

Employer Guide to the CILEx End-Point Assessment

LEVEL 3 PARALEGAL APPRENTICESHIP

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Welcome letter from Linda Ford, Chief Executive of CILEx



Dear Colleague,

Thank you for choosing The Chartered Institute of Legal Executives (CILEx) to deliver the End-Point Assessment for your Apprenticeship programme.

For over 50 years, CILEx has worked with organisations like yours to help legal professionals develop appropriate competence and skills. We are delighted to learn that you have decided to offer an Apprenticeship programme to your staff and we look forward to working with you.

Government support of Apprenticeship delivery offers an exciting opportunity for the whole of the professional services sector. An opportunity which we are sure will further widen access to the legal profession, offering an increasing number of alternative pathways to qualify as lawyers or paralegals, something that CILEx has always strongly advocated.

The concept of Trailblazer Apprenticeships is built upon employers being part of its design and delivery. The training standards, the delivery model, the choice of Training Provider and End Point Assessment organisations have all been developed through the Employer Group.

As a result, we can be sure that together we are delivering a robust and quality assured Apprenticeship programme and are confident that the future of the legal profession is in safe hands.

CILEx has extensive experience of Apprenticeship development, delivery and assessment. We have worked with industry experts and employers to design the first Legal Apprenticeships and are confident that choosing to develop and recognise your talent through Apprenticeships, will mean that your organisation will not only remain an employer of choice, but will also become more efficient, more productive and more competitive.

We look forward to working with you, your chosen training provider and your Apprentices.

A handwritten signature in black ink that reads "Linda Ford". The signature is written in a cursive style and is enclosed in a thin black rectangular border.

Linda Ford
Chief Executive Officer,
Chartered Institute of Legal Executives

End-Point Assessment Overview

'Paralegal' is the title given to a wide range of job roles operating across different areas of law and practice. The Paralegal Standard sets out a common core of competencies which applies to all Paralegals, regardless of the area of practice in which they work. CILEx's End-Point Assessment (EPA) is designed to enable Apprentices to meet the Paralegal Standard within their own area of practice.

The Paralegal Apprenticeship EPA takes two forms:

- The Interview supported by a Portfolio (the Interview);
- The Timed Assessment, which is in two parts.

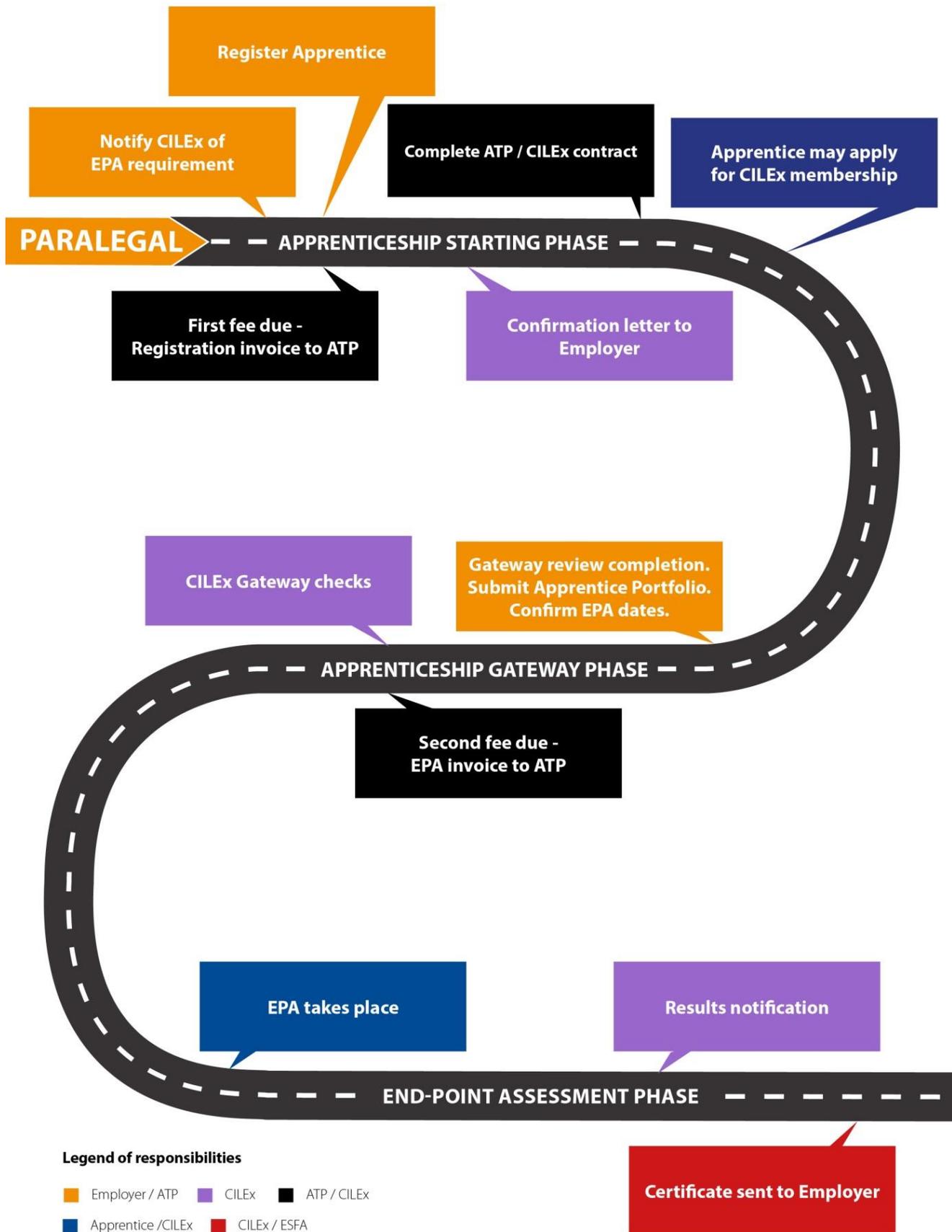
The Portfolio, which supports the Interview, is uploaded using OneFile. OneFile is an e-assessment system that allows the Apprentice to upload evidence and record progress online. Upon registration with CILEx your Apprentice will be issued with a log-in for their individual OneFile account. Training Providers and Employers can access and contribute to evidence for the Portfolio.

