

EPA Success: How to Prepare and Perform with Confidence

Welcome everyone to this workshop on preparing for your End Point Assessment, or EPA.

By the end of today, you'll know exactly what to expect at EPA, how to prepare for the scenario demonstration, and how to shine in your professional discussion.

We'll use a mix of presentation, examples, practice tasks and even a quiz to keep things interactive.

Remember – this is about building your confidence so that nothing on EPA day comes as a surprise.

- ☰ **Module 1 Welcome and Objectives**
- ☰ **Module 2 Understanding EPA**
- ☰ **Module 3 Scenario Demonstration**
- ☰ **Module 4 The Professional Discussion**
- ☰ **Example Scenario Demonstration**



Frequently Asked Questions



Quiz



Course Summary

Module 1 Welcome and Objectives



Objectives

Intent: To introduce learners to the EPA process, the scenario demonstration and how best to prepare for this.

Implementation: Via presentation, practical demonstration, group activities and a quiz.

Impact: By the end of this workshop, you will:

- Be able to describe the EPA process
- Understand how best to prepare for the scenario demonstration
- Understand what is assessed at EPA
- Complete example assessments

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Welcome and Course Objectives

Welcome to the course. This course is designed to help you prepare for your End Point Assessment (EPA). By the end of the course, you'll know exactly what to expect and how to prepare for both the Scenario Demonstration and the Professional Discussion. We'll use a mix of presentations, examples, practice tasks, and quizzes to make the learning experience interactive and engaging.

The goal of this course is to build your confidence so that nothing on EPA day comes as a surprise. You'll learn how to prove your skills and demonstrate that you're ready for

the next step in your career. Through preparation, you'll also develop valuable skills such as problem-solving under pressure, explaining your choices clearly, and reflecting on what you've learned—skills that are highly valued by employers.

By the end of this course, you will be able to describe the EPA process, understand how to prepare for the Scenario Demonstration, and know what is assessed during EPA. You will also practise with example scenarios and test your knowledge through quizzes and activities.



Complete the content above before moving on.

What do you want to do next?

Starter: Career Aspirations

- What would you like to do on completion of your apprenticeship?
- What additional skills and knowledge would you like to learn?
- Do you have any career aspirations or plans?





Complete the content above before moving on.

Reflection: Your Learning Journey

Starter: Your Learning Journey

- What skills and knowledge would you like to learn more about?
- Do you have any plans for future learning?



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Complete the content above before moving on.

Well done – you've set your own goals and thought about where you're heading.

In this lesson, you covered:

- Why EPA matters.
- What this course will help you achieve.
- Your own career aspirations and learning journey.

Next, we'll dive into the detail: What is EPA and how does it work?



Complete the content above before moving on.

What is the primary purpose of the End Point Assessment (EPA)?

- To provide a detailed overview of your career aspirations
- To help you identify areas for improvement in your learning journey
- To teach you new skills for your professional development



To evaluate your readiness for the next step in your career

SUBMIT



Complete the content above before moving on.

Module 2 Understanding EPA

What is EPA?

- EPA stands for End Point Assessment
- The EPA occurs at the end of your apprenticeship, it is used to assess your competency in the apprenticeship standards and to determine your grade
- EPA is comprised of two methods:
 - **Assessment method 1: Scenario Demonstration with questioning**
 - **Assessment method 2: Professional Discussion underpinned by a portfolio**



What is EPA?

EPA stands for **End Point Assessment**.

It happens at the **end of your apprenticeship** and decides your final grade.

EPA isn't a memory test – it's about showing what you can actually *do* with your skills in real-world tasks.

Think of it like a **driving test**:

- There's a practical part (showing your skills).
- And a discussion part (explaining your understanding).

Why EPA matters

EPA is important because it:

- Proves you've met the apprenticeship standard.
- Shows employers you can apply your skills at work.
- Gives you a final grade that reflects your abilities.

It's not designed to trick you – it's designed to let you show off what you know and can do.

The Two Parts of the EPA

EPA has two main parts

Scenario Demonstration with Questioning (Audio below)

Let's take a closer look at the **Scenario Demonstration**.

This part of the EPA is your chance to **show the assessor how you actually use your skills in practice**. It's not about theory, and it's not about remembering definitions – it's about putting your knowledge, skills and behaviours into action, just as you would in your job role. You'll be given **two separate scenario-based tasks** to complete remotely:

- The first task focuses on **data gathering** – bringing together information from different sources, checking it, and making sure it's ready to use.

- The second task focuses on **data analysis and validation** – where you dig into the data, look for patterns, and check the quality and accuracy.

For each demonstration, you'll have **45 minutes** to complete the task. That means time management is really important – you'll need to balance working carefully with working efficiently.

At the start of each demonstration, you'll be given a **short written description** – about 250 words – that explains the scenario. This will set the scene and tell you what you need to do. Alongside this, you may be given **extra documents or data files**, plus clear instructions on how to access them.

One of the key things to remember is that you are encouraged to '**think aloud**'. That means talk through what you're doing as you do it. For example: '*I can see some missing values here, so I'm going to check whether that's a formatting issue or missing data.*' By speaking your thought process, you show the assessor your reasoning and problem-solving, even if you don't get everything finished in time.

Finally, once you've completed the demonstration, the **assessor will ask you some follow-up questions**. These questions are not designed to trip you up – they give you a chance to explain your approach, talk about anything you would have done if you had more time, and really show your understanding.

So in short: two tasks, 45 minutes each, a scenario description with supporting documents, think aloud as you work, and then answer questions at the end. This is your opportunity to demonstrate your real-world skills in action.

Assessment method 1: Scenario Demonstration – what is covered?

- The Scenario Demonstration provides an opportunity to demonstrate a subset of knowledge, skills and behaviours of the apprenticeship standard
- You will be allocated two scenario-based demonstrations to complete remotely:
 - The first on data gathering
 - The second on data analysis and validation
- You will have 45 minutes to complete each demonstration.
- You will be provided with a 250-word description of the scenario, along with any additional documents you'll need and clear instructions on how to access them.
- You are encouraged to 'think aloud' throughout the process.
- The assessor will ask questions once you have completed the assessment

Discussion Underpinned by a Portfolio (Audio below)

Now let's talk about the **Professional Discussion**.

This is a **two-way conversation** between you and your assessor. Its purpose is to give you the opportunity to explain your knowledge, skills and behaviours in more depth. It's not a test where you're put on the spot – it's a structured discussion that allows you to talk about your real work.

Before the assessment takes place, the assessor will receive your **portfolio of evidence**. They get this at least **10 days before** your Professional Discussion. This gives them time to go through your projects, examples and reflections in advance, so they're ready to ask you meaningful questions.

The discussion itself will last for around **60 minutes** – so about an hour. During that time, both you and the assessor will have access to your portfolio. That means you can **refer to specific projects or evidence** when answering questions. For example, if they ask how you've handled a data validation task, you can point directly to a project in your portfolio that shows this.

The assessor will ask at least **10 open questions**. Open questions are ones that encourage you to explain, reflect and give examples – not just give a 'yes' or 'no' answer. For instance, instead of asking '*Did you clean the data?*' they might ask '*Tell me about a time you had to clean data – what steps did you take and why?*'

The key thing to remember is that the Professional Discussion is your opportunity to:

- Showcase your experience.
- Explain your thinking behind the work you've done.
- Reflect on what you've learned and what you'd do differently next time.

