

ATT PROFESSIONAL TAX TECHNICIAN STANDARD HANDBOOK

TRAILBLAZER APPRENTICESHIP



Practical Tax People
Association of
Taxation Technicians

ATT PROFESSIONAL TAX TECHNICIAN STANDARD HANDBOOK

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This handbook is intended as a guide to the following participants in the ATT Professional Tax Technician Standard:

The Apprentice

The guide will outline how your programme is structured, a chronological outline of how your programme will progress and explain key documents in the process. You will also see the Skills and Behaviours you will be expected to demonstrate during the programme and guidance as to how you can provide evidence for that.

The Employer

The guide will outline how your employee's programme will come together and provide an indication of your role in the support framework they will require and the assessment of their portfolio.

The Training Provider

The guide provides an indication of the milestones you will look to support the apprentice to achieve, guidance on how to bring together a training log with them and how to support the apprentice to begin providing evidence for their portfolio to demonstrate the required Skills and Behaviours.

The Independent Assessor

The guide provides an overview of key assessment principles to ensure a safe and consistent assessment decision, along with marking guidance for each of the suggested learning outcomes within each Skill and Behaviour.

Roles and Responsibilities:

Employer	<ul style="list-style-type: none">- Creates opportunities for the Apprentice to carry out work and produce outcomes- Undertakes regular reviews of development plan with Apprentice- Provides appropriate training to Apprentice in preparation for the Role Simulation- Attends regular progress reviews
Apprentice	<ul style="list-style-type: none">- Selects evidence for Portfolio- Prepares Portfolio and completes Reflective Statement- Completes Role Simulation- Attends regular progress reviews
Assessment Organisation	<ul style="list-style-type: none">- Provides a framework for assessing the portfolio and role simulation- Writes, administers and assesses the role simulation- Verifies the assessment decision of the independent assessor on the portfolio- Provides a governance framework for independent assessors to ensure consistency
Independent Assessor	<ul style="list-style-type: none">- Reviews the Apprentice's Portfolio and Reflective Statement- Provides a collective recommendation on competency to the Assessment Organisation
Training Provider	<ul style="list-style-type: none">- Supports the Apprentice to develop/evidence required Skills, Knowledge and Behaviour- Supports the Apprentice and Employer to complete the training log- Supports the Apprentice with portfolio building and reflective statement- Makes recommendation to assessment organisation when portfolio is complete

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Grading:

There will be two successful grades for the Apprenticeship: 'Pass' and 'Distinction'. The 'Distinction' grade can only be determined following the Role Simulation, which forms part of the End-point Assessment. This is considered to be the most reliable assessment within the End-point stage to provide an entirely objective comparison of competence between individual Apprentices.

The requirements for 'Pass' and 'Distinction' grades for the End-point Assessment are as follows:

To be awarded a 'Pass', Apprentices must achieve the following:

- Competence in all Knowledge, Skills and Behaviours requirements of the Standard via their Portfolio including Reflective Statement; and
- A score of at least 70% in the Role Simulation

To be awarded a 'Distinction', Apprentices must achieve the following:

- Competence in all Knowledge, Skills and Behaviours requirements of the Standard via their Portfolio including Reflective Statement; and
- A score of at least 90% in the Role Simulation

Confidentiality:

As Apprentices are likely to be involved in client work, it will be important that any potentially sensitive information (such as a client name) be removed from evidence submitted during both the on-programme and End-point Assessments.

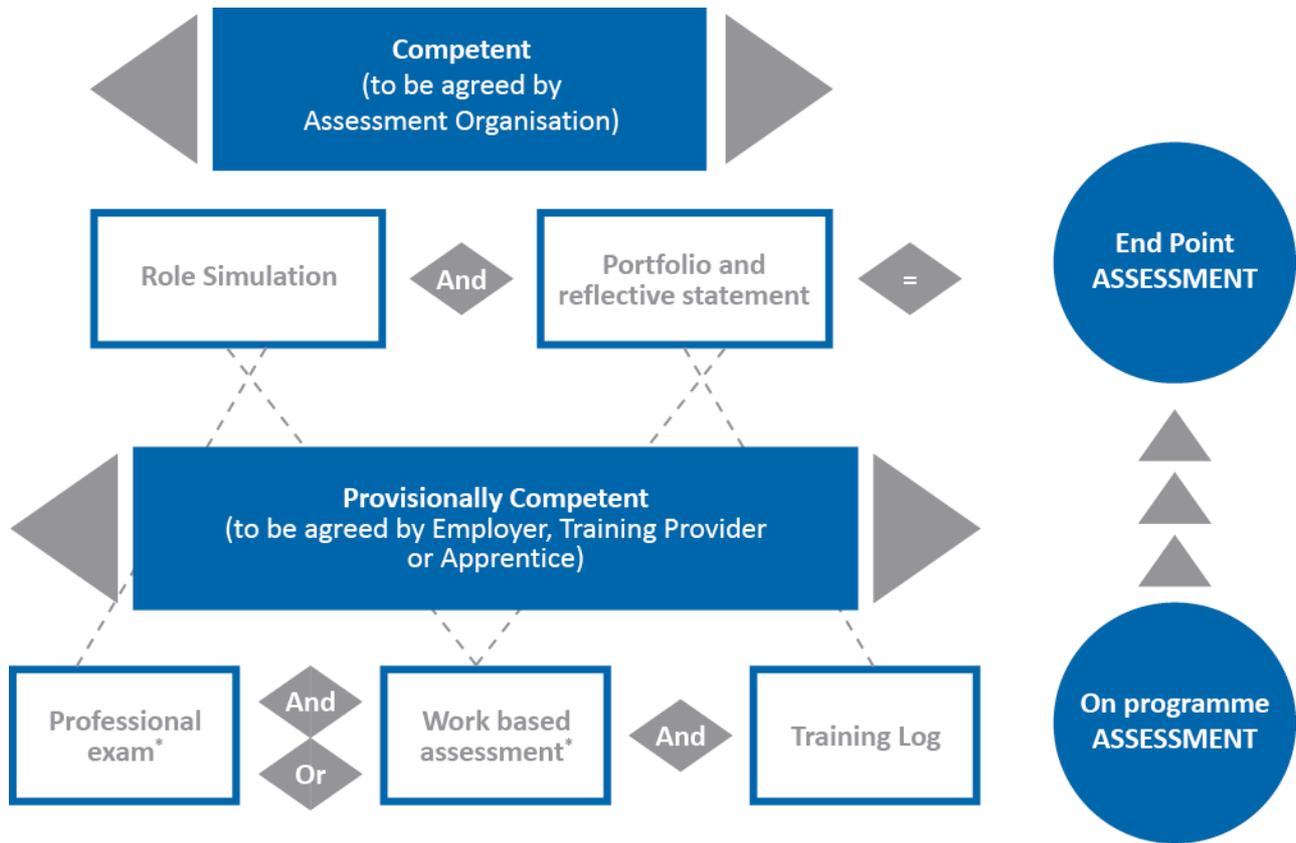
This should be a skill that Apprentices develop with guidance from Employers and Training Providers since it forms part of the "behavioural" aspects of the standard.

