ENERGY & ENVIRONMENT AWARDS

Skills for a greener world

EEA Level 2 End-point Assessment for Dual Fuel Smart Meter Installer

Supporting Documents

QAN: 610/6014/8
ST0158 V1.1

Internal

Supporting Documents for

EEA Level 2 End-point Assessment for Dual Fuel Smart Meter Installer

QAN 610/6014/8

Updates to the supporting documents 3

Appendix A: Glossary 4

Appendix B: Gateway Eligibility Form 5

Appendix C - Level 2 Dual Fuel Smart Meter Installer Work Observation and Planning Form 9

Appendix D: Practice Workplace Observation Template 20

Appendix E: Practice End-point Interview Template 37

Appendix F: Portfolio Mapping Document 66

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Updates to the supporting documents

Since the first publication of Energy & Environment Awards Supporting Documents, the following updates have been made.

Version	Date first published	Section updated	Page(s)
v3.0	August 2025	Rebranded	All
v2.0	September 2023	New template and criteria IDs	All
v1.0	2022	First published	All

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Appendix A: Glossary

Amplification – provides more detail on how individual knowledge, skills or behaviours statements should be interpreted. Where the KSB statements, themselves are deemed self-explanatory, no amplification is provided. Assessment may include questions on anything identified in the amplification

Behaviours (as part of KSBs) – specific mindsets, attitudes or approaches identified as part of the apprenticeship standard that must be evidenced during end-point assessment

Elements – are the knowledge, skills and behaviours and what is needed to competently undertake the duties required for an occupational standard

Gateway - the stage of the apprenticeship where the apprentice, employer and training provider determine whether the apprentice is ready to undertake end-point assessment

Guidance – is only provided where it is required to support interpretation of the KSB statements

Knowledge (as part of KSBs) – specific information, technical detail, and 'know-how' identified as part of the apprenticeship standard that must be evidenced during end-point assessment

Skills (as part of KSBs) – the practical application of knowledge identified as part of the apprenticeship standard that must be evidenced during end-point assessment

Standard – An occupational standard is a description of an occupation. It contains occupational profile, and describes KSBs needed for someone to be competent in the occupation's duties. Occupational standards are developed by employers for occupations that meet the Institute for Apprenticeships and Technical Education current occupation criteria

Topic - is a collection of elements grouped into a theme e.g. Health and Safety

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Appendix B: Gateway Eligibility Form

(Standard Version: ST0158 version 1.1; Assessment Plan Version: ST0158/AP02)

Apprentice's name:	Apprentice's job title:
Name of Employer:	Name of Training provider:
Employer representatives present:	Training provider representatives present:
Apprenticeship start date:	Apprenticeship on-programme end date:
Gateway meeting date:	
Has the apprentice taken any part of the end-point assessment for this apprenticeship standard with any other End-point Assessment Organisation?	Y / N
If "Yes" please give details:	

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Apprentice's details

Eligibility requirements:

The apprentice must confirm their achievement of the following:
Note: For apprentices aged 19+, if maths and/or English have been attempted but not achieved evidence of the attempt should be submitted.

Eligibility requirement	Achieved by the apprentice? Y/N	Evidence (Scans of certificates MUST be included)
Achieved Level 1 English (in line with the apprenticeship funding rules)		
Achieved Level 1 Maths (in line with the apprenticeship funding rules)		
Proof of registration on the Gas Safe® Register		
Proof of registration on the Meters Operators Code of Practice Agreement (MOCoPA)		
Compiled and submitted a competent portfolio of evidence that meets the specification requirements, on which the end-point interview will be based		

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Gateway Eligibility Declaration

