

Professional Accounting/Taxation Technician

① What the role entails

Individuals in the role of a Professional Accounting/Taxation 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. The role may exist in an accounting practice, a professional services company, HMRC or the accounting function of a business or other organisation.



② On-programme assessment

The apprentice must achieve the following on-programme assessment requirements prior to Gateway:

- Completion of professional exams and/or work-based assessment
- Level 2 English and maths.



③ Gateway requirements

The decision to take an apprentice through Gateway is made between the employer, Independent Training Provider and apprentice. The apprentice must have completed all of the on-programme elements before they enter Gateway, including the completion of a Portfolio of Evidence.



④ End-Point Assessment

The EPA for Professional Accounting/Taxation Technician contains 2 methods of assessment as outlined below:

Portfolio of Evidence including Reflective Statement

The Portfolio of Evidence demonstrates competence in the Knowledge, Skills and Behaviours (KSBs) identified in the standard, which have been gathered from practical experience in the workplace. The apprentice must then produce a Reflective Statement that reflects on this Portfolio, either through a written statement, presentation or structured discussion with an Independent End-Point Assessor (IEPA). Written statements should be 2000 words (+/- 10%) and presentation or discussion-based statements will last for 1 hour (+/- 10%).

Grade Weighting - the Portfolio of Evidence with Reflective Statement is ungraded above a Pass. To be awarded a Pass, the apprentice must achieve competence in all KSBs requirements of the standard.

Role Simulation

Apprentices will be given pre-seen information about a fictitious organisation 4 weeks prior to the Role Simulation being sat. On the day of the assessment, the apprentice will be presented with further information about the fictitious organisation and will be asked to complete a series of short tasks. The Role Simulation will be marked out of 100 marks and will last for 2 and a half hours.

Grade Weighting - The Role Simulation is graded Fail, Pass or Distinction. The Pass mark for the Role Simulation is 70%. The apprentice must achieve a mark of 90% or higher to achieve a Distinction.

⑤ Grade aggregation table

Component	Grading		
Portfolio and Reflective Statement	If an apprentice fails any assessment, the EPA will be deemed an overall Fail	Pass	Pass
Role Simulation		Pass	Distinction
Final Grade	Fail	Pass	Distinction

⑥ Completion and certification

Once the IEPA verifies the apprentice has successfully completed all EPAs, NCFE will activate certification. Working with the apprenticeship certificate issuing authority, we'll ensure the apprentice receives their certificate.



⑦ What next?

Completion of the Professional Accounting/Taxation Technician EPA may lead to the apprentice receiving credits towards the completion of Chartered Accountancy/Taxation qualifications provided by the relevant professional bodies. It may also result in credits being awarded towards relevant undergraduate degree programmes.

Why choose EPA Plus?

We are an approved End-Point Assessment Organisation (EPAO) specialising in EPA delivery across Health, Education & Care and Business apprenticeship standards. EPA Plus offers a flexible and reliable EPA solutions supported by sector expertise, guidance documents and proactive service and support.