Data Protection in relation to the collation of evidence is key. This must be stored securely, whether this is an online portfolio, which requires logins to access or a locked filing cabinet if in paper form.

Product evidence must be signed off by someone more senior to you; they should confirm their full name, sign and date your evidence. By signing they are confirming that no confidential information has been left in your evidence. They also need to confirm their full name and contact details.

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The Learner Journey



*The weighting of Professional exams and Work Based assessment , towards determining provisional competency via On programme assessment, will vary between the Examination Route and the Work Experience Route.

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Below is an example of how a Professional Tax Technician Standard programme might look across its lifespan, with suggestions for the requirements of the different participants at various waypoints and suggestions for the documents that might evidence them. Again, this should be treated as advisory.

Month	Apprentice	Employer	Training Provider	Assessment Organisation
0	Understand role and Apprenticeship commitment	Deliver Induction training and understanding of the role and Apprenticeship Journey	Explains Apprenticeship, Roles, Timetable and commitments. Completes required enrolment paperwork	
0-1	Register as a student with ATT			Send confirmation of student status plus other information
1-12	Works to objectives, KPIs, Training Plan to develop Knowledge, Skills and Behaviours	Manages as with any other employee with monthly Reviews and Development Plans	Monitors progress, identifies gaps and recommends training needs. Provides feedback against learning outcomes. Carries out regular progress Reviews.	
6-18	Completes relevant Work Based Assessment and Professional Exams Continues building required Knowledge, Skills and Behaviours	Supports and coaches	Supports and trains	
18-19	Gateway to end point assessment. Employer and TP to review progress and agree Apprentice has reached required competency levels vs learning outcomes			
20-21	Apprentice, Employer and TP work together to agree the elements of end point assessment (Portfolio which includes a Reflective Statement and Role Simulation. TP to sign off against agreed requirements			
22-23	Completes Portfolio – submits for assessment. Plans Reflective Statement method	Reviews Portfolio and reflective Statement	Reviews Portfolio and reflective Statement	Assesses portfolio and sets up Reflective Statement
24	Participates in Reflective Statement (written statement, presentation or discussion)	Discusses grade for Apprentice if there is a disagreement. Informs Apprentice	Discusses grade for Apprentice if there is a disagreement. When a decision is made checks submission and administers as required	Reviews Reflective Statement and recommends final result. Chairs discussion to finalise grade for Apprentice if there is a disagreement

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Individual Learning Plan:

The Individual Learning Plan sets out the overarching structure for achieving the Standard, outlining:

- The components of the programme
- The learning required to enable the Apprentice to achieve
- The support required by the Apprentice to ensure effective learning and development
- The means by which each component will be assessed
- Proposed dates for achieving each component to ensure a timely completion of the overall programme

An Individual Learning Plan should always be considered a working document to be updated, adjusted and amended as the programme progresses.

(See example Individual Learning Plan – Appendix A)

Progress Review:

Progress Reviews provide an opportunity for regular oversight of progress against the plans agreed in the Individual Learning Plan. An effective Progress Review should take the form of a discussion between the Apprentice, their Employer and the Training Provider, and should encompass the following:

- Reflection on targets outlined for the review period, as defined by the Individual Learning Plan
- Consideration of any missed targets, reflection on the reasons why and arrangements for any additional support required
- Update to Individual Learning Plan of completed components and those requiring revised target dates
- Reflection on the value added to the Apprentice and the Employer within the review period by their learning, support and any assessment
- Setting of SMART targets for the next review period based on objectives set out in the Individual Learning Plan

Progress Reviews can also be used as an opportunity to ensure that the Apprentice's awareness of areas such as Health & Safety, Equality & Diversity and eSafety is promoted effectively.

Employers may also wish to consider incorporating the progress review into any internal review framework with the apprentice designed to monitor their progress as a trainee.

(See example Progress Review – Appendix B)

Training Log:

The Training Log is required to ensure that the Apprentice is developing the Knowledge, Skills and Behaviours required within the Professional Tax Technician Standard. The Log provides an opportunity for the Apprentice to identify and record examples within their work role where they have demonstrated the relevant Knowledge, Skills and Behaviours. These should then be agreed and approved by the Apprentice's workplace mentor and may also form part of the basis for Progress Review discussions.

The Apprentice should enter their examples as written statements into the Log against the relevant outcomes, and may choose to provide supporting evidence from the workplace. Ensuring a pro-active approach to completion of the Training Log will provide the Apprentice with an understanding of the likely requirements when building their Portfolio to be assessed.

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Building the Portfolio:

To build the final portfolio, the Apprentice must provide evidence that they have demonstrated the required Knowledge, Skills and Behaviours. Each Knowledge, Skill and Behaviour component is accompanied by a set of suggested learning outcomes, which provide an indication to the type of evidence that should be provided.

Every outcome is prefixed by the words

- Understand...

OR

- Be able to...

