

# Handbook 2025

# IFA DIRECT.®



<b>Welcome to IFA Direct .....</b>	<b>3</b>
<b>IFA Direct Entry requirements.....</b>	<b>4</b>
<b>Enrolling on the IFA Direct programme .....</b>	<b>4</b>
<b>Timescale for completion of your programme of study.....</b>	<b>5</b>
<b>Recognition of prior learning (RPL).....</b>	<b>6</b>
<b>Online self-paced learning .....</b>	<b>7</b>
<b>What support is available? .....</b>	<b>7</b>
<b>Assessments.....</b>	<b>8</b>
<b>Refunds, Withdrawal, Deferral and Extension.....</b>	<b>8</b>
<b>Certification .....</b>	<b>9</b>
<b>Transcripts.....</b>	<b>9</b>
<b>Working in public practice.....</b>	<b>9</b>
<b>Pathway to membership .....</b>	<b>9</b>
<b>The Institute of Financial Accountants and ATHE .....</b>	<b>9</b>
<b>Need Help?.....</b>	<b>10</b>

# Welcome to IFA Direct

It is with pleasure that we welcome you on to the IFA Direct programme whether it is to obtain membership of the IFA, upgrade your membership or to enhance your knowledge through continuing professional development (CPD).

The IFA Direct programme consists of relevant, affordable and accessible study units which will enhance your professional reputation. By developing your knowledge and skills you will gain a broader and deeper understanding of key subjects relevant to accountants and tax advisers, in or supporting, small businesses.

IFA Direct is administered in partnership with ATHE, a global awarded organisation regulated by Ofqual. The programme comprises of 14 flexible study units which are delivered online through a network of ATHE recognised centres.

Study time for one unit can take around 4-6 weeks, but you can study more than one unit a time. You can roll off one straight unit to another meaning you never have to wait before starting a new subject, At the end of each unit you will complete a final assessment set by your centre.

Each unit is available as a self-paced online programme full of interactive resources, and access to tutorial support throughout your study.

We understand that everyone learns differently, and that's why we are dedicated to supporting you in your learning journey. The units are designed with the understanding that learners will bring with them a diversity of backgrounds and experiences. As a competency-based programme, we use a range of engaging and real-world assessments to guarantee that all graduates have the skills and knowledge required for the careers of the future.

Thank you for choosing the IFA Direct Programme to partner in your professional development and education.

We hope you enjoy the programme.

# IFA Direct Entry requirements

Before you apply to study, please ensure you meet our eligibility criteria.

## Minimum requirements for study

- 2 A level passes or equivalent PLUS 5 GCSEs/vocational GCSEs/GCE/O level passes (grades 9-4/A-C) or equivalent in five separate subjects including mathematics and English.
- Level 3 book-keeping or accounting qualification which includes the [ATHE Level 3 Diploma in Accounting](#).

## Language

Learners must also have an appropriate standard of English to enable them to access relevant resources and complete the unit assignments.

Students whose first language is not English will need to provide evidence of having completed an English language qualification or may need to undertake the [IELTS](#) English language test and achieve a grade of 5.5 or above.

If you do have previous experience and qualifications, you may also to be invited to apply for IFA Intermediate grade of membership while you are study to gain the IFA's Associate grade of membership.

## Enrolling on the IFA Direct programme

The steps below outline the enrolment process you'll follow.

### Step 1

Provide your certificates, transcripts and curriculum vitae to [education@ifa.org.uk](mailto:education@ifa.org.uk) or your local member growth team representative and confirm whether:

- (a) You are in public practice
- (b) You wish to go into public practice
- (c) Access to membership only

### Step 2

Our education team will assess your documents and provide you with a personalised pathway based upon your requirements and you will be asked to do the following.

- (a) Fully complete the application form.
- (b) Confirm the ATHE recognised centre you wish to study with according to the list of centres detailed on the IFA website. It is your responsibility to choose the centre you wish to study with to ensure that it meets your individual learning requirements. Details of centres can be found at [Centres](#).
- (c) Certify your transcripts, certificates and ID as described in the application form and send them to [education@ifa.org.uk](mailto:education@ifa.org.uk) along with your curriculum vitae.

(d) Provide payment details within the application fee for the IFA Direct registration fee of £60.