1. The apprentice, the employer and the training provider must sign this form to confirm that they understand and agree to the following:
2. The apprentice has completed the required on-programme elements of the apprenticeship and is ready for end-point assessment with Energy & Environment Awards.
3. Energy & Environment Awards has been informed about any reasonable adjustment and/or special considerations requests.
4. The apprentice will only submit their own work as part of end-point assessment.
5. All parties agree that end-point assessment evidence may be recorded and stored by Energy & Environment Awards for quality assurance purposes.
6. The apprentice has been on-programme for a minimum duration of 365 days.
7. The apprentice has achieved English and maths Level 1 or higher as detailed in this document in line with the apprenticeship funding rules.
8. The apprentice has proof of registration on the Gas Safe® Register.
9. The apprentice has proof of registration on the Meters Operators Code of Practice Agreement (MOCoPA)
10. The apprentice satisfactorily completed a formal training plan agreed by the employer.
11. The apprentice has compiled and submitted a competent portfolio of evidence, on which the end-point interview will be based.
12. The apprentice, if successful, gives permission for Energy & Environment Awards to request the apprenticeship. certificate from the ESFA who issue the certificate on behalf of the Secretary of State.
13. The apprentice has been directed to Energy & Environment Awards Appeals Policy and Complaints Policy.
14. The employer/training provider has given Energy & Environment Awards at least three months' notice of requesting this EPA for this apprentice.
15. If the Gateway Eligibility Report is not completed in full, meeting all requirements, and submitted to Energy & Environment Awards, the end-point assessment cannot take place.

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Signed on behalf of the employer (print name):	Signature:	Date:
Signed on behalf of the training provider (print name):	Signature:	Date:
Apprentice's name (print):	Signature:	Date:
Energy & Environment Awards use only:		
Energy & Environment Awards Sign off:		
Comments/actions:		

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Appendix C - Level 2 Dual Fuel Smart Meter Installer Work Observation and Planning Form

Instructions

This form has two purposes:

1. To help you plan a practice Work Observation for your apprentices
2. To inform Energy & Environment Awards of the proposed task(s) for the live assessment

The apprentice is assessed in a real working environment. The workplace observation must take place on a live job within a customer's premises.

The time allowed for the workplace observation is 3 hours. This is based on the comparable time that an industry competent worker would take to achieve successful task(s) completion

Equipment and resources needed for the assessment must be in good and safe working condition.

The activities should be designed to assess the knowledge, skills and behaviours developed over the period of the apprenticeship. However, as a minimum the work observation must cover the activities and KSBs listed in the Planning Form below.

Energy & Environment Awards must review the employer/training provider's Work Observation task brief.

Task variations: If you have more than one apprentice being assessed, use the "Work Task variations" section of the form to indicate what the task variations that will be put in place so that apprentices are not asked to complete identical tasks.

Complete the 'Level 2 Dual Fuel Smart Meter Installer Work Observation Planning Form' and submit it to the Service Delivery team via enquiries@energyenvironmentawards.co.uk, for **review 1 month before the start** of the end-point assessment.

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Level 2 Dual Fuel Smart Meter Installer Work Observation Planning Form

Employer name and site address:	
Training provider (if applicable)	
Standard:	**Dual Fuel Smart Meter Installer**
Level	**2**
Location of practical	
Summary of activity: Please provide a brief summary of the overall task/s to be completed during the assessment period	
Contact Details: Employer/training provider representative, email address and contact number overseeing the setup of the competency test (documents and site).	
Date submitted to Energy & Environment Awards	

Estimated total duration of practical task(s) to be completed on a live job within a customer's premises will be 3 hours.

Please state time for the practical task(s):

_____

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Work Observation Checklist

This checklist will assist the employer and/or training provider with planning the activity.

Apprentices must complete the range of works on a dual fuel meter exchange. The scope of the exchange must include:

- decommission and removal of retiring meter systems
- installation and commission of new Smart Meter System including gas and electric meters
- maintenance of existing metering equipment – Isolator blocks, cables, fuse and fuse carrier, meter regulator, meter bracket

The portfolio must also contain evidence that has been clearly mapped by the apprentice to six groups of criteria:

1. Maintaining Safety Standards
2. Risk Awareness and Risk Monitoring
3. Customer Care and Welfare
4. Communicating and Working with Others
5. Effective Completion of Works
6. Personal and Team Development

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Please confirm all required elements are covered:

1: Maintaining Safety Standards

Core skill and behaviour to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **S2** Take personal responsibility for maintaining safety standards and achieving job objectives	☐
Explain how the apprentice will meet: **B1** Have personal wellbeing and the safety of customers and others as a priority	☐

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2: Risk Awareness and Risk Monitoring