'Understand' learning outcomes require the Apprentice to provide evidence of their knowledge in their role. This can generally be effectively evidenced and assessed via;

- Written statements
- Question and answer
- Discussion

'Be able to' learning outcomes require the Apprentice to provide more practical evidence from their role. This can generally be effectively evidenced and assessed via;

- Evidence of the Apprentice's work activity
- Evidence development activity, meetings, performance review, appraisal
- Witness testimony from colleagues, managers and clients
- Personal statements by the Apprentice
- Observation in the workplace, where appropriate

In all instances, Apprentices and Assessors should be conscious of the following principles of assessment to ensure a portfolio that adequately demonstrates their Knowledge, Skills and Behaviours:

Valid

The evidence should be a valid means of demonstrating the Apprentice meeting the learning outcome. E.g. a witness testimony, copies of notes and slides, etc. would be appropriate evidence of an Apprentice delivering a presentation. A single photograph of them doing so would not.

Authentic

The evidence should be confirmed as the Apprentice's own work. Where the Apprentice provides personal statements as evidence of a situation, this should be agreed as authentic by a relevant person from the workplace. Where workplace evidence is provided for the portfolio, this should again be demonstrably the learner's own work; this may be evidenced by discussion with the apprentice, annotations on the documents or manager confirmation.

Current

The evidence should be recent enough to be considered a current indication of the Apprentice's Knowledge, Skills and Behaviours. As the Standard requires the Apprentice to demonstrate progression into their current role/placement, it is to be expected that any evidence provided will be drawn from this and therefore will be current. The typically accepted period deemed as 'current' is within the last two years, however evidence should always be as recent as possible in order to be a true reflection of Knowledge, Skills and Behaviours.

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Sufficient

The evidence should be deemed sufficient on which to make a safe assessment decision. Where knowledge is being evidenced and assessed, evidence should demonstrate sufficient breadth of understanding, underpinned by relevant policy, procedure, law, etc. and should have clear line of sight to the workplace.

Where evidence of practical skills and behaviours is required, the evidence should demonstrate sufficient depth for a Level 4 qualification. This can be defined as identifying, adapting and using skills to inform actions and address problems that are well-defined but are complex and may be non-routine. There may also be a requirement to reflect on the effectiveness and appropriateness of methods used, actions taken and results achieved.

Mapping and Marking Guidance

The following pages provide an overview of each Knowledge, Skills and Behaviours area, setting out:

- What the Apprentice is required to demonstrate
- The Learning Outcomes that will enable them to do so
- Suggested evidence methods
- Guidance for evidencing and marking each Skill and Behaviour

The Marking Guidance is directed toward the apprentice in its suggestions for providing evidence for each skill and behaviour. Independent assessors may also wish to use the guidance in supporting apprentices to build their portfolio of evidence.

A suggested mapping guide has also been provided, highlighting which Skill and Behaviour areas may produce evidence to support each of the Knowledge outcomes.

Please Note:

The marking guidance should be considered purely advisory; there are no mandatory requirements and Apprentices may identify examples of evidence more relevant to their own work context.

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Skills Required for the Professional Tax Technician Standard

Skill	What is Required	Learning Outcome	Types of Evidence	Marking Guidance
1. Analysis	Create and interpret information, and show how that information can be used most effectively to add value to the organisation	Understand how to organise and evaluate data that has been researched	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	You may consider: <ul style="list-style-type: none"> • The purpose and benefits of organising data so that it can be analysed • How to evaluate the relevance, validity and reliability of data • How to analyse and prepare researched data so results will be accurate and free from bias • The differences between primary and secondary research methods • The differences between quantitative and qualitative research methods
		Understand how to report data that has been researched	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	You may consider: <ul style="list-style-type: none"> • Ways of reporting data so that it meets agreed aims and objectives • Ways of reporting data so that it is accurate and free from bias
		Be able to analyse and evaluate data	<ul style="list-style-type: none"> • Workplace evidence to prove ability to analyse data • Training log • Observation report • Reflective statement authenticated by manager 	You might demonstrate how you: <ul style="list-style-type: none"> • Organise data to be analysed and reported • Select relevant, valid and reliable data • How you have applied analysis and evaluation techniques • How you have reviewed the data for accuracy and lack of bias in the results and conclusions • Obtaining feedback from the users of this data would be useful in determining if it was fit for purpose

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2. Communication	Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats	Understand how to plan business communication activities	<ul style="list-style-type: none"> • Discussion with mentor • Written statement • Discussion with line manager 	<p>You could consider:</p> <ul style="list-style-type: none"> • Different options (written and verbal) of business communications • Advantages / disadvantages of each in achieving desired outcome • How to determine which form of communication will be used based on who the audience is and desired outcome • How to ensure the most effective way to review the communications • Why it is important to review communications for errors and how this is achieved
		Be able to produce written business communications	Product evidence of a range of written communications	<p>You might demonstrate you can produce a range of evidence that covers different types of written communications. For example:</p> <ul style="list-style-type: none"> • a complex report • draft communications • amended documents • emails/memos/letters • minutes of meetings • presentations <p>These must be produced by you and authenticated as your own work.</p>
		Understand how to communicate verbally in a business environment	<ul style="list-style-type: none"> • Discussion with mentor • Written statement • Discussion with line manager 	<p>You could consider:</p> <ul style="list-style-type: none"> • Examples of how to use your own verbal communication in discussions, as appropriate to the audience and desired outcome • How body language, tone of voice can be used in different situations to influence verbal communication
		Be able to communicate information to the business environment	<ul style="list-style-type: none"> • Product evidence to prove able to communicate in business environment • Training log • Observation report 	<p>You could demonstrate that you are able to communicate and participate in activities such as</p> <ul style="list-style-type: none"> • team meetings • presentations • one to one discussions

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				<p>You could also demonstrate that you are able to actively listen to gain information and respond to questions appropriately. Supporting evidence for the above should be presented such minutes, presentation slides, discussion notes</p>
		<p>Be able to appreciate the point at which assistance is required</p>	<ul style="list-style-type: none"> • Training log • Witness testimony from manager • Product evidence showing when assistance has been requested 	<p>You should demonstrate that you are able to:</p> <ul style="list-style-type: none"> • Recognise when you require assistance • Seek assistance from the appropriate person. <p>Examples could include emails, meeting minutes and feedback.</p>