If you prepare well, this can be a really positive and rewarding part of your EPA.

Assessment method 2: Professional Discussion- what is covered?

- A two-way discussion between the apprentice and the assessor to provide assessment of understanding knowledge, skills and behaviours.
- The assessor will receive your portfolio a minimum of 10 days before the assessment and will review prior to the assessment.
- The professional discussion will last for 60 minutes.
- You and the assessor will have access to the portfolio and you can refer to this when answering questions.
- The assessor will ask a minimum of 10 open questions.



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Both parts give you a chance to showcase your skills.



Complete the content above before moving on.

Grading the EPA

Grading the EPA

- The End Point Assessment (EPA) is made up of two components, each graded separately as **Distinction, Pass, or Refer**.
 - If either component is awarded a **Refer**, the overall result will also be a **Refer** – it's a limiting grade as it limits your overall grade. You will then need to either resit that component or retake the full EPA.
 - If you achieve **Pass** in both components, your overall grade will be **Pass**.
 - If you achieve **Distinction** in both components, your overall grade will be **Distinction**.
 - Any other combination of **Pass** and **Distinction** will result in an overall **Merit**.



Grading Categories

Each part of your EPA is graded as Distinction, Pass, or Refer, determining your overall result.

Refer Outcome

If either part is graded as Refer, your overall result will also be Refer. You must resit or retake the assessment.

Pass Outcome

Achieving a Pass in both parts results in an overall outcome of Pass.

Distinction Outcome

Achieving a Distinction in both parts results in an overall outcome of Distinction.

Merit Outcome

Achieving one Pass and one Distinction results in an overall outcome of Merit.

Grading System Purpose

The grading system ensures your final result reflects the balance of your performance across both parts of the assessment.



Complete the content above before moving on.

The EPA Journey

Step 1

Complete Your Apprenticeship Training

Begin your journey by completing your apprenticeship training, which forms the foundation of your learning and development.

Step 2

Build Your Portfolio of Evidence

Compile a comprehensive portfolio of evidence showcasing your skills, knowledge, and achievements during your apprenticeship.

Step 3

Reach the Gateway

Work with your employer and coach to ensure you are ready to proceed. Once they agree, you will reach the Gateway stage.

Step 4

Take Your EPA

Participate in your End-Point Assessment (EPA), which includes a scenario-based evaluation and a professional discussion.

Step 5

Receive Your Grade

Upon completing your EPA, you will receive your grade, marking the culmination of your apprenticeship journey.



Complete the content above before moving on.

What does EPA stand for?

-
- Every Portfolio Activity
 - End Project Assessment
 - End Point Assessment

SUBMIT

Which of these is NOT part of the EPA?

- Written exam
- Scenario Demonstration
- Professional Discussion

SUBMIT

True or False: EPA is designed to catch you out with trick questions.

- True
- False

SUBMIT



Complete the content above before moving on.

Summary

In this lesson, you learned:

- What EPA is.
- Why it's important.
- The two main parts of the assessment.
- How the EPA is graded
- The journey from training → Gateway → EPA → grading.

Next, we'll go deeper into the first part of EPA: the **Scenario Demonstration** – what it involves and how to succeed.



Complete the content above before moving on.

Module 3 Scenario Demonstration

Let's quickly recap what the Scenario Demonstration involves.

Assessment method 1: Scenario Demonstration – what is covered?

- The Scenario Demonstration provides an opportunity to demonstrate a subset of knowledge, skills and behaviours of the apprenticeship standard
- You will be allocated two scenario-based demonstrations to complete remotely:
 - The first on data gathering
 - The second on data analysis and validation
- You will have 45 minutes to complete each demonstration.
- You will be provided with a 250-word description of the scenario, along with any additional documents you'll need and clear instructions on how to access them.
- You are encouraged to 'think aloud' throughout the process.
- The assessor will ask questions once you have completed the assessment



- You'll complete **two tasks**: one on *data gathering* and one on *data analysis and validation*.
- Each task lasts **45 minutes**.
- You'll be given a **scenario description and data files** to work with.

- Remember to '**think aloud**' as you go – the assessor wants to hear your reasoning.
- At the end, the assessor will ask you follow-up questions about what you did and why.

In short: *Two tasks, forty-five minutes each, scenario + data, think aloud, and expect questions afterwards.*

Keep that structure in mind – it's the backbone of your EPA practical assessment.

Demonstrating Your Work

Assessment method 1: How will I demonstrate the work?

- To demonstrate the work you have completed, you will be asked to submit files at the end of the assessment.
- You will also be advised to complete a log document as you go, where you can detail the actions that you carry out and any comments you have about them.
- The log should be used to detail any actions which you would take in a similar real-life situation but did not have the time or resources for during the simulation.
- The log will also be a useful reference document for your professional discussion, which is a separate part of your overall assessment.



To evidence what you've done, you'll submit:

- The files you worked on.
- A log of your actions and thoughts.

The log is very important. It should include:

- Actions you took during the simulation.
- Notes on things you would have done if you had more time or resources.

This log will also help you later in the **Professional Discussion**, because it captures your reasoning in real time.



Note that the log is no longer required, so you can safely ignore any further references to it,

What you will need

Assessment method 1: What will I need?

- At the start of your assessment, you will be provided with:
 - A 250-word summary of the scenario.
 - Data sets to work on for both demonstrations, in CSV/xlsx file format.
 - An optional log template to fill in as you work.
- To carry out your work, you will also need:
 - A computer with internet access, so that you can reach the files and participate in a virtual call.
 - Your preferred data analysis software.
 - Word processing software to fill out the log template.
 - Original photo ID, e.g. a passport, driving license or identity card.



Drag the element to the correct box, based on if it is provided by the EPAO, or you need to take responsibility for it.

Provided

Scenario description (250 words)

Data files (CSV/Excel)

Provide Yourself

**Computer with internet
access**

**Data analysis software
(Excel, Power BI, Python,
etc.)**

**Original photo ID (passport,
driving licence, ID card)**

What is Assessed (Data Gathering)

What is Assessed - Data Gathering Scenario

- Accessing, formatting, collating, blending and extracting data from multiple sources, in line with current industry standards.
- Locating and migrating data from identified sources.
- Manipulating and linking different data sets, using tools and techniques to identify trends and patterns.
- Presenting data in a format appropriate to the task.
- Summarising and explaining the results of the data gathered.

Distinction Criteria:

- Critically analyses the reasons why data is gathered and the importance of using multiple sources

KSBs Covered: **K2, K3, K6, S1, S2, S4, S5, S6**



In the first part of your Scenario Demonstration, the focus will be on **data gathering**.

This means you'll need to show that you can:

Access and Format Data

Learn how to access, format, collate, blend, and extract data from various sources while adhering to current industry standards. This includes working with spreadsheets, databases, or CSV files to ensure the data is in a usable and consistent format.

Mastering this step is crucial for creating a strong foundation for further data analysis and manipulation.

Locate and Migrate Data

Understand the process of locating and migrating data from identified sources. This involves finding the correct file, system, or database and transferring the data into your chosen working

environment.