Core skill and behaviour to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **S1** Carry out a thorough and rigorous risk assessment to ensure safety of customer, self and property on arrival, during install and upon exit	☐
Explain how the apprentice will meet: **B2** Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations	☐

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3: Customer care and welfare

Core knowledge, skill and behaviour to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **K6:** Knowledge of Smart metering systems to be able to discuss and advise the customer	☐
Explain how the apprentice will meet: **S6:** Work on customer premises/property showing appropriate care, respect whilst focussing on safety	☐
Explain how the apprentice will meet: **B5:** Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability	☐

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4: Communications and Working with others

Core skill and behaviour to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **S7:** Use a variety of appropriate communication methods to interact with customers and others to give/receive information accurately, in a timely and positive manner to deliver the best possible experience to customers. This will include practical advice and the benefits of using the equipment	☐
Explain how the apprentice will meet: **B4:** Work effectively with people from different trades/disciplines, backgrounds, and expertise to accomplish an activity safely, on time, providing confident challenge whilst meeting customer requirements	☐

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5: Effective Completion of Works

Core knowledge, skill and behaviour to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **K2:** The apprentice demonstrates the gas and electrical testing & assessment procedures needed to establish the condition of the equipment and installation and the actions needed as a result	☐
Explain how the apprentice will meet: **S3:** Uses tools, equipment, and personal protective equipment in a safe and appropriate manner	☐

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Core knowledge, skill and behaviour to be covered in the task	Covered on activity
Explain how the apprentice will meet: **S4:** Install, exchange, commission, decommission and ongoing maintenance of Smart metering systems, associated equipment, and communication systems in accordance with industry standards (SMICoP V7.2)	☐
S10: Prepare and sequence equipment and tasks in the order prescribed in relevant operational standards or according to a specific regulation or set of rules	☐

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6: Personal and Team Development

Core skill to be covered in the task	Covered on activity
Please use the space below to provide a summary of the planned work observation activities for each criteria.	
Explain how the apprentice will meet: **S9:** Achieve individual and team tasks which align to overall work objectives, be self- motivated and disciplined in the approach to work tasks	☐

Practical Task Variations - Describe how you can vary this task/s to ensure that the assessment does not become predictable. **Variation 1:** **Variation 2:** **Variation 3:**
Specific requirements (for example: authorisations/access arrangements/PPE):
Apprentices must be provided with both written and verbal instructions on the tasks they must complete including timescales. Written instructions included: ☐ Verbal Instructions Included: ☐

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Remember:

- The specific detail of the tasks to be undertaken should be **kept confidential from the apprentices**

Practical Task: Include relevant photographs to illustrate task(s)

Energy & Environment Awards Office use only

Date received	
Date signed off	

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Appendix D: Practice Workplace Observation Template

Employers/training providers are recommended to arrange for apprentices to carry out a practice Work Observation prior to end-point assessment. The form below is for use by the person playing the part of the technical expert.

Apprentice full name					
Employer, Location Postcode or Assessment Centre Location					
Work Observation Location					
Full name of apprentice's line manager/trainer, safety or quality assurance engineer					
Apprentice's line manager/trainer, safety or quality assurance engineer details - include employer, job role, email address and phone number					
Date of Work Observation		Start Time		End Time	

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Component 1: Portfolio: Workplace Observation

Introduction

Apprentice's undertaking the ST0158 Work Observation must complete the range of works on a dual fuel meter exchange. The scope of the exchange will include:

- Decommission and removal of retiring meter systems
- Installation and commission of new Smart Meter System including gas and electric meters
- Maintenance of existing metering equipment – Isolator blocks, cables, fuse and fuse carrier, meter regulator, meter bracket

How to use this document

Each part of the document has a numbered Section (1 – 6).

1. You must design questions and supplementary questions which would be asked by the line manager/trainer, safety or quality assurance engineer as the work observation progresses.
2. Completion of each element of the works is recognised by providing a summary of the activity witnessed. Where the Apprentice does not complete a required element, then supplementary questioning may be used, the details of which should be recorded.
3. Each section has a comments area where the activities carried out within that particular section are summarised, highlighting any Distinction level performance from the Apprentice if this occurs.
4. The Line manager/trainer, safety or quality assurance must record areas of underperformance and suggest an action plan to address the circumstances, extending the summary box as required.