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3. Leadership	Proactively manage their own development and is committed to the job and their profession	Understand how to evaluate and improve own performance	<ul style="list-style-type: none"> • Discussion with mentor • Written statement • Discussion with line manager 	You could consider: <ul style="list-style-type: none"> • Why it is important to seek to continuously improve work • How to evaluate work that has been carried out for effectiveness • The benefits of encouraging and accepting feedback from others and how to do this • How learning and development can impact on improving performance
		Be able to evaluate and improve own performance using feedback from others	<ul style="list-style-type: none"> • Discussion with the assessor with confirmation by manager • Training log • Reflective statement 	You should demonstrate that they are able to: <ul style="list-style-type: none"> • Evaluate work completed over a period of time • Show how this has been used to drive any changes made • How you have used feedback from others in order to make these changes • How you have had a positive impact on improvements and your own effectiveness
		Be able to use evaluation and feedback to develop and use a learning plan	<ul style="list-style-type: none"> • Discussion with the assessor with confirmation by Manager • Training log • Appraisal documents • Reflective statement 	You could demonstrate: <ul style="list-style-type: none"> • How performance can be evaluated using feedback • Where further learning and development will improve your own performance • Developing and implementing a learning plan to support recommendations made

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4. Planning and Prioritisation	Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time and coordination the input of others in order to meet both deadline and changing priorities	Understand how to manage own time effectively to achieve objectives	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	You could consider: <ul style="list-style-type: none"> • How you prioritise tasks and objectives • How you monitor progress and what to do if targets are not being met • How to manage constraining factors that could hinder the achievement of an objective • What the implications of failing to meet objectives are
		Be able to prioritise and plan your work to meet objectives	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by Manager • Training log • Reflective statement 	You should demonstrate that you can: <ul style="list-style-type: none"> • Plan timescales • Review timescales and adjust where required • Evidence could include emails, calendar invitations, work plans. The evidence should show how tasks have been prioritised.
		Be able to manage conflicting pressures and making best use of time and resources	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by manager • Training log • Reflective statement - must be authenticated by manager 	You could demonstrate that you can: <ul style="list-style-type: none"> • Manage conflicting pressures such as urgent requests from different people • Reorganise tasks and priorities reset based on time and resources

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5. Produces Quality and Accurate Information	Apply tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion	Be able to accumulate data to help others make decisions	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by a manager • Training log • Reflective statement - must be authenticated by manager 	You should demonstrate that you are able to gather data relating to tax work that helps users to make decisions. Evidence could include accounts preparation, customer/supplier information, management accounts information, cash flow, tax returns, VAT work.
		Be able to demonstrate an understanding of the need for data backup and security	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by a manager • Training log • Reflective statement - must be authenticated by manager 	You should demonstrate that you are able to identify the need to backup data and security and provide examples of how this is achieved in the workplace. You should be able to describe and relate to your own workplace: <ul style="list-style-type: none"> • Different ways backups can be stored • Data file locations • Backup responsibilities • Location and retention requirements
		Be able to check that information you have provided is understood and sufficient	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by a manager • Training log • Reflective statement - must be authenticated by manager 	You could demonstrate that information produced has been understood through; <ul style="list-style-type: none"> • Feedback • Discussions • Seeking clarification

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6. Team Working and Collaboration	Work effectively in a team and with others, maintaining effective, professional working relationships both internally and externally across organisations	Understand the importance of teams to individual team members and to the team itself	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	<p>You could consider:</p> <ul style="list-style-type: none"> • The advantages and disadvantages of working in a team • How working in a team can contribute to a team's success and what is required in order for them to work • Roles within a team relating to theories and apply to own team • Personal skills and behaviours of individuals required for successful team working
		Understand leadership attributes and skills	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	<p>You could consider</p> <ul style="list-style-type: none"> • The difference between leadership and management. • Different leadership model and theories • The impact you have on performance of individuals and a team. • Skills and behaviour of team leaders required for successful leadership • Examples of emails and memos sent by managers to demonstrate different styles would illustrate the above well.
		Be able to contribute effectively to team work	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by a manager • Training log • Reflective statement - must be authenticated by manager 	<p>You should be able to demonstrate that you understand your own role within your team. It may be useful to provide a team structure chart.</p> <p>You should show that you have the appropriate skills for working as part of a team.</p> <p>You could assess your own contribution to achieving your own team's goals, providing examples based on interactions with and parts played by individual members.</p>
		Understand how to manage potential conflicts within a team	<ul style="list-style-type: none"> • Written statement • Discussion with mentor 	<p>You could consider:</p> <ul style="list-style-type: none"> • Role and personality conflict that can arise within a team • How to manage potential conflicts within a team • Examples of conflict within your team and how this was resolved • Examples of issues that you have been able to resolve themselves • Examples of when issues would have to (or have been) referred to senior management
		Be able to work with peers and assist	<ul style="list-style-type: none"> • Discussion with the mentor with 	<p>You should be able to demonstrate that you can create an environment for creative thinking with reference to relevant models.</p>

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		colleagues in creative thinking	confirmation by a manager <ul style="list-style-type: none">• Training log• Reflective statement - must be authenticated by manager	You could evaluate requirements for how those holding different roles will support creative thinking (e.g. directors, middle managers and lower level workers)
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7. Uses Systems and Processes	Understand the systems and processes of the organisation sufficiently, as applicable to the role. Proficient in the IT systems applicable to the role.	Understand own employer's approaches to and methodologies for tax work	<ul style="list-style-type: none"> • Discussion with mentor • Written statement • Discussion with line manager 	<p>You could consider:</p> <p>Your own employer's approaches to and methodologies for work</p> <p>The importance of consistency in approaches and methodologies when carrying out tax work</p> <p>Your own employer's risk management approaches</p> <p>The importance of risk management when carrying out tax work</p> <p>How tax work fits into a client's wider commercial position</p>
		Be able to improve effectiveness through the use of appropriate IT resources	<ul style="list-style-type: none"> • Discussion with the mentor with confirmation by a manager • Training log • Reflective statement - must be authenticated by manager 	<p>You could demonstrate that you are able to:</p> <p>Identify process inefficiencies</p> <p>Identify how identification and implementation of IT has/would have improved them</p> <p>Evaluate the effectiveness and further improvements that might be made</p>

