



# External Examiner User Guide

## Taught Provision

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# Introduction

This guidance document is for External Examiners appointed by University of Essex departments and aims to provide operational guidance on a number of online systems the University provides to support External Examiners in their role.

This guidance is aimed at External Examiners who have completed the appointment process and have been issued and returned their contract. External Examiners who have not yet submitted their online application to the role should refer to the [External Examiner New User Registration](#) guidance instead.

Information on the responsibilities of External Examiners are available on the [Quality and Academic Development webpages](#).

## Directory of online resources

This section summarises the key systems that you may be required to access as an External Examiner for the University of Essex. Please note that systems used to share assessment materials can differ across University departments. The below systems are the most commonly utilised but, excepting the Report Portal which is universally used, you may not be asked to access all of these. If you are in doubt over which systems you need to access, please contact your appointing Department in the first instance.

- [FASER \(Feedback Assessment Submission Electronic Repository\)](#) is the University's online coursework submission, assessment and feedback service. To request guidance on how to use FASER, please e-mail your Departmental admin contact.
- [Moodle](#) is the University of Essex's Virtual Learning Environment (VLE); a web platform designed specifically to support the delivery of teaching and learning materials and activities. To request guidance on how to use Moodle, please e-mail your Departmental admin contact.
- [Box](#) is the University's official cloud storage and collaboration platform for staff and students. To request guidance on how to use Box, please e-mail your Departmental admin contact or refer to the guidance materials within your Box folder.
- The [External Examiner Report Portal](#) is an online submission system for External Examiner reports. All External Examiners are required to submit reports through the online Portal no later than four weeks after the date of their final Board of Examiners. To request guidance on how to use the Report Portal, please email Quality and Academic Development team on [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk), or refer to the [systems guidance](#).

# Your University of Essex account

Once a new External Examiner has returned their signed contract and payroll form to [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) they will be added to the University of Essex HR systems as a University employee and an institutional log-in will be generated.

Your University of Essex log-in will be used for accessing password-secured online systems and will be needed for accessing Board of Examiners meetings held via video call. As part of the activation process, you will set up an automatic forwarding address so any messages directed to your Essex email will be automatically redirected to a registered personal email address. You will not need to check an additional inbox for University of Essex matters.

## Activating your account

A member of the Quality and Academic Development team will contact you with instructions on activating your University of Essex account once it has been generated. The University will require your signed contract to have been returned before your account can be generated.

You will be informed of your Personal Record Identifier (PRID). This is a set of numbers and letters that the University uses to uniquely identify all students and staff e.g., SMITH12345. You need your PRID to access some University services so please keep a record of this, or contact [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) to be reminded of it.

- Access the following link to [get your Essex IT account details](#). Please input your PRID as it appears in this email and click **Submit**.
- You will then be asked to **provide an external email address and passphrase**. Your external email address and passphrase is separate to your Essex email address and password and can be used to reset your Essex password if you forget it. Emails sent to your Essex email address will automatically be forwarded to your external email address.
- On the following page, please input your personal details exactly as previously supplied to us. All fields on this page are case-sensitive, so this stage will not work if the personal information you supply does not match that which we have on record.

Provide an external email address and passphrase	
External email address: *	<input type="text"/>
Passphrase: *	<input type="text"/>
Please note: Passphrase needs to be between 8 and 20 characters.	
Confirm passphrase: *	<input type="text"/>
Security question: *	<input type="text"/>
Answer to security question: *	<input type="text"/>
Date of birth: *	Day: <input type="text"/> Month: <input type="text"/> Year: <input type="text"/>
PRID: *	<input type="text"/>
Surname: *	<input type="text"/>
Please note: EXACTLY as registered with the University	
Forenames: *	<input type="text"/>
Please note: EXACTLY as registered with the University - including any middle name(s)	

\* mandatory

- Having completed this online form, your registered email address will receive an email containing a link. Please click on this link to activate your external email address.
- Having activated your external email address, please then revisit [this page](#) to **obtain your University login and password via previously registered email address and passphrase.**

Obtain your University login and password via previously registered email address and passphrase	
Email address:	<input type="text"/>
Passphrase:	<input type="text"/>
<input type="button" value="RETRIEVE LOGIN AND PASSWORD"/>	

- Login using your external email address and passphrase – the site will then inform you of your Essex login and your initial password.
- Having obtained your login and password, please ensure that you [sign up to our rules and regulations for IT usage](#) – until you have done so, your account will be inactive.
- You should also consider [changing your Essex password](#) to something more memorable.
- Your link department may have asked, or intend to ask, for you to access materials via Box. Access to this system can be requested via [this online form](#)

# Managing your University of Essex account

Your University of Essex email address acts as your username for any password-restricted systems. If you have difficulties logging in to any systems, please try your email address both with and without the @essex.ac.uk suffix.