The Timed Assessments are set by CILEx and incorporate the relevant areas of law and practice for the Apprentice's job role. CILEx will ask you to confirm the areas of law and practice covered within the Apprentice's job role at the beginning of the Apprenticeship to ensure that appropriate Timed Assessments are available for the EPA. The Timed Assessments are delivered through the Surpass e-assessment platform.

Both the Interview and the Timed Assessments take place at an external test centre

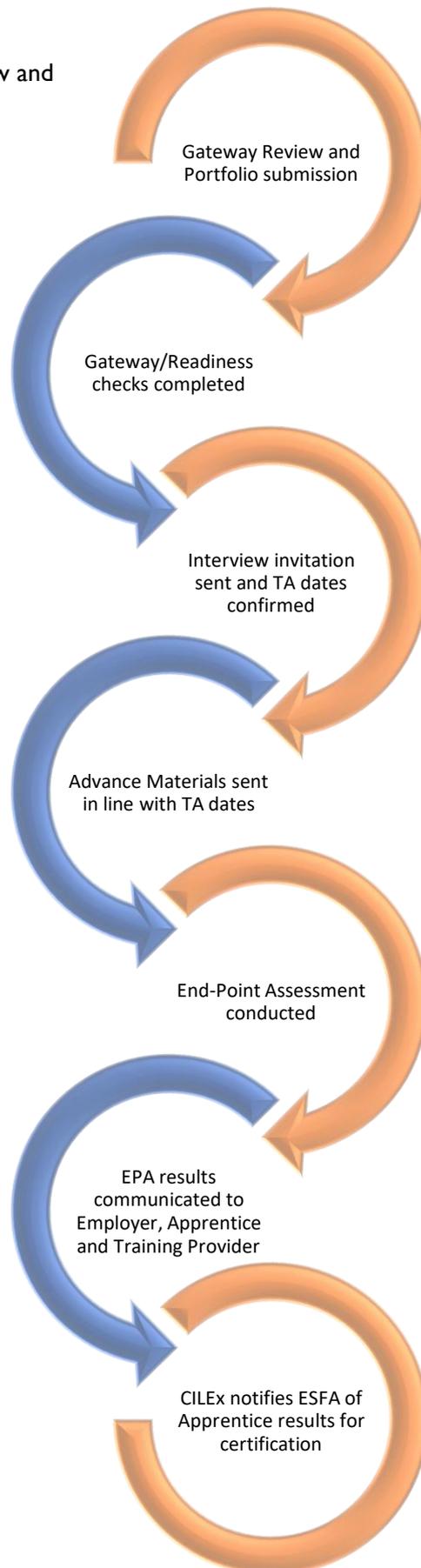
The whole EPA process from when the Portfolio is submitted at Gateway stage (see page 10) through to the issue of results takes approximately 16 weeks. The EPA Timeline on page 5 sets this out in more detail.