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Behaviours Required By the Professional Accounting/Tax Technician Standard

Behaviour	What is Required	Learning Outcome	Types of Evidence	Marking Guidance
1. Adaptability	Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment.	Be able to show appreciation of both sides of an argument	<ul style="list-style-type: none"> • Reflective statement - must be authenticated by manager • Witness testimony • Observation record 	You should be able to demonstrate active listening skills to demonstrate an understanding and recognition of dual perspectives.
		Be able to actively develop your own skills and knowledge, acting on feedback where appropriate	<ul style="list-style-type: none"> • Formal feedback • Appraisal documents • Training logs 	<p>You should be able to demonstrate that you have changed or developed your approach or methodology on a task/s and that this has been effective and improved your performance.</p> <p>There should also be evidence that you recognise the importance of feedback, actively seek it and are receptive to its suggestions.</p>
		Be able to adapt to changing requirements while maintaining professional standards	<ul style="list-style-type: none"> • Witness testimonies • Reflective statement - must be authenticated by manager • Feedback forms • Appraisal feedback/ comments 	<p>You should show that you have recognised the need to change your approach or method where appropriate.</p> <p>You might consider what impact this had on professional standards, the changes that were made and how you maintained the expected level of professional service.</p>

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2. Adding Value	Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strive to improve own working processes and those of the organisation.	Be able to show commitment, independence and multitasking abilities	<ul style="list-style-type: none"> • Job review form • Formal feedback • Appraisal record • Witness testimony • Reflective statement - must be authenticated by manager 	<p>You should demonstrate that you have seen a task through its entirety.</p> <p>You should demonstrate using your own initiative throughout the task and being proactive in addressing any issues that could hinder the deadline, and advocating any other lines of services that could be offered where relevant.</p> <p>Evidence should demonstrate you being able to deliver consistent standards of work whilst engaging in multiple activities.</p>
		Be able to exceed the expectations of your employer/client	<ul style="list-style-type: none"> • Job review form • Formal feedback • Appraisal record • Witness testimony • Reflective statement - must be authenticated by manager 	You should provide examples of when you have gone above and beyond the requirements of allocated tasks, exceeding agreements or deadlines to providing an outstanding level of service to your client or employer.
		Be able to demonstrate your commitment to continuous learning	<ul style="list-style-type: none"> • Training record • Quarterly/Bi-annual objectives • Learning log • CPD records • Appraisal document 	<p>You should demonstrate that you have taken on-going responsibility for your own learning. This may comprise:</p> <ul style="list-style-type: none"> • Technical studies • Work role development • Policy & procedural requirements

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3. Ethics and Integrity	Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession.	Be able to keep abreast of professional developments	<ul style="list-style-type: none"> • CPD records • Training logs • Workplace evidence 	<p>You should demonstrate how you identify where professional developments will impact you (e.g. the Budget), and where relevant changes will impact clients.</p> <p>You should be able to identify where this information can be accessed and how to apply it.</p>
		Be able to demonstrate the ethical principle of confidentiality	<ul style="list-style-type: none"> • Reflective statement - must be authenticated by manager • Witness testimony • Workplace evidence 	You should provide workplace examples demonstrating your application of the principles of confidentiality; this application should extend to the evidence provided for the portfolio.
		Be able to demonstrate an awareness and understanding of social and environmental responsibility	<ul style="list-style-type: none"> • Reflective statement - must be authenticated by manager • Witness testimony • Workplace evidence 	You should demonstrate an awareness of aspects such as sustainability, green policies, fundraising with an indication of their application in their workplace.
		Be able to uphold professional values and standards	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Appraisal records • Witness testimonies • Reflective statement - must be authenticated by manager 	<p>You should demonstrate an understanding and application of the standards and values required by:</p> <ul style="list-style-type: none"> • Your employer • Any relevant professional body • Any third party (client, etc) <p>The evidence should demonstrate that are consistent in your application of values and standards.</p>

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4. Pro-activity	Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure.	Be able to work independently, completing tasks on time, coping with change and preparing fully	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Appraisal records • Witness testimonies • Reflective statement - must be authenticated by manager 	<p>You could demonstrate that you can:</p> <ul style="list-style-type: none"> • Plan and manage time • Record chargeable hours correctly • Meet deadlines whilst maintaining a consistently high quality of work • Independently implement changes in approach • Prioritise and reorganise tasks
		Be able to persevere in enquiry to ensure completeness, all within an ethical framework	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Appraisal record • Witness testimonies • Reflective statement - must be authenticated by manager 	<p>You could demonstrate that you ensure completeness through:</p> <ul style="list-style-type: none"> • Liaising with senior members of their team • Communicating with other lines of service • Liaising with the client where permitted <p>You should show that you have considered confidentiality, measured any potential threats to the ethical framework and where appropriate that you have applied relevant safeguards.</p>
		Be able to think and act ahead of anticipated events	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Appraisal records • Witness testimonies • Reflective statement - must be authenticated by Manager 	<p>You could demonstrate forward thinking through:</p> <ul style="list-style-type: none"> • Thorough planning and organisation prior to the job commencing • Checking to ensure all relevant information to complete the task is available • Identifying relevant actions where information and resources are not available

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5. Professional Scepticism	Demonstrates an attitude that includes a questioning mind, being alert to evidence that might suggest that tax return entries are not consistent with the underlying data.	Be able to demonstrate an awareness of regulatory requirements	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Witness testimonies • Reflective statement - must be authenticated by Manager 	You could demonstrate that you have attended and actively participated in any planning meetings prior to the job being undertaken, and that you understand what is key for this client and how this may be affected by regulations.
		Be able to question what you see and hear is reasonable or appropriate	<ul style="list-style-type: none"> • Job review forms • Feedback • Witness testimonies • Reflective statement - must be authenticated by Manager 	You should demonstrate that you have pursued further lines of enquiry to reach a satisfactory answer. You may also show that you have conducted further tests where appropriate. It may also be appropriate for you to demonstrate that you have sought second/third opinions from senior or more experienced members of the team.
		Be able to demonstrate an open mind to the possibility that something may be wrong or not as it seems	<ul style="list-style-type: none"> • Job review forms • Feedback reviews • Witness testimonies • Reflective statement - must be authenticated by manager 	You could provide evidence that you have raised a concern with colleagues/managers. You might demonstrate that you have investigated situations further and sought advice from more experienced members of the team.

