

EPA FEES AND INVOICING POLICY

Introduction

This document sets out the fees and invoicing arrangements for Excel Me customers using its End-point Assessment (EPA) service. It covers all fees charged by Excel Me and invoices that are issued by its finance department for EPA-related products and services.

Responsibility

The Head of Apprenticeships is accountable for monitoring and implementing this policy and its impact. If the fees described within this policy are changed in any way as part of this review, Excel Me will seek to ensure that any changes in approach are presented to its customers at least three months in advance of that change, and that any new fees associated with those changes taking effect will be made visible on the Excel Me website in order to satisfy purchasers' planning requirements by providing a sufficient lead-in time. Where such information cannot be provided or made available within this timescale, Excel Me will instead provide potential purchasers with, or make available to them, information that is sufficient to give a reasonable indication of its likely fees, together with a clear statement to make potential purchasers aware that this information is only indicative.

Pricing Policy

It is the policy of Excel Me to maintain a pricing structure that:

- Is fair and appropriate
- Is clear and transparent
- Provides value for money to customers
- Adheres to the requirements of its regulators.

Fees

Excel Me does not charge an upfront recognition fee for its EPA services.

Fees for EPA services are applicable to the following:

- End-point Assessment fees (per standard)
- Cancellation fees (per assessment component)
- Reassessment fees (per assessment component).

Information

Information on Excel Me fees for products and services related to its EPA service is available to be viewed via the details below. For information, details on specific charges are outlined here:

End-point Assessment fees

Fees are charged per apprentice as outlined within each training provider's End-point Assessment Agreement and split into 'registration fee' and 'gateway fee'. Where an apprentice withdraws after registration, the gateway fee will not then be charged; however, that registration may be eligible for transfer to another apprentice (please see Apprentice Transfers below).

Cancellation fees

Fees for cancelled assessments or no-shows are charged per assessment component as detailed in the Excel Me Cancellation, resit and retake Policy.

Reassessment fees

Where reassessment (either via resit or retake) is required, fees are outlined per assessment component via the Excel Me website. Additional information can be found via the Excel Me Active I Cancellation and Reassessment Policy.

Apprentice transfers

Should an apprentice leave their apprenticeship having been registered with Excel Me for EPA, training providers are entitled to transfer their registration to a new apprentice, on the same apprenticeship standard, within three months of the withdrawal date of the withdrawn apprentice. To be eligible for the transfer, the withdrawn apprentice must have initially been registered with Excel Me within three months of their official apprenticeship start, and the withdrawal must be made prior to gateway declaration. Transfers that meet these criteria are facilitated at no charge, with the registration fee transferring to the new apprentice. Where these criteria are not met, all charges will apply for newly registered apprentices. All fees outlined above are non-refundable.

Information

Excel Me will invoice training providers at the end of each month of the transaction occurring – either End-point Assessment fees triggered by activity on its apprenticeship management system (TALUS) because of a cancelled assessment, or on request/authorisation from the training provider for other charges.

All invoices will be sent to training providers' finance departments unless instructed otherwise. If an alternative contact is required to receive these, please advise Excel Me via the details provided at the end of this policy. Each invoice will contain details of:

- The product/service provided
- The VAT amount, if chargeable (proof of exemption is required if applicable)
- Active IQ's payment terms.

Upon receipt of the invoice, payment should be received within 30 days of the invoice date, or such other date as may be agreed by Excel Me in writing. On receipt of payment, Excel Me will update its records to indicate full payment has been received. Failure to satisfy invoices due for payment may result in the withholding of services and/or access to systems and resources, which could ultimately result in the termination of the End point Assessment Agreement between the two parties

Excel Me will exercise its right to claim interest and compensation for debt recovery costs in accordance with the law of England and Wales if payment is not made according to its terms. End-point Assessment fees are invoiced in two stages. Unless otherwise stated, this will be as follows:

- Registration fee: 25% of the End-point Assessment fee upon apprentice registration (this should be within three months of an apprentice's official start date, as stated in their ILR)
- Gateway fee: 75% of the End-point Assessment fee upon gateway, denoting the apprentice is ready for assessment.

All other fees are charged as single transactions. For queries about any aspect of an invoice, please contact Excel Me via the details below. Invoices will remain payable notwithstanding any query or complaint in the absence of express agreement to the contrary.

Record Keeping

Invoice records will be kept for a period of six years.

Excel Me Contact Details

Excel Me, Anchor House, Birch Street, Walsall, West Midlands, WS2 8HZ

Tel: 01922 645097

Opening Hours: Monday to Friday 8.00-16.00

Website: www.excelme.co.uk

Email: info@excelme.co.uk