If you have forgotten your University of Essex email address, these are listed on the [University staff directory](#). Please search for your own name to bring up your details.

If you need to change the personal email registered as the forwarding address for your Essex email, you can [manage your personal details from this webpage](#).

## Your password

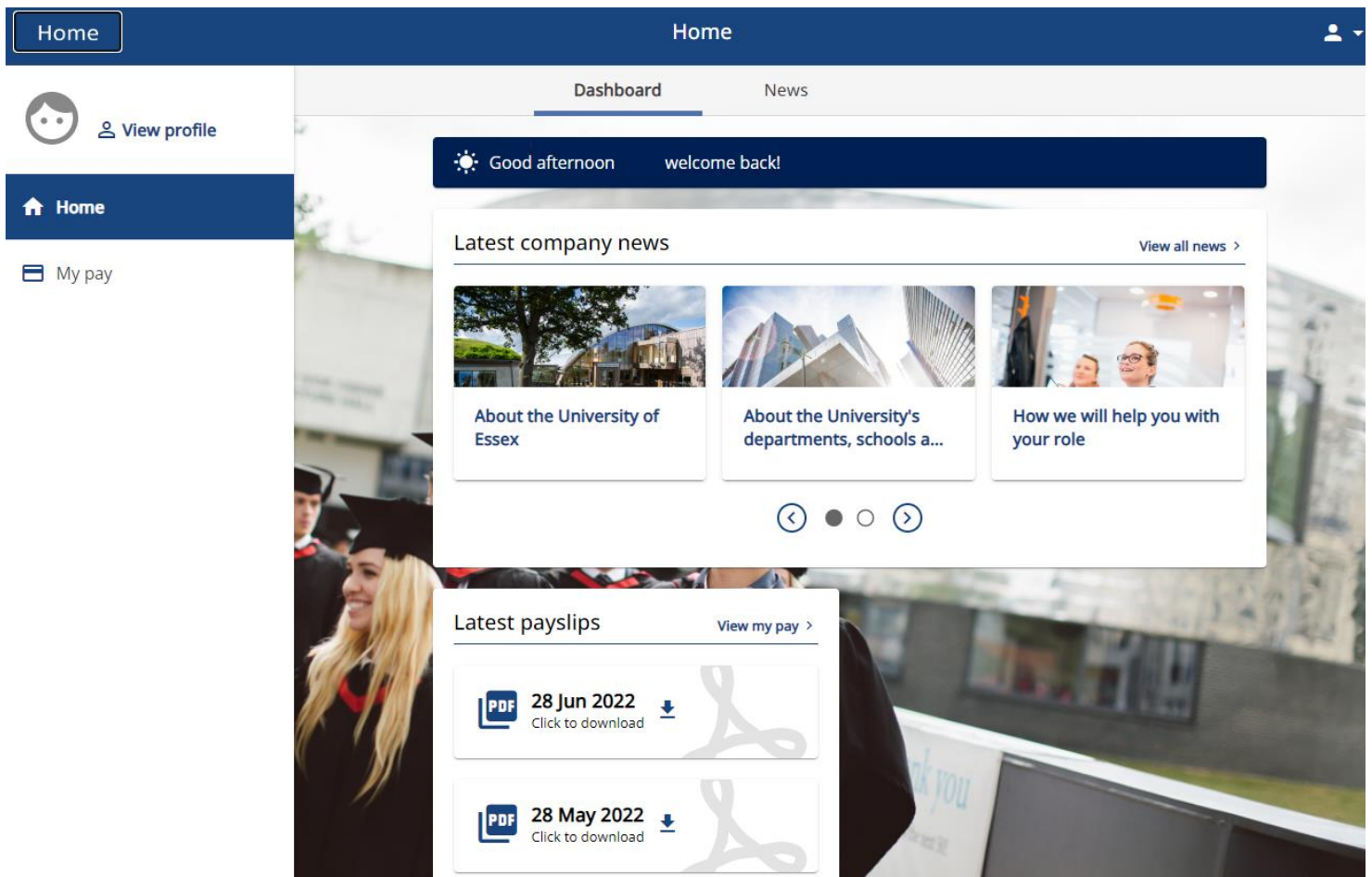
If you have forgotten your University of Essex password, you can [request a one-time password be sent to your registered mobile phone or external email address](#).