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Knowledge Mapping

Below is a table outlining the Professional Tax Technician Knowledge requirements. These will be assessed by your Role Simulation, however you may also find that evidence presented for the Skills or Behaviours indicated by a tick provides evidence for the respective Knowledge area.

Knowledge	What is Required	Skills							Behaviours					
		1	2	3	4	5	6	7	1	2	3	4	5	
Business Awareness	Financial information is an outcome of an organisation's activities in the industries and environments in which it operates. In its simplest form, financial information reflects the transactions arising from the purchase and sale of products and services. A Professional Tax Technician will understand the industries and environments in which an organisation operates, including customer and supplier needs, in order to create and / or validate and / or report financial information.									√				
Ethical Standards	Ethics and integrity are fundamental to the role of all finance professionals as they often independently verify financial information that affects individuals and institutions that are separate from the management of an organisation. A Professional Tax Technician will understand and apply the relevant Ethical Standards to their own behaviour and appropriately challenge the actions of others where they do not meet these standards.											√	√	
Regulation & Compliance	Tax is governed by legislation. A Professional Tax Technician will be able to understand and apply professional and ethical standards and the law to an organisation's financial information, and to comply with the fundamental principles of integrity, objectivity, professional competence and due care and confidentiality					√			√	√	√	√		
Systems & Processes	Financial information is created, verified and reported via a combination of systems and processes, such as tax systems, internal control systems and IT systems. An understanding of these systems and processes is fundamental to a finance professional's ability to perform their role. A Professional Tax Technician will be able to understand and evaluate an organisation's systems and processes and make recommendations for improvement, as appropriate. Depending on their role they may also have a basic understanding of external and internal audit's function in giving assurance over these systems and processes.	√				√								

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Reflective Statement:

The Reflective Statement should draw together the lines of the Knowledge, Skills and Behaviours and provide the Apprentice with an opportunity to consider their development into the role via the programme.

An effective structure for a reflective statement would be as follows:

- What was your starting point?
 - The Apprentice should consider the knowledge, skills, behaviours and attitudes they came to the training programme with.
- What learning took place in the workplace to develop the required knowledge, skills and behaviours?
 - The Apprentice should consider formal mentoring and support, colleague influence, exposure to other work areas, etc.
- 3-6 examples of situations from their portfolio setting out:
- What the specifics of the situation were
 - How relevant knowledge, skills and behaviour were applied
 - What went well for the Apprentice in the situation
 - What they might do differently next time
- An overall consideration of the value added to the Apprentice by the programme from their perspective

The Apprentice may consider a number of ways of presenting their reflection:

- Written statement
- Recorded discussion
- Presentation

In all instances, they should be mindful of the need for confidentiality of information, data and clients within their workplace and ensure that their evidence respects this.

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Appendix A: Example Individual Learning Plan

APPRENTICE NAME	
SHORT TERM GOAL(S) (during programme)	
LONG TERM GOAL (S) (after programme / including qualifications)	
WHY IS THIS APPRENTICESHIP RELEVANT TO JOB ROLE?	
WHAT ADDITIONAL SUPPORT IS REQUIRED?	
DIAGNOSTICS CARRIED OUT?	
Diagnostic Results	

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Knowledge	What is Required	Learning Required	Suggested Evidence / How it will be gathered	Start Date	Target Date
Business Awareness	Financial information is an outcome of an organisation's activities in the industries and environments in which it operates. In its simplest form, financial information reflects the transactions arising from the purchase and sale of products and services. A Professional Tax Technician will understand the industries and environments in which an organisation operates, including customer and supplier needs, in order to create and / or validate and / or report financial information.		Role simulation		
Ethical Standards	Ethics and integrity are fundamental to the role of all finance professionals as they often independently verify financial information that affects individuals and institutions that are separate from the management of an organisation. A Professional Tax Technician will understand and apply the relevant Ethical Standards to their own behaviour and appropriately challenge the actions of others where they do not meet these standards.		Role simulation		
Regulation and Compliance	Tax is governed by legislation. A Professional Tax Technician will be able to understand and apply professional standards and legal regulations to an organisation's financial information, and to comply with the fundamental principles of integrity, objectivity, professional competence and due care and confidentiality		Role simulation		

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Systems and Processes	Financial information is created, verified and reported via a combination of systems and processes, such as tax software internal control systems and IT systems. An understanding of these systems and processes is fundamental to a tax technician's ability to perform their role. A Professional Tax Technician will be able to understand and evaluate an organisation's systems and processes and make recommendations for improvement, as appropriate. Depending on their role they may also have a basic understanding of external and internal audit's function in giving assurance over these systems and processes.		Role simulation		
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Skills	What is Required		Suggested Evidence / How it will be gathered	Start Date	Target Date
Analysis	Create and interpret information, and show how that information can be used most effectively to add value to the organisation				
Communication	Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats				
Leadership	Proactively manage their own development and is committed to the job and their profession				
Planning and Prioritisation	Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time and coordination the input of others in order to meet both deadline and changing priorities				
Produces Quality and Accurate Information	Apply tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion				
Team Working and Collaboration	Work effectively in a team and with others, maintaining effective, professional working relationships both internally and externally across organisations				
Uses Systems and Processes	Understand the systems and processes of the organisation sufficiently, as applicable to the role. Proficient in the IT systems applicable to the role.				

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Behaviours	What is Required		Suggested Evidence / How it will be gathered	Start Date	Target Date
Adaptability	Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment.				
Adding Value	Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strive to improve own working processes and those of the organisation.				
Ethics and Integrity	Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession.				
Proactivity	Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure.				
Professional Scepticism	Demonstrates an attitude that includes a questioning mind, being alert to conditions that might suggest that tax return entries are not consistent with the underlying data.				

