Initial assessment record template

Learner and programme

Field	Details
Learner	
Programme, level and duration	
Date of initial assessment	
Carried out by	

The four areas

Area	What to record	Details
Learner eligibility	The check, and its outcome.	
Recognition of prior learning	What the learner has already learned that is relevant to the programme.	
English and maths	Assessed, or not required and why. Aged 16 to 18 without an equivalent qualification: mandatory (para 47.1). Aged 19 and over: only if the employer agrees (para 47.2).	
Learning support: the screening exercise	How it was run, and the outcome (para 43).	
Learning support: what the learner told you	Anything the learner declared about their learning.	
Learning support: any other assessment at enrolment (optional, no rule asks for one)	What was used, and what it flagged.	

Area	What to record	Details
Learning support: further, evidence-based assessment	Needed or not; carried out by whom; the date of the evidence.	

Outcome

Field	Details
Support plan needed	
Agreed with the learner in writing (date)	
First review date	
The learner's agreement (signature and date)	