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Scoring:

The work observation is graded out of 100. The minimum mark must be achieved for each section. The total score will be multiplied by a factor of 0.2 to achieve the overall mark for the work observation. This mark will be used when calculating the final grading of the Portfolio of Evidence' element of the End-point Assessment. Once all of the elements have been observed and the marks awarded the employer technical expert will recommend a preliminary grade for the independent examiner. The apprentice must be able to demonstrate the following core KSBs in an integrated way.

Portfolio: Work Observation: Scoring Summary

Group No.	Work Observation Performance Element	Criteria	Marks Available	Minimum Score
1	Maintaining Safety Standards	S2 / B1	15	12
2	Risk Awareness and Risk Monitoring	S1 / B2	15	12
3	Customer Care and Welfare	K6 / S6 / B5	15	12
4	Communications and Working with Others	S7 / B4	15	12
5	Effective Completion of Works	K2 / S3 / S4/ S10	35	30
6	Personal and Team Development	S9	5	2
Total			**100**	**80**

The apprentice must be able to demonstrate the following core KSBs in an integrated way. The technical expert will be marking against the following criteria during the work observation:

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Group 1: Maintaining Safety Standards

S2 Take personal responsibility for maintaining safety Standards and achieving job objectives			
Assessor must ask the following standardised questions.		**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*			
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**			
Fail	☐	**Pass**	☐

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B1 Have personal wellbeing and the safety of customers and others as a priority		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 2: Risk Awareness and Risk Monitoring

S1 Carry out a thorough and rigorous risk assessment to ensure safety of customer, self and property on arrival, during install and upon exit					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B2 Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 3: Customer Care and Welfare

K6 Knowledge of Smart metering systems to be able to discuss and advise the customer		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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S6 Work on customer premises/property showing appropriate care, respect whilst focusing on safety		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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B5 Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 4: Communicating and Working with others

S7 Use a variety of appropriate communication methods to interact with customers and others to give/receive information accurately, in a timely and positive manner in order to deliver the best possible experience to customers. This will include practical advice and the benefits of using the equipment					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B4 Work effectively with people from different trades/disciplines, backgrounds and expertise to accomplish an activity safely, on time, providing confident challenge whilst meeting customer requirements		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 5: Effective Completion of Works

K2 Gas and electrical testing and assessment procedures needed to establish the condition of the equipment and installation and the actions needed as a result					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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S3 Use tools, equipment and personal protective equipment in a safe and appropriate manner		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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S4 Install, exchange, commission, decommission and ongoing maintenance of Smart metering systems, associated equipment and communication systems in accordance with industry standards					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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S10 Prepare and sequence equipment and tasks in the order prescribed in relevant operational standards or according to a specific regulation or set of rules					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 6: Personal and Team Development

S9 Achieve individual and team tasks which align to overall work objectives, be self- motivated and disciplined in the approach to work tasks					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Appendix E: Practice End-point Interview Template

Employers/training providers are recommended to arrange for apprentices to carry out an End-point Interview prior to end-point assessment. The form below is for use by the person playing the part of the technical expert.

Apprentice full name	
Employer, Location Postcode or Assessment Centre Location	
End-point Interview Location	
Full name of apprentice's line manager/trainer, safety or quality assurance engineer	
Apprentice's line manager/trainer, safety or quality assurance engineer details - include employer, job role, email address and phone number	
Date of Work Observation	
Start Time	
End Time	

The end-point interview is graded out of 100. The minimum mark must be achieved for each section. This mark will be used when calculating the final grading of the end-point interview. The employer technical expert will recommend a preliminary grade for the independent examiner. The apprentice must be able to demonstrate the following core KSBs in an integrated way. The technical expert will be marking against the following criteria during the end-point interview:

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Group 1: Maintaining Safety Standards

Legislation/Regulations and Standards/Codes of Practice

K1 Current Health, Safety and Environmental legislation and regulations applicable to work in the gas and power industries					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B5 Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B1 Have personal wellbeing and the safety of customers and others as a priority					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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K7 Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 2: Risk Awareness and Risk Monitoring