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DECLARATION

This is to certify that this programme of learning has been discussed and agreed between the parties responsible for the management and achievement of the Individual Learning Plan.

Apprentice
Signature

Print

Date

Employer
Signature

Print

Date

Assessor
Signature

Print

Date

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Appendix B – Progress Plan Review Template

Learner name		Employer/Manager	
Assessor		Date completed	
Qualification		Planned next review	
Start date		Planned End Date	

Goals from last review			
Were the goals from the last review met?	Yes	No	Partially
If No or Partially explain why goals were not achieved			

Skills, Behaviours and Knowledge		
Competency Framework updated	Yes	No
List Skills, Behaviours and Knowledge where competent examples achieved since last review		
Development areas added to PDP	Yes	No
Summarise Skills, Behaviours and Knowledge that require development and brief action plan		

Summary of actions
Current Focus List Skills, Behaviours and Knowledge where further evidence of competency is required
Line Manager Planning Summarise the opportunities for development and evidence from planned tasks or projects

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Goal	Activity	Who involved	Review date

Assessor Comments			
Assessor Signature:		Date:	
PROGRESS AND TRAINING AT WORK (Any additional H&S or welfare training you have received)	ADDITIONAL SUPPORT REQUIRED OR PROVIDED		
DISCUSSION ON Equality, Diversity, Inclusion/e-Safety/Health and Safety/Safeguarding			
Area discussed today (please circle): Equality and diversity E-Safety Health and Safety Safeguarding			

Learner Comments			
Are you aware of the Appeals Process?	Yes	No	Re-issued
I can confirm that I have been in continuous training since my start date / last review and that I am still in training today			

Learner Signature:		Date:	
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Employer Comments			
I, the Employer / Supervisor of the learner, can confirm that I am actively involved in the review process			
Employer Signature:		Date:	

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Appendix C – Example Training Log

Apprentice Name		Manager Name		Training Mentor	
Job Title		Summary of Role			
Employer Name & Address				Start Date	
Knowledge Outcomes					
Outcome	Evidence	Date Achieved	Feedback	Apprentice Signature	Employer Signature
Business Awareness					
Ethical Standards					
Regulation & Compliance					
Systems & Processes					

Skill	What is Required	Learning Outcome	Specific Example	Date Achieved	Feedback	Apprentice Signature	Employer Signature
1. Analysis	Create and interpret information, and show how that information can be used most effectively to add value to the organisation	Understand how to organise and evaluate data that has been researched					
		Understand how to report data that has been researched					
		Be able to analyse and evaluate data					

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2. Communication	Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats	Understand how to plan business communication activities					
		Be able to produce written business communications					
		Understand how to communicate verbally in a business environment					
		Be able to communicate information to the business environment					
		Be able to appreciate the point at which assistance is required					
3. Leadership	Proactively manage their own development and is committed to the job and their profession	Understand how to evaluate and improve own performance					
		Be able to evaluate and improve own performance using feedback from others					
		Be able to use evaluation and feedback to develop and use a learning plan					

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4. Planning and Prioritisation	Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time and coordination the input of others in order to meet both deadline and changing priorities	Understand how to manage own time effectively to achieve objectives					
		Be able to prioritise and plan your work to meet objectives					
		Be able to manage conflicting pressures and making best use of time and resources					
5. Produces Quality and Accurate Information	Apply tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion	Be able to accumulate data to help others make decisions					
		Be able to demonstrate an understanding of the need for data backup and security					
		Be able to check that information you have provided is understood and sufficient					

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6. Team Working and Collaboration	Work effectively in a team and with others, maintaining effective, professional working relationships both internally and externally across organisations	Understand the importance of teams to individual team members and to the team itself					
		Understand leadership attributes and skills					
		Be able to contribute effectively to team work					
		Understand how to manage potential conflicts within a team					
		Be able to work with peers and assist colleagues in creative thinking					
7. Uses Systems and Processes	Understand the systems and processes of the organisation sufficiently, as applicable to the role. Proficient in the IT systems applicable to the role.	Understand own employer's approaches to and methodologies for tax work					
		Be able to improve effectiveness through the use of appropriate IT resources					

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Behaviour	What is Required	Learning Outcome	Specific Example	Date Achieved	Feedback	Apprentice Signature	Employer Signature
1. Adaptability	Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment.	Be able to show appreciation of both sides of an argument					
		Be able to actively develop your own skills and knowledge, acting on feedback where appropriate					
		Be able to adapt to changing requirements while maintaining professional standards					
2. Adding Value	Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strive to improve own working processes and those of the organisation.	Be able to show commitment, independence and multitasking abilities					
		Be able to exceed the expectations of your employer/client					
		Be able to demonstrate your commitment to continuous learning					

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3. Ethics and Integrity	Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession.	Be able to keep abreast of professional developments					
		Be able to demonstrate the ethical principle of confidentiality					
		Be able to demonstrate an awareness and understanding of social and environmental responsibility					
		Be able to uphold professional values and standards					
4. Pro-activity	Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure.	Be able to work independently, completing tasks on time, coping with change and preparing fully					
		Be able to persevere in enquiry to ensure completeness, all within an ethical framework					
		Be able to think and act ahead of anticipated events					

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5. Professional Scepticism	Demonstrates an attitude that includes a questioning mind, being alert to evidence that might suggest that tax return entries are not consistent with the underlying data.	Be able to demonstrate an awareness of regulatory requirements					
		Be able to question what you see and hear is reasonable or appropriate					
		Be able to demonstrate an open mind to the possibility that something may be wrong or not as it seems					

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Appendix D: Example Electronic Portfolio Structure

The structure, navigation and functionality of ePortfolios will vary according to the different brand and platform. However, in order to build an effective portfolio for the Professional Tax Technician programme, the following would be advised as a general guide.