Efficient data migration ensures that you have all the necessary information in one place for seamless analysis.

Manipulate and Link Datasets

Develop skills to manipulate and link different datasets using tools and techniques to combine data effectively. This step helps in identifying trends or patterns, such as linking sales data to customer data or hospital admissions to hospital details.

Combining datasets provides deeper insights and supports informed decision-making.

Present Data Effectively

Learn how to present data in a format that suits the task at hand. This includes creating tables, charts, or summaries that are clear and understandable to the end user.

Effective presentation ensures that your analysis is not only accurate but also accessible to your audience.

Summarise and Explain Results

Understand the importance of summarising and explaining the results of your data analysis. It's not enough to produce numbers; you need to demonstrate a clear understanding of their significance.

Providing meaningful interpretations of your findings ensures that your work has practical value and impact.

For learners aiming for a **Distinction**, there's an extra stretch: you'll need to **critically analyse the reasons why data is gathered** in the first place, and explain **why using**

multiple sources of data is so important. In other words, don't just show what you did – explain why it matters.

This task is linked to specific Knowledge, Skills and Behaviours in the apprenticeship standard, including: K2, K3, K6, S1, S2, S4, S5, and S6

So, the data gathering scenario is really about proving you can collect, organise, combine and present data in a professional way – and at the top level, showing that you understand the *why* behind those processes.

What is Assessed (Data Analysis & Validation)

What is Assessed – Data analysis and validation Scenario

- Applying algorithms and basic statistical methods to identify trends in data to audit results.
- Cross-checking and filtering data to identify faults.
- Cleaning, testing and assessing the confidence and integrity of data.
- Identifying opportunities to use automation.

Distinction Criteria :

- Justifies why we undertake crosschecking of data
- Evaluates why we need to identify trends and faults in data

KSBs Covered: **K7, K8, S7, S8, S9, S16**



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The second part of your Scenario Demonstration is focused on data analysis and validation.

Here, you'll need to show that you can:

Apply algorithms and basic statistical methods to identify trends in the data. This is about going beyond simply looking at the numbers — you're expected to use methods such as averages, percentages, or other simple statistical tools to find patterns and make sense of the results.

Cross-check and filter the data to identify faults. This means double-checking that the data is correct, consistent, and free from obvious errors. For example, spotting where dates are in the wrong format or where figures don't add up.

Clean, test, and assess the confidence and integrity of data. It's not enough just to fix problems — you need to make sure the dataset is accurate, reliable, and something you can trust to base decisions on.

Identify opportunities to use automation. This could mean recognising where repetitive tasks, like applying the same formula to multiple columns, could be automated to save time and reduce errors.

For those aiming for a Distinction, there's again an additional stretch:

You'll need to justify why we undertake cross-checking of data — in other words, explain why this step is essential for reliable results.

You'll also need to evaluate why it's important to identify trends and faults in data. This means showing a deeper understanding of the consequences of missing errors or ignoring trends.

This part of the assessment links directly to specific Knowledge, Skills and Behaviours in the apprenticeship standard, including K7, K8,S7, S8, S9, and S16

So overall, the data analysis and validation scenario is all about proving you can analyse data effectively, check its quality, and explain the importance of those checks

in a professional context.

Top Tips

Assessment method 1: Top Tips

- Read the instructions carefully and fully
- Be aware of the time
- Don't worry if you make mistakes, or if things don't work as expected
- Ensure that you are confident using preferred tool for extracting, cleaning, linking, validating and analysing data
- Keep calm



Here are some golden rules for success:

Read instructions carefully

Pay close attention to all instructions to ensure you understand the task and avoid unnecessary mistakes.

Keep an eye on the time

Manage your time effectively to complete tasks within the timeframe. Aim to complete in 35 minutes to allow time for questions

Don't panic if things go wrong

Stay composed and focus on finding solutions when faced with challenges or unexpected issues during the task.

Be confident using your tools

Familiarise yourself with your tools and trust your ability to use them effectively to accomplish the task.

Stay calm and explain your thinking

Maintain a calm demeanor and clearly articulate your reasoning to demonstrate your understanding and approach.

Summary

The Scenario Demonstration is your chance to prove your skills in action. Show your process, think aloud, use your log, and stay calm.

Remember – the assessor is not looking for perfection, but for clear reasoning and professional behaviour.

Module 4 The Professional Discussion

Assessment method 2: Professional Discussion- what is covered?

- A two-way discussion between the apprentice and the assessor to provide assessment of understanding knowledge, skills and behaviours.
- The assessor will receive your portfolio a minimum of 10 days before the assessment and will review prior to the assessment.
- The professional discussion will last for 60 minutes.
- You and the assessor will have access to the portfolio and you can refer to this when answering questions.
- The assessor will ask a minimum of 10 open questions.



The **Professional Discussion** is the second method of your End Point Assessment.

This is a **two-way conversation** between you and your assessor, designed to check your understanding of the knowledge, skills, and behaviours from your apprenticeship.

Here's how it works:

- The assessor will receive your **portfolio at least 10 days before** your EPA. They'll review it carefully ahead of time so they're ready to ask you focused questions.

- The discussion itself lasts for **60 minutes** – about one hour.
- During that time, both you and the assessor will have access to your **portfolio**, and you can use it to support your answers.
- You'll be asked a **minimum of 10 open questions**. These are questions that encourage you to explain, reflect, and give examples, not just answer 'yes' or 'no'.

The key point to remember is that this is a professional conversation. It's your chance to explain your projects, show your reasoning, and reflect on your learning journey."

It's not a **test of memory** – it's your chance to **showcase your work**.

How it works

Assessment method 2: How to prepare?

- Know your work – read and re-read your portfolio.
- Make sure you can expand on and explain work, tasks and projects covered in your portfolio.
- Discuss lessons learned and things you would do differently.
- Have examples of additional work, tasks and projects not in your portfolio that you can discuss.
- Practice with your colleagues, coach and family.



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Let's talk about how you can prepare effectively for your Professional Discussion.

Preparing for Your Professional Discussion

The professional discussion is a critical part of your assessment process. This guide will help you prepare effectively by breaking down the key steps to ensure you present your work confidently and comprehensively.

Step 2

Familiarise Yourself with Your Portfolio

Thoroughly review your portfolio to ensure you are completely familiar with the projects, tasks, and evidence included. When you enter the discussion, nothing in your portfolio should come as a surprise.

Step 3

Be Ready to Expand on Your Work

Prepare to explain your work in detail. Go beyond stating what you did by discussing how you did it, why you chose specific methods, and the impact of your decisions. For instance, if you created a dashboard, explain its design, purpose, and the decisions it supported.

Step 4

Reflect on Lessons Learned

Think about areas where things didn't go as planned or tasks you would approach differently now. Assessors value reflection and honesty, as it demonstrates your ability to learn from experience and improve over time.

Step 5

Prepare Additional Examples

Have extra examples ready to discuss, even if they are not included in your portfolio. This flexibility allows you to address questions about areas not covered in your main evidence, showcasing depth and adaptability.

Step 6

Practice Explaining Your Portfolio

Rehearse discussing your portfolio with a coach, colleagues, or even friends and family. Practicing out loud will help you feel more natural and confident during the professional discussion.