S1 Carry out a thorough and rigorous risk assessment to ensure safety of customer, self and property on arrival, during install and upon exit					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B2 Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 3: Customer Care and Welfare

K5: Up to date knowledge of energy efficiency principles to be able to provide advice and guidance to the customer					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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K6: Knowledge of Smart metering systems to be able to discuss and advise the customer					
Assessor must ask the following standardised questions.			**Recording timeline.**		**Mark awarded.**
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B3: Be Energy Aware and deliver appropriate advice to customers on energy efficiency					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B5: Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 4: Communicating and Working with Others

S7: Use a variety of appropriate communication methods to interact with customers and others to give/receive information accurately, in a timely and positive manner in order to deliver the best possible experience to customers. This will include practical advice and the benefits of using the equipment					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B4: Work effectively with people from different trades/disciplines, backgrounds and expertise to accomplish an activity safely, on time, providing confident challenge whilst meeting customer requirements					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 5: Effective Completion of Works

5a) Electrical Meter Exchange) NB: All criteria below relate to the Electrical installation only.

K2 Electrical testing and assessment procedures needed to establish the condition of the equipment and installation and the actions needed as a result					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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K3 Gas and electrical theories and procedures involved in the practical application of installation, exchange, commission, decommission and maintenance of Smart metering systems and associated equipment and communication systems					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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K4 Relevant electrical/mechanical principles and how they are applied in work processes and procedures					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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S4 Install, exchange, commission, decommission and ongoing maintenance of Smart metering systems, associated equipment and communication systems in accordance with industry standards		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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S8 Identify where situations or conditions are to unsafe standards and take appropriate actions within your range of competency		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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B1 Have personal wellbeing and the safety of customers and others as a priority					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B2 Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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B5 Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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5b) Gas Meter Exchange NB: All criteria below relate to the Gas installation only.

K2 Gas testing and assessment procedures needed to establish the condition of the equipment and installation and the actions needed as a result					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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K3 Gas and electrical theories and procedures involved in the practical application of installation, exchange, commission, decommission and maintenance of Smart metering systems and associated equipment and communication systems		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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S4 Install, exchange, commission, decommission and ongoing maintenance of Smart metering systems, associated equipment and communication systems in accordance with industry standards					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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S8 Identify where situations or conditions are to unsafe standards and take appropriate actions within your range of competency					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B1 Have personal wellbeing and the safety of customers and others as a priority					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B2 Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations		
Assessor must ask the following standardised questions.	**Recording timeline.**	**Mark awarded.**
Questions *Develop some open ended questions*		
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**		

Fail	☐	**Pass**	☐	**Distinction**	☐

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Group 6: Personal and Team Development

S9: Achieve individual and team tasks which align to overall work objectives, be self-motivated and disciplined in the approach to work tasks					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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B6: Maintain and develop personal learning plans to continually develop knowledge and competence					
Assessor must ask the following standardised questions.			**Recording timeline.**	**Mark awarded.**	
Questions *Develop some open ended questions*					
Apprentice's Line Manager/Trainer, Safety or Quality Assurance Engineer Summary (must record all additional questions asked for clarification and the responses provided by the apprentice including examples)**:**					
Fail	☐	**Pass**	☐	**Distinction**	☐

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Appendix F: Portfolio Mapping Document

Portfolio Mapping Document

This document must be placed at the front of the portfolio and submitted to Energy & Environment Awards with the portfolio of evidence.

Introduction

Use this document to map the portfolio of evidence to the KSBs assessed during the professional discussion.

Apprentice's next steps

1. Complete all the details on the first page and include employer details of where relevant competencies from their experience at work was gained.
2. The apprentice can use a number of different types of evidence to demonstrate their competence as described in Section 5 of the Specification – 'What to include in the portfolio?'. For further guidance, the apprentice must seek advice from their tutor/supervisor/mentor and training provider.
3. Map evidence to the criteria in the following pages using a referencing system indicating where the evidence for the criteria is located in the portfolio e.g., work based evidence Job 1 (J1) page 5 paragraph 2. This will allow the independent assessor to locate the section or specific piece of evidence being discussed and referred to during the professional discussion.
4. Place the portfolio mapping document at the front of the portfolio of evidence.