Long Term Planning:

- *Option 1* – Built-in objective setting function, e.g. online form
- *Option 2* – Repository space for upload of electronic Individual Learning Plan (*e.g. Appendix A*) or scanned paper version

Mid Term Planning & Review

- *Option 1* – Built in progress review function, e.g. online form
- *Option 2* – Repository space for upload of electronic forms or scanned documents, e.g. progress reviews (*e.g. Appendix B*), specific workplace review documentation and other support records

On-going Training Log

- *Option 1* – Built in training log platform
- *Option 2* - Repository space for upload of electronic training log (*e.g. Appendix C*) or scanned document

Upload of Portfolio Evidence

The online platform should allow for:

- The programme to be divided into relevant components (e.g. Skills > Requirements > Learning Outcome)
- Suitable evidence to be uploaded by the apprentice with support from their training mentor
- Suitable evidence to be mapped to the relevant programme components by the apprentice with support from their training mentor

Assessment of Portfolio Evidence

The online platform should enable the independent assessor to:

- Access the evidence uploaded and clearly view which components it has been mapped against
- Provide feedback to the apprentice on the assessment of their evidence
- Provide actions to the apprentice where evidence is deemed to be insufficient to meet the requirements

Miscellaneous

It may also be useful to provide repository space for the apprentice to store ancillary documents relating to their programme – e.g. CV, job description, initial assessment documents.

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Appendix E: Example Paper Portfolio Template

Front sheet

- Apprentice Name
- Employer
- Workplace Mentor
- Training Provider Mentor
- Start Date

Section 1

- CV/Personal Profile
- Initial Assessment Documents

Section 2

- Individual Learning Plan
- Progress Reviews
- Other support records

Section 3

- Training Log
- Supporting Evidence for Training Log

Section 4

- PATT Standard
- Assessment Record

Section 5

- End point assessment evidence

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Appendix F: Sample Assessment Record

Skill	What is Required	Learning Outcome	Evidence Location				
Analysis	Create and interpret information, and show how that information can be used most effectively to add value to the organisation	Understand how to organise and evaluate data that has been researched					
		Understand how to report data that has been researched					
		Be able to analyse and evaluate data					
Communication	Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats	Understand how to plan business communication activities					
		Be able to produce written business communications					
		Understand how to communicate verbally in a business environment					
		Be able to communicate information to the business environment					
		Be able to appreciate the point at which assistance is required					
Leadership	Proactively manage their own development and is committed to the job and their profession	Understand how to evaluate and improve own performance					
		Be able to evaluate and improve own performance using feedback from others					
		Be able to use evaluation and feedback to develop and use a learning plan					
Planning and Prioritisation	Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time and coordination the input of others in order to meet both deadline and changing priorities	Understand how to manage own time effectively to achieve objectives					
		Be able to prioritise and plan your work to meet objectives					
		Be able to manage conflicting pressures and making best use of time and resources					
Produces Quality and Accurate Information	Apply tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion	Be able to accumulate data to help others make decisions					
		Be able to demonstrate an understanding of the need for data backup and security					
		Be able to check that information you have provided is understood and sufficient					

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Behaviour	What is Required	Learning Outcome	Evidence Location				
Adaptability	Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment.	Be able to show appreciation of both sides of an argument					
		Be able to actively develop your own skills and knowledge, acting on feedback where appropriate					
		Be able to adapt to changing requirements while maintaining professional standards					
Adding Value	Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strive to improve own working processes and those of the organisation.	Be able to show commitment, independence and multitasking abilities					
		Be able to exceed the expectations of your employer/client					
		Be able to demonstrate commitment to continuous learning					
Ethics and Integrity	Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession.	Be able to keep abreast of professional developments					
		Be able to demonstrate the ethical principle of confidentiality					
		Be able to demonstrate an awareness and understanding of social and environmental responsibility					
		Be able to uphold professional values and standards					
Proactivity	Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure.	Be able to work independently, completing tasks on time, coping with change and preparing fully					
		Be able to persevere in enquiry to ensure completeness, all within an ethical framework					
		Be able to think and act ahead of anticipated events					
Professional Scepticism	Demonstrates an attitude that includes a questioning mind, being alert to conditions that may indicate possible misstatement of financial information due to error or fraud.	Be able to demonstrate awareness of regulatory requirements					
		Be able to question what you see and hear is reasonable or appropriate					
		Be able to demonstrate an open mind to the possibility that something may be wrong or not as it seems					

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Feedback

Assessor Name:

Assessor Signature:

Date of Assessment:

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Glossary of Key Terms

Apprentice	The individual undertaking the Apprenticeship programme.
Assessment Organisation	The independent organisation taking responsibility for setting out the requirements for assessment of the programme.
ATT	The Association of Tax Technicians – the professional body for taxation technicians in the United Kingdom.
Behaviours	A set of statements defining the professional behaviours the apprentice is required to demonstrate in order to achieve the qualification.
Employer	The organisation at which the apprentice is employed for the duration of their programme.
End Point Assessment	Final formal assessment of the Standard via Role Simulation, Portfolio and Reflective Statement.
Independent Assessor	Individual employed by the Training Provider to support and mentor the apprentice to the End Point assessment stage.
Knowledge	A set of statements defining the professional knowledge the apprentice is required to demonstrate in order to achieve the qualification.
Learner Journey	Process of progression from enrolment and induction, through the On Programme Assessment phase culminating in End Point Assessment.
On Programme Assessment	Minimum 12 month programme of development of knowledge, skills and behaviours, and collation of related portfolio of evidence.
Portfolio	A collection of evidence to demonstrate how the apprentice has demonstrated the required knowledge, skills and behaviours.
Professional Examination	On Programme Assessment option enabling the apprentice to demonstrate knowledge via formal examination.
Reflective Statement	End Point Assessment stage requiring the apprentice to review their knowledge, skills and behaviours development, to reflect on the process and consider future implications.
Role Simulation	End Point Assessment stage requiring the apprentice to demonstrate competence in the required range of knowledge, skills and behaviours across one single assessment.

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Skills	A set of statements defining the professional skills the apprentice is required to demonstrate in order to achieve the qualification.
Standard	The outline of knowledge, skills and behaviour and related assessment requirements for the apprenticeship.
Training Log	Document detailing the apprentice's plans for developing the required knowledge, skills and behaviour and recording progress against plans.
Training Provider	The organisation providing the On Programme Assessment support to the apprentice and their employer.
Work Based Assessment	On Programme Assessment option enabling apprentice to demonstrate competence portfolio of work activity evidence.