To reset your password in this fashion, you will need to enter your Personal Identifier (or PRID). This will have been supplied to you at the start of your appointment. If you do not have a record of this, please e-mail the [Quality and Academic Development team](#) and they will be able to inform you of your PRID.

If you have any other questions about your password or log-in credentials, please email the [Quality and Academic Development team](#).

# HR Organiser

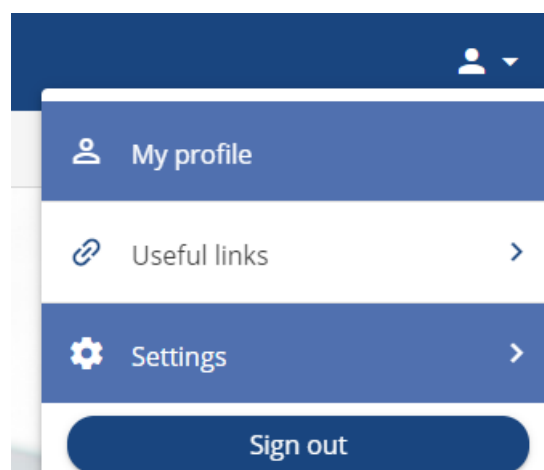
Your details will be held in the University of Essex's Human Resources management system: [HR Organiser](#) which can be accessed at any time to check or update the personal information held by the University. You will need your Essex login details in order to access the system.



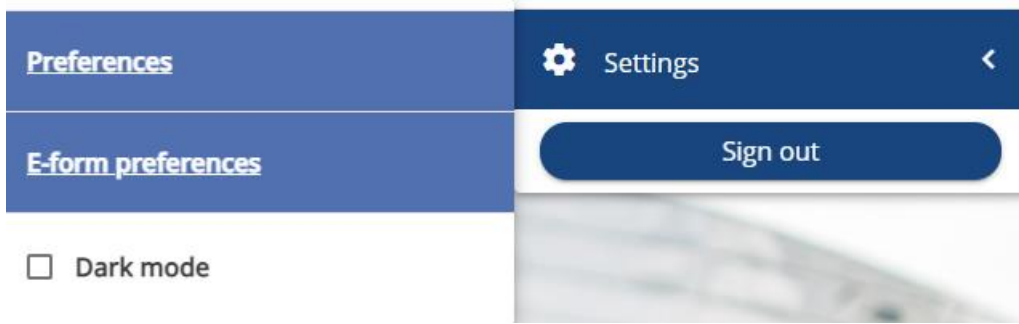
## Payslips and other financial information

The above screenshot illustrates the homepage of HR Organiser. Your payslips can be downloaded from the **Latest payslips** section at the bottom of the screen, or else click **View my pay** to access older payslips and any P60s. External Examiners responsible for postgraduate taught provision should note that tax is not deducted at source for their fees, and their P60s will appear as blank.

If you would like to set up your account so that payslips are automatically forwarded to your external email address and you do not need to access HR Organiser each year to individually download each payslip, click on the icon in the top right corner of the screen and select **Settings**.



Select **E-form preferences**.



On the **E-form preferences screen**, ensure **Email payslip** is checked and enter an email address for payslips to be sent to, and your password for accessing them. Click **Save** to apply these preferences.

### E-form preferences

Close X



The payslip/P60 passwords can only use the characters A-Z, a-z, 0-9, or ! " \$ % ^ & \* ( ) - \_ + [ ] { } ? , . ; @ # ~ / | \ < > ` ' :



Print payslip



Email payslip

\* Email address (required)

\* Password for payslip (required)



\* Confirm password (required)



### P60 options



Print P60

Save

Cancel



## Update your personal details

If you would like to update any of the personal details the University holds on record, click on the **View profile** link in the top left of the HR Organiser home screen.



From the **My personal details** screen you can update the home address, mobile telephone, and/or personal email address we hold on record. If your primary work has changed and you have moved to a different home institution, please inform [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) directly via email.

If your external email address has been changed, please also update the automatic forwarding contract for your Essex email address via [this webpage](#).

The screenshot shows two main sections of the user interface. The top section, titled 'My personal details', includes a profile picture placeholder, the text 'Name:', and a 'View attachments' link. To the right is a 'Confidential information' section with a prompt to 'Select the links below to view or amend your information' and a 'Sensitive information >' link. The bottom section, titled 'Contact information', contains five input fields: 'Primary address - Mailing Address:', 'Secondary address - Address:', 'Mobile telephone:', 'UoE E-mail address (automatic):', and 'User e-mail address:'. At the bottom of this section are two blue buttons: '+ Add address' and '+ Add contact details'.

