteria.

Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment Method 1 Demonstration of practice	Assessment Method 2 Professional Discussion	Overall grading
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Pass	Pass	Pass
Pass	Distinction	Distinction

Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> • participate in development opportunities to improve their knowledge skills and behaviours as outlined in the standard • meet all gateway requirements when advised by the employer • understand the purpose and importance of EPA and undertake EPA
Employer	<ul style="list-style-type: none"> • support the apprentice to achieve the KSBs outlined in the standard to their best ability • determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA • select the EPAO • confirm all EPA gateway requirements have been met • confirm arrangements with EPAO for the EPA (who, when, where) in a timely manner • ensure apprentice is well prepared for the EPA
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> • understand the occupational role • appoint administrators/invigilators and markers to administer/invigilate and mark the EPA • provide training and CPD to the independent assessors they employ to undertake the EPA • provide adequate information, advice and guidance documentation to enable apprentices, employers and providers to prepare for the EPA • deliver the end-point assessment outlined in this EPA plan in a timely manner • prepare and provide all required material and resources required for delivery of the EPA in-line with best practices • use appropriate assessment recording documentation to ensure a clear and auditable mechanism for providing assessment decision feedback to the apprentice • have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest • maintain robust internal quality assurance (IQA) procedures and processes, and conducts these on a regular basis • conform to the requirements of the nominated external quality assurance body • organise standardisation events and activities in accordance with this plan's IQA section

	<ul style="list-style-type: none"> organise and conduct moderation of independent assessors' grading in accordance with this plan have, and operate, an appeals process arrange for certification with the relevant training provider
Independent assessor	<p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> understand the standard and assessment plan deliver the end-point assessment in-line with the EPA plan comply to the IQA requirements of the EPAO be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest satisfy the criteria outlined in this EPA plan hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading have the capability to assess the apprentice at this level attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway Plays no part in the EPA itself

Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have:
Three years previous experience of working as an occupational therapist in a variety of settings/environments and using assessment, intervention, critical reflection and the application of analytical skills to collaboratively reach solutions through occupations to the issues people face. The different settings might include health, social care education and other private or voluntary sector organisations.
- appoint independent assessors with a Master's Degree
- ensure independent assessors have the following minimum skills, knowledge and occupational competence:
 - Health and Care Professions Council Registered Occupational Therapist
 - Hold a post graduate teaching qualification or equivalent
 - Demonstrate evidence of CPD relating to the role
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time. All Independent assessors must then attend annual standardisation events.

External Quality Assurance

The external quality assurance provider for this assessment plan is named on the Institute for Apprenticeships' website.

Re-sits and retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit any failed assessment methods only.

Any assessment method re-sit or re-take must be taken during the maximum EPA period, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

Affordability

Affordability of the EPA will be ensured by using at least some of the following practice:

- The independent assessor can assess more than one apprentice in a day
- Both assessment methods can be completed on the same day
- Using an employer's premises

Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for registration as Occupational Therapist with Health and Care Professions Council

Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making Reasonable Adjustments for this standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

Mapping of KSBs

Assessment Method 1: Demonstration of Practice

Knowledge
K7 The occupational therapy process and related terminology, e.g. Assessment, intervention and evaluation.
K8 The analysis and use of activities and occupations as therapy.
K17 How to identify the nature and level of an occupational need using specific occupational focused enquiry and theoretical models for example the Model of Human Occupation or Person-Environment-Occupational Performance model.
K18 How to apply occupational therapy knowledge, skills and experience in partnership with the person to improve their occupational balance and performance.
K30 How communication affects assessment and engagement; how to modify communication to take account of age, gender, capacity, learning and physical ability, culture, ethnicity and religious beliefs.
K31 The importance of providing people, their families and carers with accessible information to make informed decisions in a way that is sensitive to their needs

Skills
S1 Undertake occupational therapy assessment and interventions that demonstrate an understanding of the relationship between occupation and health and wellbeing.
S2 Select and use appropriate methods to identify occupational strengths and needs, using activity analysis as a core tool of practice. Make use of appropriate standardised and non-standardised assessments and outcome measures to critically analyse the findings.
S3 Assess, prescribe and facilitate use of equipment, assistive technology, and environmental adaptations when required to enhance occupational function.
S4 Use observation, verbal and non-verbal communication to gather information about occupational abilities and barriers.
S6 Develop a therapeutic relationship with the person to agree goals, choose specific occupations as therapy, and measure the impact of, and when to cease intervention.
S8 Conduct assessment or monitoring procedures, interventions, therapy or other actions safely, e.g. equipment provision, environmental adaptation and access to local community.
S15 Apply a range of communication strategies, interpersonal skills, media and technologies to support professional practice.