#### **Step 4**

We will register you at the IFA on the programme and we will advise your chosen centre who will make contact with you and you will be asked pay the learner fee of £320 + VAT per unit.

You should allow up to 10 working days from payment of the IFA Direct registration fee and our receipt of all associated certified documents to being contacted by your chosen centre.

Please note that you can choose to study and pay on a unit basis or study and pay for more than one unit at a time based upon your own requirements.

### **Timescale for completion of your programme of study**

All units come with a recommended timeframe required for completion, with a maximum of 6 months available to complete each unit.

Please note you will have 3 years to complete all the units that have been identified for you to study. If you do not complete the units in the required timeframe you will be withdrawn from the programme.

In certain circumstances, you may be asked to complete the required units in a shorter space of time. If that is the case we will confirm with you prior to your registration.

We will consider extenuating circumstances prior to withdrawing your enrolment on the programme but this needs to be in writing to the education team at [education@ifa.org.uk](mailto:education@ifa.org.uk).

All students are required to confirm that they have read and understood this Handbook as part of their enrolment.

#### **Digital literacy**

All study is online and requires a basic level of digital literacy in the following areas:

- using the internet
- using Microsoft Word and Excel
- unzipping documents
- using the centre's online portal

It is important that you understand these areas to be able to study effectively and gain the maximum benefits from the programme.

If you are not totally confident that you have the relevant digital knowledge and skills, we strongly recommend you take this [digital literacy test](#).

These tests are provided under:

- Essential computer skills
- Essential software skills

#### **What if I'm not ready for IFA Direct?**

For those not ready for IFA Direct, the [ATHE Level 3 Diploma in Accounting](#) is a pathway to joining our online education programme and gaining membership.

### **Post-IFA Direct study**

Once you've completed IFA Direct you can study the [ATHE Level 7 Extended Diploma in Accounting and Finance](#) which provides a progression route to the [University of Bolton's MSc in Accountancy and Financial Management top up](#) (online) through WINC London.

We want you to feel fully supported and confident as you progress in your learning journey with us. Our dedicated team is here to help and guide you at every step and provide a positive and encouraging learning environment.

## **Recognition of prior learning (RPL)**

The IFA Direct Programme has been designed to balance the need to deliver professional requirements by appropriately recognising the prior learning of existing applicants and the broader professional community with relevant professional experience and qualifications. The IFA team will assess your documents for Recognition of Prior Learning (RPL) across the IFA Direct programme and you will be provided with a tailored route based upon your personal and professional requirements.

Please note that if you are seeking a practising certificate alongside membership of the IFA you will not be offered membership until you have achieved both the educational and professional experience requirements. Where your qualifications were achieved outside the UK you will be required to undertake all the tax and law units as a minimum even if these subject areas formed part of your qualifications.

## Online self-paced learning

All IFA Direct units are designed for online and self-paced learning to provide you with the utmost flexibility and convenience to embark on your professional educational journey. We understand that professionals like you, who may be stay-at-home parents, employees, carers, or those with busy schedules, require a learning approach that fits seamlessly into your life. The online learning platform available through your chosen centre is tailored to cater to these needs, allowing you to commence your course whenever and wherever it suits you, and complete your unit at your own pace.

We believe that online learning has the potential to empower individuals to achieve their educational goals, and we are here to support you throughout your learning experience. If you would like to discuss your pathway or journey please contact the education team at [education@ifa.org.uk](mailto:education@ifa.org.uk) or + 44 (0) 20 3567 5836

We value your feedback immensely, and your insights play a crucial role in our continuous improvement process. Throughout the IFA Direct Programme, we actively seek feedback from participants like you, allowing us to refine our offerings and ensure your learning experience is nothing short of exceptional.

## What support is available?

Your chosen centre will provide an individual 'roll-on roll-off' learning plan and will support and guide you throughout your studies. There is no need to worry about arranging your assessment either. Your centre will do that for you and answer any questions you may have.

Throughout your study you'll receive online tutorial support from an expert academic adviser

Units incorporate online lectures and resources, personalised learning plans, videos, e-books, and presentations all delivered through the centre's secure online portal.

