



marshall
assessment

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Invoicing & Payment Policy

Version:	Version 1.3
Policy Owner:	Simon Jukes
Associated documents:	Appeals policy
Ofqual General Conditions:	F3.2 An awarding organisation must establish, maintain, publish and comply with a written policy on invoicing. F3.3 The policy must specify the processes to be followed by the awarding organisation in relation to the issue, payment and retention of invoices and the content of invoices.
Review date:	Dec 2024
Reviewed by:	S. Jones
Agreed by:	Senior Leadership Team
Next review date:	Dec 2025
Summary of changes: Addition of contents page and related Ofqual conditions. 90 days before sanction to put provider on Stop (previously 60 days).	

Contents

1. Purpose	2
2. Scope	2
3. Invoicing Procedures	2
4. Payment Terms	3
5. Cancellation and Refunds	3
6. Queries, Disputes & Appeals	3
7. Confidentiality	4
8. Amendments	4
9. Contact Information	4

1. Purpose

This policy outlines the terms and procedures related to invoicing and payments for services provided by Marshall Assessment Ltd (MA), an End-Point Assessment Organisation on the apprenticeship provider and assessment register (APAR) based in England. This ensures clarity, fairness and timely payments for all stakeholders.

2. Scope

This policy applies to all customers, including educational institutions, employers and any other entity seeking the services of MA.

3. Invoicing Procedures

3.1 Issuance: Invoices will be issued upon completion of the first part of the End-Point Assessment, issued electronically via email to the customer's preferred contact email address usually in finance.

3.2 Details: Each invoice will clearly outline the specific end-point assessment service provided, the associated costs, the total amount due, payment due date and the Standard and apprentice this relates to.

3.3 Custom Charges: Any additional services or custom requirements will be invoiced separately, unless otherwise agreed in writing.

4. Payment Terms

4.1 Standard Payment Term: Payment is due within 30 days of the invoice date unless otherwise agreed upon in writing.

4.2 Late Payments: Any invoice not paid by the due date may be subject to a late fee of 2% of the total unpaid amount, compounded monthly. If fees are outstanding for more than 90 days MA will discuss with the employer and put a stop on the training provider until payments have been made. If this persists beyond these measures we reserve the right to contact the ESFA/DfE regarding withholding payments by the training provider to the EPAO.

4.3 Methods of Payment: Payments can be made via bank transfer only. Details for payment methods will be provided on the invoice.

5. Cancellation and Refunds

5.1 Cancellation by Provider / Apprentice/ Employer: Cancellations made by the Training Provider / Apprentice/ Employer less than 14 days before the scheduled assessment date may be subject to a cancellation fee as specified in the terms and conditions and Marshall Assessment's Cancellation – resit - retake policy.

5.2 Cancellation by MA: If MA need to cancel a scheduled assessment for any unforeseen reason, customers will be given the option to reschedule at the earliest opportunity for both parties in order to ensure the apprentice is not adversely affected.

6. Queries, Disputes & Appeals

6.1 Invoice Queries: Any queries related to an invoice must be raised within 10 days of the invoice date. After this period, the invoice will be deemed accurate and acceptable by the customer.

6.2 Disputes: In the event of a dispute, customers are requested to notify MA in writing. Both parties will aim to resolve the issue amicably within 30 days. If a resolution cannot be achieved, the matter may be escalated as per the terms in the contract. Please see Marshall Assessment Appeals Policy for details on appealing a decision regarding a late payment sanction.

7. Confidentiality

All financial transactions and associated details will be treated as confidential and will not be disclosed to third parties unless required by law.

8. Amendments

This policy may be updated periodically to reflect changes in regulatory requirements, industry practices, or the services offered by MA. Training Providers (Customers) will be notified of significant changes.

9. Contact Information

For any queries, disputes, or clarifications related to this policy, please contact:

helpdesk@marshall-assessment.com