

## 1.0 Policy

To meet its strategic objectives and ensure clarity for customers of its services, Advance Assessments' has a policy of publishing and adhering to a fees and invoicing procedure. This policy and procedure also ensures compliance with the Ofqual General Conditions of Recognition, particularly conditions:

- F1: Making fee information available,
- F2: Packaging qualifications with other products and services, and
- F3: Invoicing purchasers

## 2.0 Procedure

2.1 The Assessment Manager of Advance Assessments is responsible for implementation of this procedure.

2.2 **Fee information.** All fees for Advance Assessments' services will be displayed openly on the Advance Assessments' website at the area titled '**Fee Information – full breakdown of fees**' link:

<https://www.advanceassessments.co.uk/mod/page/view.php?id=38> This link is freely accessible to all visitors to the site.

2.3 From time-to-time it may be necessary to update fees. Prior to editing the fee information displayed, the editor will copy the current fee information page and save it as a pdf file, titled in the format 'Fee Information\_ mm/dd/yyyy'. The pdf file of previous published fees will be stored in the Advance Assessments area '**Fee information archive**', link: <https://www.advanceassessments.co.uk/mod/folder/view.php?id=337> This link is freely accessible to all visitors to the site.

2.4 **End Point Assessment fees.** The fees applicable to any apprentice End Point Assessment (EPA) will be those current at the time of enrolment of the apprentice into an assessment area on the Advance Assessments system, as shown on the apprentice's user profile. Applicable fees may be found in the link for current fees (item 2.2) or in the fee archive (item 2.3).

2.5 **Qualification fees.** The fees applicable to any qualification will be those current at the time of enrolment of the learner into a qualification area on the Advance Assessments system, as shown on the learner's user profile. Applicable fees may be found in the link for current fees (item 2.2) or in the fee archive (item 2.3).

2.6 **Packaging qualifications with other products and services.** The packaging of qualifications with other products or services must be approved within a General Practice Review Meeting. In all cases any qualification offered in a package must be available for purchase separately from the package and the information provided in the website's Fee Information section must clearly inform potential purchasers of this.

2.7 **Invoicing purchasers.** Purchasers of qualifications and assessments must be issued in a timely manner and in accordance with the procedure detailed in items 2.7.1 to 2.7.5 (inclusive) and item 2.7 below:

- 2.7.1 Advance Assessments (AA) will issue invoices on a regular basis, normally weekly.
- 2.7.2 Invoices are always issued for the full fee amount, as shown on the AA online assessment system, except where there is a written agreement with the purchaser to vary the amounts

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- 2.7.3 Invoices are sent as pdf attachments to emails addressed to the finance contact for the purchasing organisation
- 2.7.4 Invoices will be retained in secure 'cloud' storage for a minimum of six years following the end of the AA financial year in which they were raised
- 2.7.5 Monthly checks on business activity and invoices raised will be conducted in order to ensure that no chargeable actions have taken place for which no invoice has been raised.

**2.8 Invoice content.** Each invoice will be raised using the standard AA template that includes the following information:

- 2.8.1 A unique invoice number
- 2.8.2 Invoice date
- 2.8.3 Advance Assessments' name, postal address, email address, bank account details, breakdown of charges and invoice total value
- 2.8.4 Payment terms
- 2.8.5 Customer purchase order or reference
- 2.8.6 Customer accounts department email contact details.

**3.0 Documents associated with this procedure**

3.1 AA\_OP\_20 General Practice Review Meetings Policy and Procedure

#### 4.0 Document Revision History

4.1 Following improvement identifications and review with colleagues, the Assessment Manager is responsible for revisions of this policy/procedure and completion of the table below, before issue of the amended policy/procedure.

Date (most recent first)	Revision(s)	Reason for revision(s)	New Version Number	Approved by (Initial)
29/12/2022	Item 2.4 has term 'End Point Assessment (EPA)' added  Item 2.5 added and subsequent items re-numbered	Clarity  To allow for the award of qualifications other than apprenticeship EPAs	2022/01	GM