Please bear in mind that while the centre's trainers are always available to support you, they cannot provide direct answers to assessment questions, nor can they offer feedback on draft assessment submissions. Instead, we encourage you to focus your questions on the learning materials and how to grasp the key concepts and competencies effectively

## **Assessments**

At the end of each unit the ATHE recognised centre you are studying with will send you a set piece of written work to complete and submit online

The assessment provided by your centre will give you an opportunity to demonstrate both your knowledge and skills of a topic and how you might apply that knowledge in a given context.

### **Achieving a pass, merit or distinction**

#### **Pass**

To achieve a pass you must successfully achieve the learning outcomes at the pass standard as set by the assessment criteria for the unit. The assessment criteria is detailed in the individual syllabus which you can find on the syllabus aims page.

#### **Merit**

To achieve a merit you must work to meet the pass standard and also demonstrate that you have achieved the additional criteria set for the unit as detailed in the individual syllabus.

#### **Distinction**

To achieve a distinction you must work to meet the pass and merit standards and also demonstrate that you have achieved the additional criteria set for the unit as detailed in the individual syllabus. Further details on the qualification grading structure and how overall grades are determined can be found in the qualification specifications available via the [ATHE website](#).

### **Assessment results**

You will receive final results 4-6 weeks from submission of your final assignment.

## **Refunds, Withdrawal, Deferral and Extension**

In some instances, your circumstances may change, and this could affect your ability to successfully start or complete a unit. You must advise the IFA Education Manager in writing if you are unable to successfully complete your course/qualification via [education@ifa.org.uk](mailto:education@ifa.org.uk).

The IFA Direct registration fee is a non-refundable payment to the IFA. If you are seeking a refund for the unit fee made directly to the centre you will need to apply directly to your chosen centre. We do understand that circumstances often change unexpectedly, so please contact us with any extenuating personal or professional circumstances and we will work with you and the centre for a solution to defer your commencement or extend your enrolment.



## **Certification**

Once you complete your unit your chosen centre will issue you with an Ofqual regulated unit certificate. They will also advise the IFA of your result so that we can update your record with us and your pathway to membership. You will be able to see your results on your dashboard page of the IFA website.

## **Transcripts**

If you would like to receive a transcript for the units you have completed please contact the education team at [education@ifa.org.uk](mailto:education@ifa.org.uk).

## **Working in public practice**

If it is your intention to go into public practice and you wish to apply for a practising certificate it is your responsibility to advise the IFA of your status. Please note that if you are currently a student of the IFA and you start to offer accountancy services to the public, it is your responsibility to advise the IFA of your changed status, otherwise you will be in breach of the IFA byelaws and may be liable for disciplinary action. Please note you can no longer be classed as a student with the IFA or refer to yourself as such. In this circumstance, you can continue to undertake the units as detailed in the next paragraph.

If you are currently in practice you can take the appropriate units identified as continuing professional development but you will need to ensure you have the appropriate alternative AML supervision in place during this time. However, you are not permitted to claim that you are in any way supervised by the IFA for AML supervision, nor are a member or student of the IFA.

## **Pathway to membership**

Once you have completed all the identified units for your chosen pathway you will be invited to apply for membership.

The membership application and exemption fee will be waived if you take out membership within 6 months of completing the IFA Direct programme.

If you do not take up the offer of membership within this period, the application and exemption fee will not be waived and we cannot guarantee your route to membership and we will need to reconfirm your pathway.

## **The Institute of Financial Accountants and ATHE**

ATHE is a global awarding organisation regulated by Ofqual and other UK and international regulators. ATHE work with over 230 centres in 50 countries to complement a strong brand presence in the UK.

The IFA partners with ATHE to provide the delivery of the IFA Direct programme. Your choice of ATHE recognised centre will support you in registration on the unit, course delivery and support by industry expert trainers, and technical and administrative support for all learners.

You will also need to comply with all student regulations laid down by ATHE as the awarding organisation.

## Need Help?

We are here to support and provide guidance for prospective and current learners on the IFA Direct programme with any queries you may have

Call us on + 44 (0) 20 3567 5836 or email the Education team at [education@ifa.org.uk](mailto:education@ifa.org.uk)

Alternatively, check out our website [www.ifa.org.uk/learning/ifadirect](http://www.ifa.org.uk/learning/ifadirect)

This IFA Direct Programme Handbook is subject to change. The current version of the handbook will always be available on our website.