Final Thoughts on Preparing for Your Discussion

By following these steps, you can approach your professional discussion with confidence and clarity. Thorough preparation, reflection, and practice will ensure you effectively showcase your skills and experiences.

So in summary: know your work, explain it clearly, reflect on lessons learned, bring extra examples, and practise until you feel confident. This preparation will make a big difference on the day."

Distinction Level Preparation



For those aiming higher, Distinction-level answers don't just describe what you did – they show depth.

That means:

- Explaining the **reasoning** behind your choices.
- Comparing your approach to alternatives.

- Evaluating the **impact** of your work – how it improved processes, supported decisions, or created value for your organisation.

Examples Approaches to Common Questions

Validating a Dataset

When validating a dataset, start by explaining the dataset and why validation was necessary. For instance, you might work with sales figures or hospital admissions data that require accuracy for decision-making. Next, describe the steps you took, such as checking for missing values, duplicates, inconsistent formats, outliers, or errors. Mention tools like Excel filters, SQL queries, or Power BI checks that you used to ensure thorough validation.

Finally, share the results of your validation process, such as identifying and resolving issues like missing product IDs or duplicate records. Reflect on the importance of this step, emphasizing how it prevents inaccurate data from influencing critical decisions.

Ensuring Data Quality

Maintaining data quality involves implementing specific steps to ensure reliability. These steps include cleaning data by removing duplicates and correcting formats, cross-checking against source systems, and using validation rules or automated checks. Documenting changes for traceability is also crucial to maintain transparency.

Explain why these measures matter, such as ensuring reliable outputs, fostering trusted decision-making, and meeting compliance requirements. For example, setting up validation rules in Excel or using automated scripts can significantly reduce errors and build stakeholder confidence in the results.

Reflecting on Project Improvements

When reflecting on past projects, be honest about challenges and identify areas for improvement. For example, if a project involved manual data validation that was time-consuming, consider how automation could have saved time and reduced errors. Tools like Python or Power Query can streamline processes and improve efficiency.

Additionally, think about planning and stakeholder input. Scheduling validation earlier in the project timeline or involving stakeholders more effectively can help address issues proactively and enhance overall project outcomes.

Applying Statistical Methods

Applying statistical methods can provide valuable insights into datasets. For instance, you might analyze customer satisfaction scores to identify trends over time. Use methods like averages to compare performance across months or correlation analysis to explore relationships, such as between response times and satisfaction levels.

Share the insights gained from these methods, such as helping a service team focus on reducing delays to improve satisfaction scores. Highlight how these statistical approaches contribute to informed decision-making and measurable improvements.



Key tips for all answers:

- Always **name the tool or technique** you used (Excel, SQL, Power BI, Python, etc.).
- Always end with the **value** or **impact** (e.g. "This gave management confidence," "This improved efficiency by 20%").
- Keep answers structured and concise, but reflective.

Summary

The Professional Discussion is your opportunity to shine by talking through your projects and your learning journey.

Remember:

- Be clear and confident about your portfolio.
- Reflect on lessons learned and explain your reasoning.
- Expect at least 10 open questions.
- Treat it as a professional conversation, not a test.

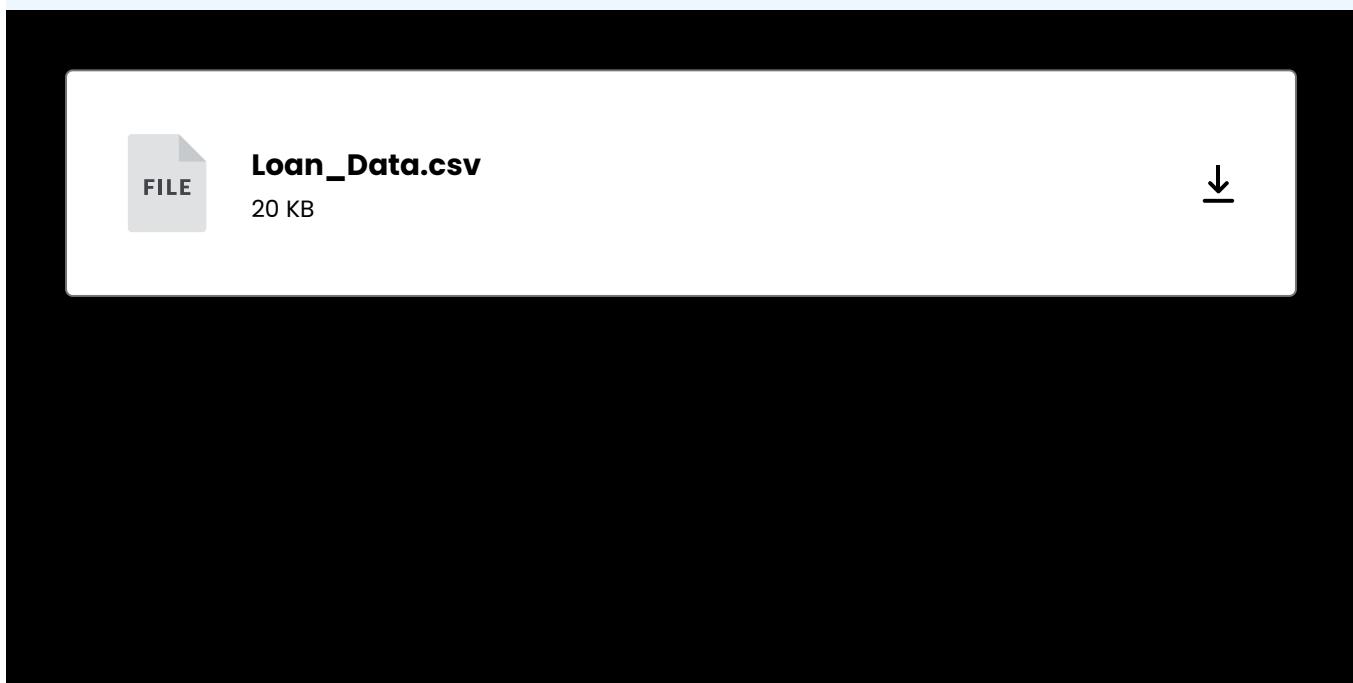
If you prepare well, this part of the EPA can be one of the most rewarding.

Example Scenario Demonstration

You are a Data Technician with Just Money, a small financial company based in the UK. Your line manager has requested that you use an appropriate data analysis tool to extract and manipulate data from multiple sources, remove corrupted data and professionally format and present the imported data in the form of a table and visual representation ready for further analysis.

Use the two datasets provided:

- Loan Data.csv – Contains the latest loan requests.
- Personal Data.csv – Contains personal details of applicants.





Personal_Data.csv

20.5 KB



Scenario 1 (Click to expand)

Task 1 Import and Combine Data

Start by importing the Gender, Married, Dependant, Education, and Self-employed columns from Personal Data.csv into Loan Data.csv. Name the resulting dataset "Loan Request Data."

Use VLOOKUP or XLOOKUP to combine the data based on a shared ID. Ensure that column names are identical and consistent to avoid errors during the merge.