The Final Stages of the Apprenticeship Journey



End-Point Assessment Timeline

The trigger for the 16-week EPA period will be the Gateway review and submission of the portfolio.



Results will be issued within the 16-week EPA period.

What will CILEx do?

CILEx is responsible for ensuring its EPA consistently allows Apprentices to meet the national standard for Paralegals. We will therefore:

- develop the EPA in line with the area of law and practice the Apprentice is working in;
- mark and grade the EPA;
- Arrange the date, time and location of the Interview and Timed Assessments
- communicate the results of the EPA to Employers;
- apply to the Education and Skills Funding Agency (ESFA) for the issue of Apprenticeship certificates.

What will you need to do?

As the 'driver' of the Apprenticeship, you are responsible for:

- ensuring that the Apprenticeship chosen for each Apprentice is suitable and that the EPA reflects the apprentice's job role and learning plan;
- registering Apprentices with CILEx;
- notifying CILEx of the areas of law and practice covered within the Apprentice's job role;
- ensuring Apprentices are ready to take the EPA;
- providing CILEx with feedback on the EPA process, as required by the ESFA
- providing CILEx with an assurance that the Apprentice gives permission for CILEx to apply to the ESFA for the certificate on their behalf.

You may wish to delegate some of these responsibilities to a Training Provider. CILEx will be able to provide guidance and support on the requirements for facilitating the delivery of the EPA. Your key CILEx contact will be able to provide further information.

Training Provider Responsibilities

You will have chosen your Training Provider from the Register of Apprenticeship Training Providers (RoATP). The Training Provider has a significant role in Apprenticeship delivery, including confirmation of the learning plan and identification of the areas of law and practice relevant to each Apprentice. This is key information which CILEx will need in the early stages of the Apprenticeship, as it will provide confirmation of the Apprentice's suitability for the Paralegal Apprenticeship and alert CILEx to the areas of law and practice which should be covered in the EPA. The Training Provider is also responsible for channelling the funding from the Employer to CILEx.

Training Providers must be approved on the RoATP and will be required to enter into a service agreement with CILEx to ensure that funds are allocated properly. The signing of the service agreement will take place at the start of the Apprenticeship.

Fees

Fees will be reviewed annually. You can find the current EPA fees for the Paralegal Apprenticeship on the [Fees and Resources](#) page. You will be invoiced for the EPA fee in two stages: the first payment of £100 is due when you register your Apprentice. The second payment for the remaining amount is due when you confirm your final EPA date.

Registering Apprentices

Your chosen Training Provider should notify CILEx of your intention to enter Apprentices for the Paralegal EPA by completing the initial registration form at the start of the Apprenticeship programme. The information required includes:

- Apprentice details;
- the Apprenticeship standard for which EPA is required;
- Employer details;
- Training Provider details;
- Apprentice learning start date;
- estimated Gateway date;
- estimated EPA date (when the Apprentice is likely to be ready to take the EPA);
- area(s) of relevant law and practice underpinning the Apprenticeship;

You will receive a confirmation letter, setting out key information, including:

- the name of your key CILEx contact;
- EPA arrangements;
- additional CILEx services that are available to support Employers to facilitate EPA delivery.

You should confirm the final EPA date with CILEx at least 4 months beforehand. This will ensure that a suitable EPA is available by the time the Apprentice is ready to take their EPA.

Training Provider Service Agreement

CILEx will invoice the Training Provider for the registration fees and will send a service agreement to the Training Provider.

The service agreement will confirm that CILEx is delivering the EPA on your behalf and the Training Provider is acting as the ESFA agent in providing payment to CILEx for the EPA. CILEx will require that the appropriate arrangements and resources are in place to facilitate EPA delivery.

Applying for Membership

Apprentices are able to apply for CILEx membership, although this is not a requirement for the EPA. Being a member of the CILEx is a valuable asset in helping Apprentices to develop in their legal career. There are a number of membership grades open to Apprentices, all of which will provide access to a great range of member benefits and services. More information can be found [here](#).

Membership fees are additional to the Apprenticeship registration fee and are not covered by Apprenticeship levy funding. However, there is a lower EPA fee for those Apprentices who are members, which takes into account reduced administration required to register an Apprentice. In order to be eligible for the reduced, CILEx member fee, the Apprentice will need to be a registered member of CILEx prior to invoice for the EPA being produced.

More information on other [membership benefits](#) available and how to apply for membership can be found on our [website](#). CILEx would welcome the opportunity to discuss CILEx membership options with you.

Questions about Membership?

Contact our Employer Solutions team today!

