



## Job Families

Accounting and Finance Staff ensure that budgets are spent wisely and for the benefit of the organisation and its patients. Individuals working in this area could be working in the payroll department, making sure all their colleagues get paid, handling payments for goods and services in an accounts department or purchasing goods and services in the procurement department.

# Accounting & Finance

**Healthcare**  
Apprenticeships



## Level 2 Accounts / Finance Assistant

An Accounts/Finance Assistant is an integral part of the team responsible for maintaining an efficient and accurate finance function within a business. The Accounts/Finance Assistant is responsible for assisting the team of accountants with junior accounting duties.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** Apprentices will be required to take one of the professional qualifications listed below, as chosen by the employer to be most relevant to the job role:

- (A) AAT Level 2 Certificate in Accounting
- (B) ACCA Certificate in financial and management accounting (level 2)
- (C) IAB Level 2 certificate in bookkeeping
- (D) ICB Level 2 certificate in bookkeeping



## Level 3 Assistant Accountant

An Assistant Accountant provides support to internal and external customers and will work predominately either as an assistant accountant within practice or alternatively within the finance function of an organisation. Part of their role will involve assisting in the day to day financial activities such as data entry to month end management accounts and/or year-end financial statements. In addition the Assistant Accountant may find themselves involved in regulatory financial requirements such as the completion of VAT returns or assisting in the preparation of tax computations.

**Entry Requirements:** Individual employers set the selection criteria, but this is likely to include 5 GCSEs, including Maths and English, although some employers will accept other relevant qualifications and experience, including a relevant Level 2 qualification. Apprentices without English or Maths at Level 2 must achieve this prior to taking the end-point assessment.



## Level 3 Business Administrator

Business administrators have a highly transferable set of knowledge, skills and behaviours that can be applied in all sectors. This includes small and large businesses alike; from the public sector, private sector and charitable sector. The role may involve working independently or as part of a team and will involve developing, implementing, maintaining and improving administrative services. Business administrators develop key skills and behaviours to support their own progression towards management responsibilities.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** Where a business administrator has not already achieved Level 2 English and Maths, they must do so before taking the end-point assessment.



## Level 3 Compliance / Risk Officer

All financial services organisations have to meet a wide range of compliance and risk requirements set out in legislation. To meet these requirements many organisations will have dedicated Risk and/or Compliance departments that are experts in the relevant legislation/regulatory requirements. They provide proactive support and guidance to the business areas to ensure that the organisation meets this wide range of requirements, balanced against achieving appropriate customer outcomes.

**Entry Requirements:** Individual employers will set the selection criteria for their apprenticeships. It is recommended that employers may want most candidates to have Level 2 maths and English. Other relevant or prior experience may also be considered as an alternative.

**Qualifications:** The apprentice will complete one appropriate qualification (as considered most relevant by the employer) from one of the professional bodies listed in the standard document.



## Level 3 Payroll Administrator

Payroll Administrators will, typically, have responsibility for setting up and operating the payroll within the organisation in which they are employed or on behalf of another organisation. The role may be located within a business/organisation or in a payroll bureau, bookkeeping or accounting practice, or professional services company. The job may sit within the HR or Finance function.

**Entry Requirements:** Apprentices without Level 2 English and maths will need to achieve this level prior to taking End Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language



## Level 3 Procurement and Supply Assistant

Procurement and supply assistants are vital for the smooth functioning of the procurement and supply department in any organisation. They are often responsible for ensuring data is correctly administered and maintained in accordance with legislation of the organisation's own procedures. They will use their knowledge of procurement regulations/policies to support the wider procurement team in tasks such as quotation and/or tender response evaluation, supplier database maintenance, purchase order review and conversion, and stakeholder liaison.

**Entry Requirements:** As part of this apprenticeship the Trailblazer Group would recommend that learners do the CIPS ethical test online. This is free to CIPS members and is recognised as an essential aspect of the procurement function in today's competitive and complex supplier world.

**Qualifications:** Apprentices must complete an Level 3 Advanced Certificate in Procurement and Supply Operations

## Level 3 Workplace Pensions Consultant or Administrator

A Workplace Pensions Administrator is likely to be involved in a variety of tasks supporting more senior administrators. This may include, but not be limited to: Producing quotations and setting up benefits for members including retirement, death and leaving service before retirement, transfers into or out of the workplace pension scheme; Maintaining workplace pension scheme cash books; reconciling bank statements; preparing cash-flow forecasts; Collating information and drafting Administration Reports for clients.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** The apprentice will complete at least one or more of the qualification/examinations (as considered most relevant by the employer) as listed opposite.