Key Issue with XLOOKUP – dont fall into this trap, and don't panic

Problem

Using **XLOOKUP** to return multiple columns works fine as a spilled array, but if you try to convert that spill directly into a **Table**, it breaks. The spill “snaps back” and only shows one column.

Reason

- A multi-column XLOOKUP creates a **spill** (fills across).
- Excel Tables **don't allow spills** — each column must be filled one value at a time.
- When you press **Ctrl+T** on a spilled range, Excel tries to force the spill formula into the table, which fails.

Solutions

Option 1 – Keep it Live (best for updating automatically)

Do one XLOOKUP per column inside the table.

```
=XLOOKUP([@ID], Source!A:A, Source!B:B) → Name  
=XLOOKUP([@ID], Source!A:A, Source!C:C) → Department
```

This will keep updating when your source data changes.

Option 2 – Make a Frozen Snapshot

If you want to create a table from a multi-column spill:

1. Enter your multi-column XLOOKUP outside a table and let it spill.
`=XLOOKUP(A2:A10, Source!A:A, Source!B:D)`
2. Highlight the whole spilled block and data (**CTRL + A**) and **Copy**
3. Create a new tab in your spreadsheet
4. In this new spreadsheet **Paste Special → Values**.
5. Now press **Ctrl+T** to turn that pasted range into a table.

This version is **static**. It will not update if the source data changes.

Rule of Thumb

- **Want a live table?** → One XLOOKUP per column.
- **Want a quick snapshot?** → Spill → Copy → Paste Values → Convert to Table.

Task 2 Format Numeric Data

—

Format the ‘Applicant Income’ and ‘Loan Amount’ columns to display as currency with two decimal places. Use the Format Cells > Currency option in Excel to apply the formatting.

Before formatting, ensure that the data in these columns is numeric to prevent issues. This step enhances the readability and professionalism of the dataset.

A screenshot of Microsoft Excel showing a context menu for cell C1. The menu is open over the first row of data, specifically over the 'Loan_Amt' column header. The 'Paste Options' submenu is visible, with the 'Values' option highlighted by a red arrow. The main menu bar shows 'Home' is selected. The status bar at the bottom indicates the average value is 146.4121622, there are 593 rows, and the total sum is 86676.

Task 3 Handle Blank Fields

Identify and delete any records that contain blank fields. Use filters or conditional formatting in Excel to locate these blanks efficiently.

Before deleting any data, back up the file to ensure no critical information is lost. This step ensures the dataset remains clean and complete.

The screenshot shows an Excel spreadsheet titled "Loan_Data.csv" with data from rows 1 to 27. The "Format Cells" dialog box is open, specifically the "Notes" tab, which lists various types of differences and precedents. The "OK" button is visible at the bottom right of the dialog.

Loan_ID	Applicant_Income	Loan_Amount	Loan_Amc	Credit_His	Property_	Loan_Status	Gender	Married	Dependen	Education	Self_Employed
LP001002	£5,849.00		36	1 Urban	Y	Male	No	0	Graduate	No	
LP001003	£4,583.00	£128.00	36	1 Rural	N	Male	Yes	1	Graduate	No	
LP001005	£3,000.00	£66.00	36	1 Url	Go To Special			?	Graduate	Yes	
LP001006	£2,583.00	£120.00	36	1 Url	Select				ot Gradu	No	
LP001008	£6,000.00	£141.00	36	1 Url					raduate	No	
LP001011	£5,417.00	£267.00	36	1 Url					Roy differences		
LP001013	£2,333.00	£95.00	36	1 Url					Notes		
LP001014	£3,036.00	£158.00	36	0 Set					Constants		
LP001018	£4,006.00	£168.00	36	1 Url					Formulas		
LP001020	£12,841.00	£349.00	36	1 Set					Precedents		
LP001024	£3,200.00	£70.00	36	1 Url					Dependents		
LP001027	£2,500.00	£109.00	36	1 Url					Numbers		
LP001028	£3,073.00	£200.00	36	1 Url					Text		
LP001029	£1,853.00	£114.00	36	1 Ru					Logicals		
LP001030	£1,299.00	£17.00	12	1 Url					Errors		
LP001032	£4,950.00	£125.00	36	1 Url					Last cell		
LP001034	£3,596.00	£100.00	24	Url					Blanks		
LP001036	£3,510.00	£76.00	36	0 Url					Current region		
LP001038	£4,887.00	£133.00	36	1 Rural	N	Male	Yes	0	Current array		
LP001041	£2,600.00	£115.00		1 Urban	Y	Male	Yes	0	Objects		
LP001043	£7,660.00	£104.00	36	0 Urban	N	Male	Yes	0	All		
LP001046	£5,955.00	£315.00	36	1 Urban	Y	Male	Yes	1	Same		
LP001047	£2,600.00	£116.00	36	0 Semiurban	N	Male	Yes	0	Graduate	No	
LP001050	£3,365.00	£112.00	36	0 Rural	N	Male	Yes	2	Not Gradu	No	
LP001057	£17.00	£151.00	36	Semiurban	N	Male	Yes	1	Graduate	Yes	
LP001059	£17.00	£191.00	36	1 Semiurban	Y	Male	Yes	0	Graduate	Yes	

Task 4 Convert Dataset into a Table

Transform the dataset into a structured table for better organisation and presentation. Use the Insert Table option in Excel to create the table.

Apply a professional table style with bold headers and alternating row colours to improve visual clarity and usability.

Loan_ID	Applicant_Income	Loan_Amount	Loan_Amt_Credit_His_Property	Loan_Status	Gender	Married	Dependents	Education	Self_Employed
LP001003	£4,583.00	£128.00	36	1 Rural	N	Male	Yes	1 Graduate	No
LP001005	£3,000.00	£66.00	36	1 Urban	Y	Male	Yes	0 Graduate	Yes
LP001006	£2,583.00	£120.00	36	1 Urban	Y	Male	Yes	0 Not Gradu	No
LP001008	£6,000.00	£141.00	36	1 Urban	Y	Male	No	0 Graduate	No
LP001011	£5,417.00	£267.00	36	1 Urban	Y	Male	Yes	2 Graduate	Yes
LP001013	£2,333.00	£95.00	36	1 Urban	Y	Male	Yes	0 Not Gradu	No
LP001014	£3,036.00	£158.00	36	0 Semiurban	N	Male	Yes	3+	Graduate
LP001018	£4,006.00	£168.00	36	1 Urban	Y	Male	Yes	2 Graduate	No
LP001020	£12,841.00	£349.00	36	1 Semiurban	N	Male	Yes	1 Graduate	No
LP001024	£3,200.00	£70.00	36	1 Urban				2 Graduate	No
LP001027	£2,500.00	£109.00	36	1 Urban				2 Graduate	Yes
LP001028	£3,073.00	£200.00	36	1 Urban				2 Graduate	No
LP001029	£1,853.00	£114.00	36	1 Rural				0 Graduate	No
LP001030	£1,299.00	£17.00	12	1 Urban				2 Graduate	No
LP001032	£4,950.00	£125.00	36	1 Urban				0 Graduate	No
LP001036	£3,510.00	£76.00	36	0 Urban	N	Female	No	0 Graduate	No
LP001038	£4,887.00	£133.00	36	1 Rural	N	Male	Yes	0 Not Gradu	No
LP001043	£7,660.00	£104.00	36	0 Urban	N	Male	Yes	0 Not Gradu	No
LP001046	£5,955.00	£315.00	36	1 Urban	Y	Male	Yes	1 Graduate	No
LP001047	£2,600.00	£116.00	36	0 Semiurban	N	Male	Yes	0 Not Gradu	No
LP001050	£3,365.00	£112.00	36	0 Rural	N	Male	Yes	2 Not Gradu	No
LP001066	£9,560.00	£191.00	36	1 Semiurban	Y	Male	Yes	0 Graduate	Yes
LP001068	£2,799.00	£122.00	36	1 Semiurban	Y	Male	Yes	0 Graduate	No
LP001073	£4,226.00	£110.00	36	1 Urban	Y	Male	Yes	2 Not Gradu	No
LP001080	£1,442.00	£35.00	36	1 Urban	N	Male	No	0 Not Gradu	No
LP001082	£1,120.00	£36.00	36	1 Semiurban	Y	Female	No	2 Graduate	Yes