01234 845727

employersolutions@cilex.org.uk

or on Twitter: #CILExHelp

Software Requirements for Delivering the End-Point Assessment

CILEx is committed to making the best use of technology in assessment delivery, as this not only makes the process of assessment delivery easier, but it also helps to cut costs. We utilise the latest software platforms for delivery of the Paralegal EPA: OneFile is used for the upload and delivery of the Portfolio, Surpass is used for delivery of the Timed Assessments and Zoom is used to conduct the Interview. All these systems have been highly tested and are market leaders in assessment delivery.

OneFile

OneFile is an online system that enables Apprentices to upload evidence for their Portfolio and to keep track of progress. The system allows you and your Training Provider to log in so that you can monitor your Apprentice's progress. You and your Training Provider will also be able to input information, including statements and comments. You can provide feedback to the Apprentice before the Portfolio is submitted. OneFile is currently accessed via a web browser and does not require any downloads to function.

OneFile login details will be made available to you, your Training Provider and your Apprentice at the start of the Apprenticeship. OneFile account details will automatically be sent to your Apprentice prior to Gateway; however, they can request to have a licence to access OneFile for up to two years during their Apprenticeship if required.

Gateway Review

At the point that you submit the Portfolio you will also be asked to confirm that all the Gateway requirements have been met. This is known as the Gateway Review.

The Gateway requirement confirms that checks have been carried out to ensure the Apprentice:

- is competent in their role;
- has achieved maths and English qualifications at level 2 - certificates will need to be uploaded on to OneFile;
- has completed the Apprenticeship in line with the minimum requirements of 12 months;
- has completed the Portfolio with evidence to show that each of the outcomes in the Paralegal Standard has been met.

You, the Training Provider and the Apprentice will be required to sign a Gateway Declaration form and upload it to OneFile confirming that the Gateway requirements have been met. It will also confirm that everyone involved feels that the Apprentice is ready to take their EPA, the pathway of the EPA, that the Apprentice has read and agreed to the *EPA Apprentice Assessment Regulations* and that they understand that the interview will be recorded at all times.

The Gateway requirements must be met before the Apprentice can proceed to the EPA. This is the point at which the 16-week EPA period begins.

CILEx will undertake the required Gateway checks and will notify you to confirm that the Apprentice can proceed to the EPA. In addition to the Gateway Review, you and/or the Training Provider must also submit a signed IT declaration, that confirms that all equipment and software required for the EPA has been tested and is working correctly. The Invigilator Declaration form will also need to be submitted, stating the contact details of the invigilator and listing any potential conflicts of interests. Without these additional declaration forms, CILEx will be unable to arrange the EPA.

The dates for the Interview and for the Timed Assessments can then be confirmed once all required documentation has been completed and submitted to CILEx.

All declaration forms, regulations and guidance material can be found on the [Apprenticeship Resource Page](#).

Interview

The purpose of the Interview is to enable the End-Point Assessor to discuss the evidence, including any gaps or areas that need clarification and to confirm the Apprentice's knowledge, understanding and competence in relation to meeting the Paralegal Standard. The Apprentice will have the opportunity to demonstrate full understanding of the Paralegal Standard, drawing on the evidence in their Portfolio.

The Interview will last between 40 – 55 minutes and will be delivered remotely.

Preparing the Portfolio

The Training Provider will play a key role in preparing the Apprentice's learning plan and in providing support to help them build up their Portfolio. The Apprentice is required to show that they meet all the outcomes in the Paralegal Standard through evidence in their Portfolio. The Portfolio is not assessed but will support the Interview.

The Portfolio should show:

- evidence that the Paralegal Standard has been met in full;
- evidence that is relevant and meets the outcomes;
- evidence that is contextualised through the relevant area(s) of law and practice;
- sufficient evidence for each outcome to show that the Apprentice is working consistently to the standard;
- evidence that you have reviewed the Apprentice's progress;
- clearly where the evidence is to be found for each of the outcomes.

Types of Evidence

Apprentices will be expected to include a range of evidence, taking into account their individual circumstances/job role and the learning outcomes. It is essential that all of the evidence shows a clear and direct association with the Apprentice and their work. Some evidence is applicable to more than one criterion, so they will need to reference the work accordingly in OneFile. It is strongly advisable that the Apprentice meets each outcome at least twice, as this will strengthen the demonstration of their competence overall.

The following is a selection of possible evidence that the Apprentice might choose to use in their portfolio. This is not an exhaustive list and serves as guidance only.

Work Product

- memoranda;
- attendance notes;
- statements of cases in a litigation matter;
- case evaluation studies;
- relevant emails to or from colleagues;
- letters to clients or other relevant parties.