 **Pensions Management Institute** – Award in Pensions Essentials, Retirement Provision Certificate; Certificate in

Pension Scheme Member Guidance; Certificate in Pensions Essentials (4 units); Certificate in Pensions Administration (4 units); Certificate in Pension Calculations (4 units); Diploma in Pensions Administration (4 units); Advanced Diploma in Retirement Provision (2 units)

**Chartered Insurance Institute** – Award in Financial Administration (Pensions option), Certificate in Financial Services

(2 units), Certificate in Life and Pensions (2 units)

**Chartered Institute of Payroll Professionals** – Certificate in Pensions Administration



## Level 4 Business Analyst

This occupation is found in the public and private sector, large multi-national companies and smaller independent enterprises. Business analysis exists in almost every sector, from not-for-profit organisations through to retail and the financial services. It's fast-paced and collaborative and provides a recognised career with professionals taking lead roles in successful change delivery. The broad purpose of the occupation is to understand the needs of stakeholders and how these can be met through business change and digital solutions. Business Analysts are change professionals that help organisations deliver business and digital change successfully.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** Apprentices without Level 2 English and maths will need to achieve this level prior to taking End Point Assessment.

## Level 4 Commercial Procurement & Supply

The work of procurement and supply professionals includes the process of procurement, or buying goods and services; however, these roles can be much broader than just procurement. These roles can extend to a huge range of related commercial activity such as influencing policy, financial analysis, engaging in contract law, and developing strategy to deliver services.

**Entry Requirements:** Any entry requirements will be determined by individual employers which may, for example, typically require 5x A\*-C Grade GCSEs (must include English & Maths).

**Qualifications:** Prior to the end-point assessment there is a requirement to achieve:

- Level 2 qualifications in English and Maths (GCSE equivalent), and
- L4 Diploma in Procurement & Supply with the Chartered Institute of Procurement & Supply (CIPS).



## Level 4 Professional Accounting or Taxation Technician

Individuals in the role of a Professional accounting or tax technician will have responsibility for creating, and/or verifying and reviewing, accurate and timely financial information within the organisation in which they are employed or on behalf of another organisation. This will be performed in order to meet relevant ethical, professional and legal standards, and will utilise the individual's knowledge of the business systems and processes, as well as standard accounting and tax practices.

**Entry Requirements:** Individual employers will identify entry requirements in terms of previous qualifications, training or other criteria. Most candidates will have Level 2 maths and English (equivalent to GCSE grade C or above), ideally as part of 5 GCSE A-C grades or other comparable qualifications. Apprentices without English or maths at Level 2 must achieve this prior to the completion of the apprenticeship



## Level 5 Payroll Assistant Manager

The Payroll Assistant Manager may work in a team as part of a large payroll department belonging to their own organisation, where they are given an area of responsibility. They may also work in small firms where they might be the most senior technical payroll lead. Some organisations outsource their payroll function to an external provider, so the occupation is also found in specialist payroll bureaux, agencies, and in arrangements known as an umbrella function. Payroll Assistant Managers could be responsible for delivering contracts with one or more clients who outsource their payroll responsibilities.

**Entry Requirements:** Individual employers will determine their own entry requirements.



## Level 6 Senior Compliance / Risk Specialist

Within the Risk/Compliance function of a specific organisation, the role of the Senior Compliance/Risk Specialist is to provide high quality input and advice to the business in their specialist area(s) of expertise e.g. risk, financial crime, compliance, modelling/analysing data. This is likely to include dealing with complex problems, implementing new legal/regulatory requirements, working with senior managers in the organisation. The role requires sound ethical standards, significant technical expertise, together with the capability to influence senior members of the organisation as there can often be differing views on the appropriate action to take.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** The apprentice will complete one appropriate qualification (as considered most relevant by the employer) from one of the Professional bodies as listed in the [standard document](#).

<https://haso.skillsforhealth.org.uk/>



## Level 7 Accountancy / Taxation Professional

Accountancy / Taxation Professionals are recognised around the world as respected leaders in accountancy, taxation, finance and business. From providing strategic business advice to audited financial statements or driving mergers and acquisitions, a career as an Accountancy / Taxation Professional can be diverse and challenging; it's not just about putting numbers into a spreadsheet. Accountancy / Taxation Professionals use technical knowledge, skills and experience to lead organisations and people to make responsible and sustainable financial decisions. They are required to act in the public interest and must therefore maintain the highest standards of professional conduct and competency; upholding ethical behaviour and integrity at all times.