Task 5 Add and Format a New Column

Insert a new column called “Monthly Payment” next to the Loan Amount Term column. Clearly label the new column and apply appropriate formatting.

Use Excel’s right-click > Insert Column feature to add the column. This step prepares the dataset for further calculations and analysis.

The screenshot shows a Microsoft Excel spreadsheet titled "Loan_Data.csv". A context menu is open over a table, specifically over the header row. The menu includes options like Cut, Copy, Paste Options, Copilot Suggestions (highlighted with a red box), Insert (also highlighted with a red box), Delete, Clear Contents, Format Cells..., Column Width..., Hide, and Unhide. The table contains data for 530 rows, with columns including Loan_ID, Applicant_Income, Loan_Amount, Loan_Amount_Term, Credit_History, Status, Gender, Married, Dependents, Education, and Self_Employed.

Scenario 2 (Click to expand)

Task 6 Calculate Monthly Payment

Add a formula in the “Monthly Payment” column to calculate the loan amount divided by the term. Use the formula =Loan Amount/Loan_Amount_Term.

Wrap the formula in IFERROR() to handle any missing values gracefully and avoid error messages. This ensures the calculations are robust and error-free.

The screenshot shows an Excel spreadsheet titled "Loan_Data.csv". The formula bar at the top displays the formula =IFERROR([@[Loan_Amount]]/[@Loan_Amount_Term]), "Cannot Calculate)". A formula error dialog box is open over the spreadsheet, showing the IFERROR function with its arguments: Value: @[Loan_Amount_Term] and Value_if_error: "Cannot Calculate". The dialog also includes a note: "Returns value_if_error if expression is an error and the value of the expression itself otherwise." and "Value_if_error is any value or expression or reference." The formula result is shown as 3.55555556. The background spreadsheet contains data for various loan applicants across columns A through M.

Loan_ID	Applicant_Income	Loan_Amount	Loan_Amount_Term	Monthly_Payment	Credit_History	Property_Area	Loan_Status	Gender	Married	Dependents	Education	Self_Employed
LP001003	£4,583.00	£128.00	36	Calculate*)	1 Rural	N	Male	Yes	1 Graduate	No		
LP001005	£3,000.00	£66.00	36		1 Urban	Y	Male	Yes	0 Graduate	Yes		
LP001006	£2,583.00	£120.00	36		1 Urban	Y	Male	Yes	0 Not Graduate	No		
LP001008	£6,000.00	£141.00	36		1 Urban	Y	Male	No	0 Graduate	No		
LP001011	£5,417.00	£267.00	36		1 Urban	Y	Male	Yes	2 Graduate	Yes		
LP001013	£2,333.00	£95.00	36		1 Urban	Y	Male	Yes	0 Not Graduate	No		
LP001014	£3,036.00	£158.00	36		1 Urban	Y	Male	Yes	2 Graduate	No		
LP001018	£4,006.00	£168.00	36		1 Urban	Y	Male	Yes	1 Graduate	No		
LP001020	£12,841.00	£349.00	36		1 Urban	Y	Male	Yes	2 Graduate	No		
LP001024	£3,200.00	£70.00	36		1 Urban	Y	Male	Yes	2 Graduate	No		
LP001027	£2,500.00	£109.00	36		1 Urban	Y	Male	Yes	2 Graduate	Yes		
LP001028	£3,073.00	£200.00	36		1 Urban	Y	Male	Yes	2 Graduate	No		
LP001029	£1,853.00	£114.00	36		1 Urban	Y	Male	No	0 Graduate	No		
LP001030	£1,299.00	£17.00	36		1 Urban	Y	Male	Yes	2 Graduate	No		
LP001032	£4,950.00	£125.00	36		1 Urban	Y	Male	No	0 Graduate	No		
LP001036	£3,510.00	£76.00	36		1 Urban	Y	Female	No	0 Graduate	No		
LP001038	£4,887.00	£133.00	36		1 Urban	Y	Male	Yes	0 Not Graduate	No		
LP001043	£7,660.00	£104.00	36		0 Urban	N	Male	Yes	0 Not Graduate	No		
LP001046	£5,955.00	£315.00	36		1 Urban	Y	Male	Yes	1 Graduate	No		
LP001047	£2,600.00	£116.00	36		0 Semiurban	N	Male	Yes	0 Not Graduate	No		
LP001050	£3,365.00	£112.00	36		0 Rural	N	Male	Yes	2 Not Graduate	No		
LP001066	£9,560.00	£191.00	36		1 Semiurban	Y	Male	Yes	0 Graduate	Yes		
LP001068	£2,799.00	£122.00	36		1 Semiurban	Y	Male	Yes	0 Graduate	No		
LP001073	£4,226.00	£110.00	36		1 Urban	Y	Male	Yes	2 Not Graduate	No		
LP001095	£1,442.00	£35.00	36		1 Urban	N	Male	No	0 Not Graduate	No		
LP001096	£1,750.00	£120.00	36		1 Semiurban	Y	Female	No	0 Graduate	Yes		

Task 7 Count Male and Female Applicants

In cell O2, count the number of male applicants using the formula =COUNTIF(range, "Male"). Similarly, in cell O3, count the number of female applicants.