S16 Explain occupational therapy tasks clearly and in a way that people can understand (E.g. by using simple, clear language or pictures or other methods reflecting individual needs).

Behaviours

B1 Practice within the regulated scope of practice for Occupational Therapists as defined by HCPC and the RCOT.

B2 Practice as an autonomous occupational therapist assessing a situation and exercising professional judgement.

B3 Practice with a person centred, strengths-based approach.

B4 Work safely within your own scope of practice.

B12 Gain informed consent prior to assessment and interventions.

B13 You will be an effective advocate for your profession and the individuals you support and encourage self-advocacy where possible.

Assessment Method 2: Professional Discussion

Knowledge

K1 Key concepts and knowledge base relevant to occupational therapy.

K2 The origins and development of occupational therapy.

K3 The philosophical framework for occupational therapy.

K4 The structure and function of the human body and mind; development, disease, disorder and dysfunction relevant to occupational therapy.

K5 Theoretical concepts underpinning occupational therapy and occupational science, specifically the functional nature of humans.

K6 Activity, occupation and their relation to and effect on health, wellbeing and function.

K9 The effects of occupational dysfunction and deprivation on individuals, families, groups and communities; the importance of restoring and facilitating opportunities to achieve health and wellbeing through occupation.

K10 Social, environmental and work related policies and legislation and their effect on human needs and services within a diverse society.

K11 The value of diversity and complexity of human behaviour.

K12 The range of occupations and activities used in intervention and why these should reflect the individual's occupational needs.

K13 The value of critical reflection and supervision including the academic underpinning models of critical reflection; the potential of occupational therapy in new and emerging areas of innovative practice.

K14 The importance of health promotion, prevention and self-management.
K15 Group dynamics and roles; the importance of capitalising on dynamics within groups and communities to harness motivation and active involvement
K16 The HCPC Standards of Proficiency, HCPC Standards of Conduct, Performance and Ethics, COT Standards of Professional Practice, COT's Code of Ethics and Conduct and COT Entry Level Occupational Therapy Core Knowledge and Practice Skills
K19 The relationship between occupation, health and wellbeing and the factors that facilitate or challenge participation in occupation.
K20 The impact of occupational disruption in relation to the occupational performance of the individual, carers, groups and communities, and the value of restoring and creating opportunities for participation in occupation.
K21 The importance of the impact of culture, equality and diversity on practice; how to adapt practice in creative ways to meet the needs of individuals and groups within the scope of occupational therapy practice in a respectful and dignified manner.
K22 The concept of leadership and management approaches and styles and the importance of using personal initiative.
K23 The value of participation in training, supervision and mentoring.
K24 The importance of professional relationships, integrated working and working collaboratively with those who provide and receive services across different sectors and communities.
K25 How to empower people to take ownership of their care; the importance of person centred approaches to motivate and involve people in meaningful occupation.
K26 The role of audit and review in evaluating the quality of occupational therapy practice and service improvement.
K27 The use of research methodologies used in occupational therapy practice; the principles and applications of scientific enquiry.
K28 The concept of confidentiality and the principles of information governance.
K29 The importance of managing records and other information in accordance with legislation, protocols and guidelines found in the regulatory, professional body and organisational standards.

Skills

S5 Use evidence based research, clinical reasoning and problem solving to formulate management plans in collaboration with the person to support occupational performance e.g. preparing a meal/feeding themselves.
S7 Analyse, develop or modify therapy and environments to build peoples abilities and enhance occupational performance.
S9 Adapt practice to take account of new developments.

S10 Facilitate group work to address occupational needs that respect and reflect learning and change within communities.
S11 Use leadership and entrepreneurial qualities to lead, innovate and manage change, marketing and promoting the benefits of occupational therapy.
S12 Work collaboratively in partnership with others, for example charities, by using occupation to promote participation, health and wellbeing.
S13 Facilitate learning and awareness through designing and delivering activities for people, groups, partners and communities.
S14 Contribute to the delivery of effective and efficient services

Behaviours
B5 Work within the legislative and governance frameworks in which Occupational Therapy is delivered.
B6 Recognise and take account of physical, psychological, social, spiritual and cultural needs and diversity of individuals, groups and communities.
B7 Shape or structure your practice according to recognised theories, frameworks and concepts of occupational therapy, selecting the most appropriate theoretical background.
B8 Appraise own performance and service delivery, taking account of political, social and economic contexts.
B9 Demonstrate a commitment to lifelong learning[i] by actively engaging and taking responsibility for on-going professional development.
B10 Act as a leader by sharing a vision of occupational therapy and its value in all that you do to assure the quality of your practice and those for whom you are responsible
B11 Safeguard confidential information and maintain records in accordance with HCPC and RCOT standards, and local policies and procedures.