**Entry Requirements:** Individual employers will determine their own entry requirements.

**Qualifications:** Apprentices without English or Mathematics at Level 2 must achieve this prior to the completion of the End Point Assessment.




## Case Study - Leona Renshaw

**Meet Leona Renshaw an Income and  
Contracts Assistant and an  
apprenticeship success story.**

## Training Providers:

Click on the below links for a list of registered providers for each standard:

- [Level 2 Accounts/Finance Assistant](#)
- [Level 3 Assistant Accountant](#)
- [Level 3 Business Administrator](#)
- [Level 3 Compliance/Risk officer](#)
- [Level 3 Payroll Administrator](#)
- [Level 3 Procurement & Supply Assistant](#)
- [Level 3 Workplace pensions Consultant or Administrator](#)
- [Level 4 Business Analyst](#)
- [Level 4 Commercial Procurement & Supply](#)
- [Level 4 Professional Accounting or Taxation Technician](#)
- [Level 5 Payroll Assistant Manager](#)
- [Level 6 Senior Compliance / Risk Specialist](#)
- [Level 7 Accountancy / Taxation Professional](#)




All providers who want to deliver apprenticeship training must be on the Register of Apprenticeship Training Providers (RoATP). Employers must choose a provider from the Register. Providers must meet a clear set of criteria in order to be included on the Register. These include financial health, capacity/capability and quality criteria. If a provider does not meet these criteria they will not be included on the Register.

## End Point Assessment

Click on the links for EPAOs registered for each apprenticeship standard:

- [Level 2 Accounts/Finance Assistant](#)
- [Level 3 Assistant Accountant](#)
- [Level 3 Business Administrator](#)
- [Level 3 Compliance/Risk officer](#)
- [Level 3 Payroll Administrator](#)
- [Level 3 Procurement & Supply Assistant](#)
- [Level 3 Workplace pensions Consultant or Administrator](#)
- [Level 4 Business Analyst](#)
- [Level 4 Commercial Procurement & Supply](#)
- [Level 4 Professional Accounting or Taxation Technician](#)
- [Level 5 Payroll Assistant Manager](#)
- [Level 6 Senior Compliance / Risk Specialist](#)
- [Level 7 Accountancy / Taxation Professional](#)



As part of their apprenticeship, apprentices will have to complete end-point assessment. The end-point assessment organisation will assess the apprentice in line with the Assessment Plan. This ensures that all apprentices are assessed holistically to a consistent standard at the end of their apprenticeship. Organisations offering end-point assessment will need to be registered on the Register of End-Point Assessment Organisations (RoEPAO).

## Applying and Further Advice

Candidates interested in applying for any of these apprenticeships should visit [NHS Jobs](#), [Find an Apprenticeship website](#) and the [Register of Apprenticeship Training Providers](#). It may also be worth contacting training providers directly to make enquiries about the apprenticeships they offer.

An apprentice will be over 16 and may earn more than the minimum apprenticeship wage. Pay is determined locally so whilst it may be higher, it cannot be lower than this amount. [Click here](#) for more information on apprentice pay.

Visit our [Accounting and Finance section](#) for further advice and guidance.

Alternatively, visit the Finance Staff section on the [Health Careers](#) website which has guidance including working life, rates of pay and career development.

Our [Apprenticeship Costing Calculator / Planning Tools](#) will help you calculate how much taking on an apprentice will cost.



## Resources

You can also visit [Step into the NHS](#) – this site has information on individual roles with guidance and real life stories.

You can read about [Lydia Wager](#) there, an Income and Costing Accountancy Assistant. "It's lovely to know that I am developing a successful career at the same time as making a positive difference to someone else."

# HASO

The HASO website has tools designed to help employers embed their apprenticeships, see resources below:

- Toolkit – The toolkit is designed to support employers through the process, end to end, from setting out employers organisational strategy right through to when the apprentices are in the workplace.
- Pathways tool – The pathways tool can be used to view different roles and how to move from one apprenticeship occupation to another.
- Costing Calculator tool – The calculator tool can be used to work out the potential cost of delivering apprenticeships.

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