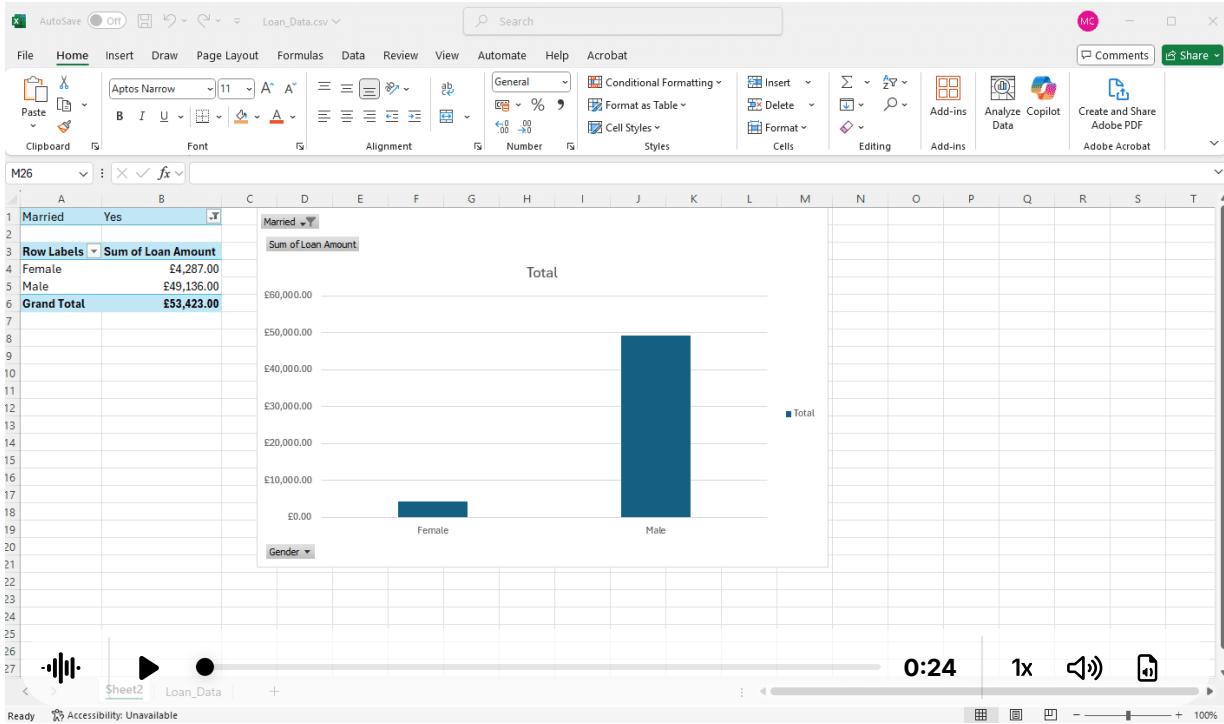
Double-check the spelling and capitalisation of Gender values to ensure accurate results. This step provides insights into the gender distribution of applicants.

The screenshot shows a Microsoft Excel spreadsheet titled "Loan_Data.csv". The formula bar at the top displays the formula =COUNTIF(I:I,"Male"). The spreadsheet contains data for 27 rows, with columns labeled from D to R. The columns include "Loan_Amount", "Term", "Monthly Payment", "Credit_History", "Property_Area", "Loan_Status", "Gender", "Married", "Dependents", "Education", and "Self_Employed". A tooltip for the COUNTIF function is open, showing the range I:I, criteria *Male*, and the result 434. The formula result is also displayed as 434. The status bar at the bottom shows "0:21" and "1x".

Task 8 Create a Chart for Loan Amounts

Create a chart to visualize the total loan amounts for married male and female applicants. Filter the data by Gender and Married = Yes to focus on the relevant subset.

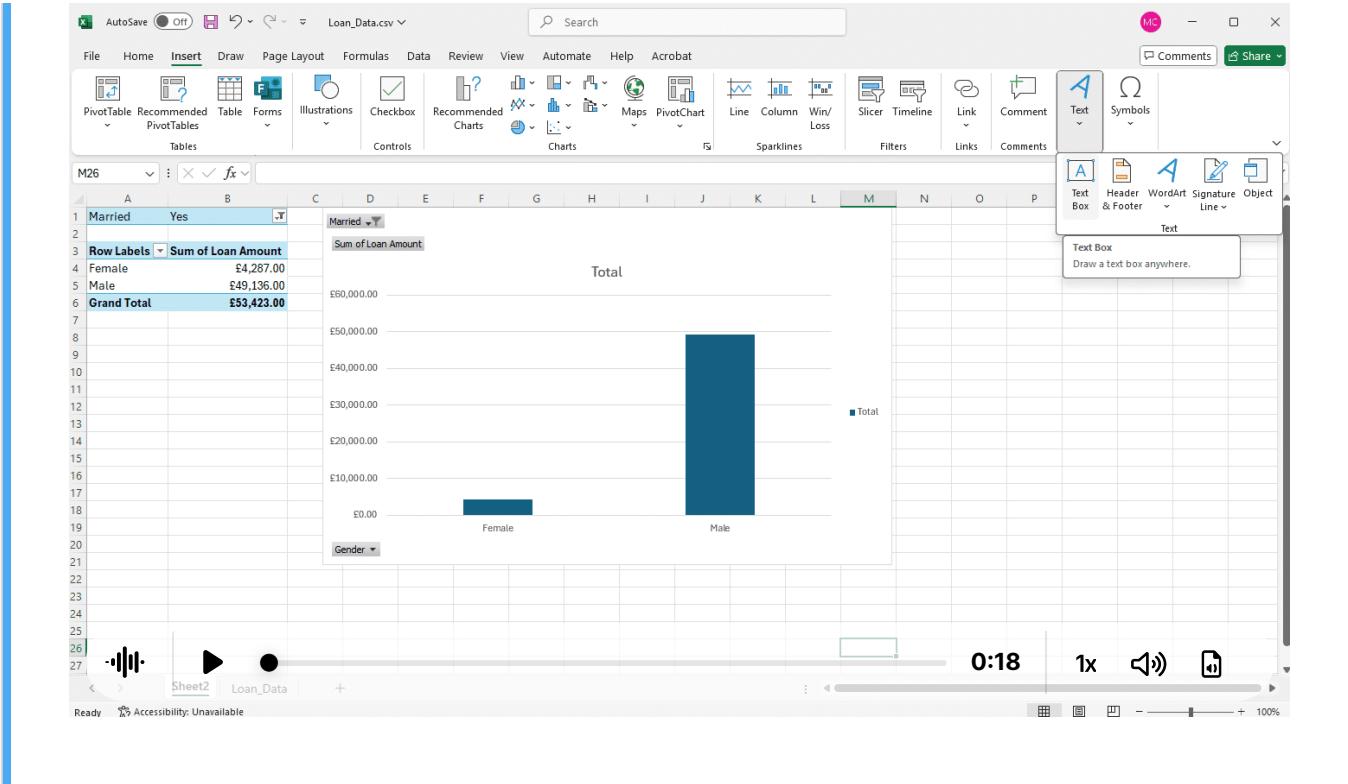
Use Pivot Tables to summarise the totals before creating the chart. This visualisation highlights key trends in the dataset.



Task 9 Summarise Findings

Write a concise summary of your findings beneath the chart. Focus on key insights and trends observed in the data.