The apprentice's training provider must make arrangements for Energy & Environment Awards to have access to the apprentice's portfolio including the portfolio mapping document at least 2 weeks before the professional discussion. For apprentices using e-portfolio such as ONEFILE, SMARTASSESSOR, the reference used must simply be the file or folder name you used when uploading the evidence to such systems.

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Portfolio Mapping Document

1.1 Mapping Sign off on Portfolio Completion:

Apprentice Name (Print)	Apprentice Signature	Training Provider (Company)	Training Provider Signatory	Date of Sign Off

Core Knowledge

Ref. (KSB)	Apprenticeship Standard Criteria	Portfolio EVIDENCE REFERENCE (Apprentice Input)		
		1	2	3
K1	Current Health, Safety and Environmental legislation and regulations applicable to work in the gas and power industries			
K2	Gas and electrical testing and assessment procedures needed to establish the condition of the equipment and installation and the actions needed as a result			
K3	Gas and electrical theories and procedures involved in the practical application of installation, exchange, commission, decommission and maintenance of Smart metering systems and associated equipment and communication systems			
K4	Relevant electrical/mechanical principles and how they are applied in work processes and procedures			
K5	Up to date knowledge of energy efficiency principles to be able to provide advice and guidance to the customer			
K6	Knowledge of Smart metering systems to be able to discuss and advise the customer			

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Ref. (KSB)	Apprenticeship Standard Criteria	Portfolio EVIDENCE REFERENCE (Apprentice Input)		
		1	2	3
K7	Current regulatory compliance, the recognition of different customer needs including vulnerability as defined by Office of Gas and Electricity Markets (OFGEM) and Smart Installation Codes of Practice (SMICoP)company rules, policies and procedures as defined by the employer			

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Core Skills

Ref. (KSB)	Apprenticeship Standard Criteria	Portfolio EVIDENCE REFERENCE (Apprentice Input)		
		1	2	3
S1	Carry out a thorough and rigorous risk assessment to ensure safety of customer, self and property on arrival, during install and upon exit			
S2	Take personal responsibility for maintaining safety standards and achieving job objectives			
S3	Use tools, equipment and personal protective equipment in a safe and appropriate manner			
S4	Install, exchange, commission, decommission and ongoing maintenance of Smart metering systems, associated equipment and communication systems in accordance with industry standards			
S5	Work with focus and clear purpose in all conditions and locations, covering business requirements, usually working alone and safely adapt working methods to reflect changes in working environment			
S6	Work on customer premises/property showing appropriate care, respect whilst focusing on safety			
S7	Use a variety of appropriate communication methods to interact with customers and others to give/receive information accurately, in a timely and positive manner in order to deliver the best possible experience to customers. This will include practical advice and the benefits of using the equipment			
S8	Identify where situations or conditions are to unsafe standards and take appropriate actions within your range of competency			

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Ref. (KSB)	Apprenticeship Standard Criteria	Portfolio EVIDENCE REFERENCE (Apprentice Input)		
		1	2	3
S9	Achieve individual and team tasks which align to overall work objectives, be self- motivated and disciplined in the approach to work tasks			
S10	Prepare and sequence equipment and tasks in the order prescribed in relevant operational standards or according to a specific regulation or set of rules			

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Core Behaviours

Ref. (KSB)	Apprenticeship Standard Criteria	Portfolio EVIDENCE REFERENCE (Apprentice Input)		
		1	2	3
B1	Have personal wellbeing and the safety of customers and others as a priority			
B2	Be risk aware showing the desire to reduce risks through systematic monitoring and checking information and the strict compliance with appropriate rules and regulations			
B3	Be energy aware and deliver appropriate advice to customers on energy efficiency			
B4	Work effectively with people from different trades/disciplines, backgrounds and expertise to accomplish an activity safely, on time, providing confident challenge whilst meeting customer requirements			
B5	Deliver a polite, courteous professional service to all customers and members of the public whilst safeguarding customer welfare and recognising vulnerability			
B6	To maintain and develop personal learning plans to continually develop knowledge and competence			

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