Personal Statements

- their own written account of what they did in a particular situation or case, which may be supported by additional evidence. It is important that they include their own reflections within the account, thereby demonstrating the development of skills, knowledge and behaviours.

Assignment/Project/Reports involving Research

- certificates of proficiency
- newsletters and publications (with annotations or related notes)
- feedback from clients
- photographs (with annotations or related notes)
- procedures documentation (with annotations or related notes).

Confidentiality

You will be aware that confidentiality is an important consideration. However, this should not necessarily limit the evidence which the Apprentice produces in their portfolio. Commercially sensitive or confidential information can be presented anonymously. Documents containing commercially sensitive or confidential information **must** be redacted (edited) but the substance of them must remain recognisable as evidence.

Submitting the Portfolio

When you are confident that that the Apprentice is working consistently to the level or above of that set out in the Paralegal Standard and the Portfolio meets the above requirements you will need to submit the Portfolio electronically through CILEx's e-portfolio system, OneFile. Before you submit the Portfolio, OneFile will ask you to confirm that it is complete and that it clearly shows how each outcome has been met. This is part of the Gateway review process.

Timed Assessment

The Timed Assessment is in two parts and comprises in-tray tasks, which assess an understanding of the relevant area of law as well as the application of legal practice. The tasks require problem solving and drafting skills to be applied within the relevant area of law and practice.

For example, a Paralegal working in Conveyancing practice will be required to solve a problem and draft a document related to Land Law. The tasks will require knowledge and understanding of both Land Law and Conveyancing and the Apprentice will need to be able to apply this knowledge and understanding, together with problem solving and drafting skills to complete the tasks:

- Timed Assessment 1 – Law and Problem Solving;
- Timed Assessment 2 – Legal Practice and Drafting.

Delivering the Timed Assessment

Each Timed Assessment will be:

- scenario-based, with instructions issued 3 weeks in advance to enable the Apprentice to carry out research; scenario-based
- invigilated;
- 1.5 hours in duration;
- completed via the Surpass e-assessment platform at an external test centre.

The Timed Assessment must be delivered in accordance with the CILEx instructions and guidance, which can be found on the [Apprenticeship Resource Page](#).

The Timed Assessment can be taken either at the Apprentice's place of work or at the Training Provider's premises. Further information about the requirements for hosting the Timed Assessment will be forwarded once you confirm the final EPA dates.

Re-sits and Re-takes

If an Apprentice fails any component part of the End-Point Assessment they can re-sit that component. A re-sit does not require further learning. The Apprentice can add further evidence to their portfolio and will be able to re-use the same Advance Material from their first attempt.

If they fail all parts of the EPA (e.g., Timed Assessment 1 & 2 and the Interview), then further development must be provided prior to a re-take. A re-take requires the Apprentice to undertake further learning and so they would have to go through the Gateway review again. New advance materials will be issued to the Apprentice for their Timed Assessments and they will be allowed to submit further work as part of their portfolio.

For both a re-sit and a re-take, the Apprentice will be re-assessed on all the Standard Outcomes (not just those the Apprentice failed). All re-sits/re-takes must be taken within 12 months of the results being released and there is no limit to the number of re-sits or re-takes within this period.

The maximum grade awarded to a re-sit/re-take will be a pass, unless CILEx identifies exceptional circumstances accounting for the original fail. An Apprentice cannot retake any part of the EPA in order to increase their grade from a Pass to a Distinction.

Further charges will apply to any resit undertaken and must be paid in addition to the initial EPA charge. Please refer to the fees table on the [Resources page](#) of the CILEx website for the most up to date list of fees.

Grading

The Paralegal Apprenticeship is graded:

- Pass;
- Distinction;
- Fail.

The grade is determined as follows:

- 50% of the grade will be determined by the Interview;
- 50% of the grade will be determined by the Timed Assessment.

Apprentices must pass both parts of the EPA in order to successfully complete the Apprenticeship.

Appeals

If you wish to appeal your grade, you should refer to the CILEx appeals procedure, which can be found on the [Apprenticeship Resource Page](#).

Certification

When the Apprentice has met the Paralegal Standard, CILEx will apply to the Education and Skills Funding Agency (ESFA) for a certificate to be issued to you, as the Employer.

Policies and Procedures

CILEx has produced policies and procedures to support the EPA - these can be found on the [Apprenticeship Resource Page](#).

Additional Services

CILEx is able to offer additional support to Employers in order to meet their specific needs. Additional support may include, for example, assistance with recruitment, and CILEx membership packages. We welcome enquiries from Employers.

Need help? Have a query?

Contact our End Point Assessment team today!

01234 845727

epa.registration@cilex.org.uk