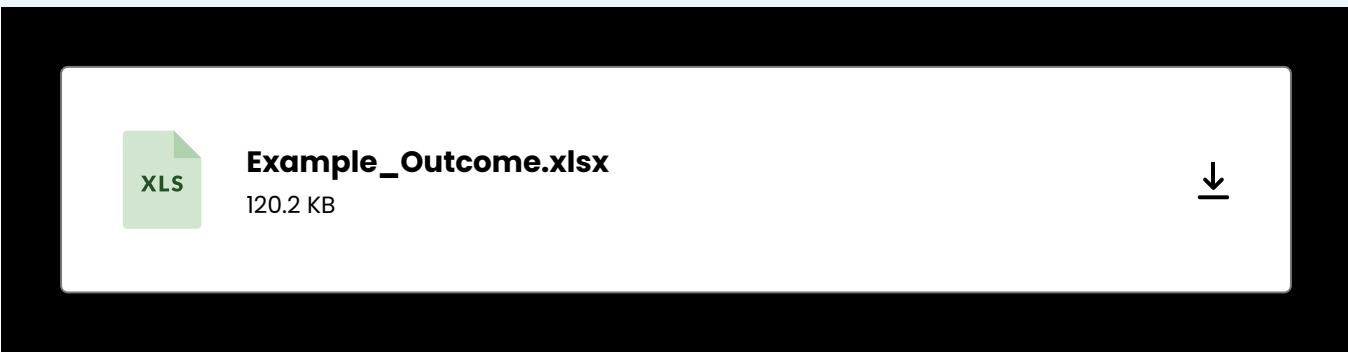
Use bullet points or a short paragraph to present the summary clearly and effectively. This step ensures the analysis is well-documented and easy to understand.



Task 10 Save the Completed File

Save the completed file with all data and visuals intact. Use the Save As option to preserve the formatting and ensure charts remain linked to the data.

This final step ensures the dataset is ready for submission and future reference.



Frequently Asked Questions

What is the EPA?

The EPA is the final assessment of your apprenticeship. It evaluates whether you can apply your knowledge, skills, and behaviours in real workplace situations.

This ensures you are fully prepared for professional challenges.

What are the two parts of the EPA?

The EPA consists of two parts: the Scenario Demonstration with questioning and the Professional Discussion with portfolio.

In the Scenario Demonstration, you complete two practical data tasks under timed conditions, focusing on data gathering and analysis. The Professional Discussion involves a structured conversation with your assessor, where you explain your projects and reflect on your work.

How long does the EPA take?

The Scenario Demonstration includes two tasks, each lasting 45 minutes.

The Professional Discussion takes 60 minutes, providing ample time to showcase your understanding and skills.

What does “think aloud” mean in the Scenario Demonstration?

“Think aloud” means verbalizing your thought process as you work through tasks. For example, you might say, “I can see missing values in this column, so I’ll filter to identify them and decide whether to delete or replace them.”

This approach helps the assessor understand your reasoning and decision-making process.

What happens if I make a mistake in the Scenario Demonstration?

If you make a mistake, don’t panic. The assessor is more interested in your process and how you handle challenges.

Explain what happened and describe what you would do to fix it if you had more time.

How do I prepare for the Professional Discussion?

To prepare, re-read your portfolio to ensure you know your projects thoroughly. Practise explaining what you did, why you did it, and the outcomes.

Be ready to discuss lessons learned, what you would do differently, and practise answering open questions with your coach or colleagues.

How many questions will I be asked in the Professional Discussion?

You will be asked at least 10 open questions during the Professional Discussion.

These questions require detailed answers that go beyond simple “yes” or “no” responses.

Do I need to memorise everything?

No, you don't need to memorise everything. During the Professional Discussion, you can refer to your portfolio, and in the Scenario Demonstration, you'll have access to the scenario description and data files.

What matters most is your ability to understand and apply your skills effectively.

What tools can I use in the Scenario Demonstration?

You can use tools like Excel, Power BI, SQL, or Python—whichever you've been trained on and feel most confident using. However the scenarios will be written with Excel in mind, but the apprenticeship is ultimately platform-agnostic, that is it does not mandate any specific platform or language.

Ensure you can clearly demonstrate your process and reasoning while using these tools.

What makes the difference between Pass and Distinction?

A Pass demonstrates that you can complete the tasks correctly. A Distinction requires going further by explaining your reasoning, evaluating alternatives, reflecting on the impact, and showcasing professional behaviours.

Strive to provide detailed insights and demonstrate a high level of professionalism to achieve a Distinction.

Can I use the Help functions in my application?

Yes, you can use the Help functions, and they can often be really useful if you get stuck or want to double-check something. However, try not to rely on them too heavily. In assessments, the aim is to show *your own* knowledge and ability, not just that you can follow on-screen instructions. Think of the Help tools as a safety net – good to have when you need them, but you should still aim to practise and become confident using the features without needing to look them up every time.

Can I use AI?

Yes, you can. Tools like **Copilot** are now built into Excel, so it's fine to make use of them. However, just like with the Help functions, try not to rely on AI too heavily. In assessments, the goal is to show *your own* knowledge and skills. AI can speed things up or give you a useful starting point, but you still need to understand what's happening in the background and be able to explain it in your own words. Think of AI as an assistant – it can support you, but the real evidence of learning comes from *you*.

Quiz

Let's finish with a quick quiz to check your knowledge – and more importantly, your confidence.

Remember: EPA is not about trick questions; it's about showing the skills you've developed.

If you prepare, practise, and stay calm, you'll be ready to succeed

Question

01/06

What is the primary purpose of the Professional Discussion in the End Point Assessment (EPA)?

- To test your memory of specific facts and figures from your apprenticeship.
- To evaluate your ability to memorize and recite your portfolio content verbatim.
- To determine your ability to work independently without guidance.
- To assess your understanding of the knowledge, skills, and behaviours from your apprenticeship.

Question

02/06

Which of the following is a key preparation strategy for the Professional Discussion?

- Avoid practicing to keep your answers spontaneous.
- Memorize all the questions in advance.
- Know your portfolio thoroughly.
- Focus only on the projects that went perfectly.

Question

03/06

What is the primary purpose of the End Point Assessment (EPA)?

- To test memory through written exams.
- To evaluate practical skills and understanding through real-world tasks.
- To provide theoretical knowledge for future roles.
- To determine eligibility for apprenticeship enrollment.

Question

04/06

What are the key components of preparing for the scenario demonstration and professional discussion?

- Memorizing answers to potential questions.
- Relying on feedback from peers without self-assessment.
- Focusing only on building confidence without preparation.
- Practicing tasks similar to those in the assessment.
- Understanding the format of the assessment.

Question

05/06

Match each main component of the EPA with its specific purpose. This will test your understanding of how each part contributes to the assessment process.



Scenario Demonstration with Questioning



Professional Discussion underpinned by a Portfolio

Show how you use your skills in practice through scenario-based tasks.

Explain your knowledge, skills, and behaviours in depth using your portfolio.

Question

06/06

What is the primary purpose of the Scenario Demonstration in the EPA process?

- To evaluate your teamwork skills in a group setting.
- To assess your ability to memorize theoretical concepts.
- To provide feedback on your career development plan.
- To demonstrate your ability to apply skills in a simulated work scenario.

Course Summary



Thanks for completing the course. You have now seen how the End Point Assessment (EPA) works and what is expected of you in both parts: the scenario demonstration with questioning and the professional discussion supported by your portfolio.

You have explored practical examples of gathering, validating and analysing data, and how to present and explain your results clearly. You have also recognised the importance of being confident with the tools you will use – from data extraction to analysis – so you can demonstrate your knowledge and skills without hesitation.

By this point, you should feel clear about the structure of the EPA, the knowledge, skills and behaviours being assessed, and how to approach each task with confidence and professionalism.

If there is anything you would like to revisit, please speak with your business coach, and make use of the toolkits provided to refresh your skills whenever you need.

Finally, good luck – you have already been showing these skills throughout your apprenticeship. The EPA is your chance to bring it all together and shine.