If you wish to update your bank details, blank payroll forms can be downloaded from the University of Essex [Human Resources webpages](#). Once the form has been filled out with your updated bank details, click on **View attachments**, and then **Add attachment**.

Enter a name for the document (e.g. your name/updated bank details), select **EE – Bank details** as the document type, and upload the new payroll form. Click **Save**.

### Document attachment details

Close X

\* Document name (required)

Document type

Link

No file selected

## Claiming Expenses

Claims for expenses should be submitted to [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) on the [External Examiner Expenses Claim Form](#). Claims should be submitted in line with [approved rates](#) published online and outlined on the first page of the claim form.

## Submission of your annual report

At the end of each academic year of appointment, External Examiners are required to submit a report detailing their views on particular elements of the courses and/or modules which they oversaw. These formal written reports form a key element of the process for maintaining academic standards at the University and provide essential feedback for our departmental teams.

The [External Examiner Report Portal](#) is an online system which will enable you to input your annual report and to view the formal response that your appointing Department has offered to your feedback. It will also provide a means for you to check the details of your appointment online, including your contract start and end dates, and the schedule of courses and/or modules that you will be responsible for.

## Adding your report

When you log into the [Report Portal](#), you will see the following screen:



### External Examiner Report Portal

#### External examiner details

Title	Surname	Other names	Institution	PRID

**No reports yet, select add report and a report type to start**

What action would you like to take?

Select the action **Add Report** from the bottom drop-down menu and click **Next**. You will be taken onto the **Add Report** screen.

You will then be able to select **Add Report** and you will need to complete each area on the screen, choosing from a drop-down list.

What action would you like to take?

What type of report would you like to add? (Complete all boxes \*)

Department \*

Report type \*

Academic year \*

If you are responsible for courses and modules in more than one **Department**, please select the appropriate department for your report. If you are submitting two reports for the same department, please remember to repeat this process twice, selecting the same department for both reports. **Please remember that reports must be submitted one per provision (UG/PGT) and not one per course/module.**

The **Report type** refers to the level of provision you are responsible for (UG – undergraduate, or PGT – postgraduate). Please note that if you are responsible for both undergraduate and postgraduate provision, you will need to input two separate reports.

If you are a PGT External Examiner and wish to submit a report subsequent to an interim exam board, please select **Interim Report** as your report type.

Choose the relevant action from the drop-down list and press the **Next** button.

## Completing your report

Please answer the questions in the report as fully as possible, referring to the [published roles and responsibilities](#).

### Report details

Faculty:

Department:

Action: **ADD REPORT**

### External examiner details

Title	Other names	Surname	PRID	Institution	Status	Academic year	Report type	Report status

Report

Department response

Summary

Schedule

Please comment on both the courses and/or modules you have been appointed to cover, clearly identifying areas that relate to the course(s) or to individual modules as necessary.

Please note that these reports are made available to students in internal University Committees and department meetings. No reference should therefore be made to individual members of staff or students.

#### PART A: Academic Quality and Standards

1. How do the standards of the courses and modules that you examined compare with other UK Higher Education Institutions and national reference points such as the QAA Frameworks for Higher Education Qualifications and professional, statutory and regulatory body requirements (PSRB)? Are you content that UK threshold academic standards are being maintained? Are the rules of assessment for progression and award consistent with sector norms?

NB: The report does continue beyond this point, but it is cropped for display purposes

## Saving your report

You will be able to save your report and return to it at a later point if you are unable to complete it all at once. To use this option click **Save and Exit**.

Click save if you would like to save and return to finish your report at a later date.

Click submit if your report is complete and you wish to submit it for review.

When you next login to the portal, you will be able to see your report and the status of your report.

### External examiner details

Title	Surname	Other names	Institution	PRID

### Reports

Academic year	Report type	Department	Report status	Last updated	Select
2019/20	UNDERGRADUATE		PENDING	22/07/2020	<input type="radio"/>

What action would you like to take?

Add Report  
Update Report  
View Report

To complete the report, choose the **Update Report** option from the drop-down menu at the bottom of the screen. You will then be able to access your report to continue work on it.

**IMPORTANT NOTE: Do not open the Report Portal in multiple tabs in your browser.** When drafting your report, please do not try to open your previous year's report in a separate tab as there is a risk that this can cause system errors when saving your current year's report. If you need to refer to your previous year's report, please ensure that this is accessed/extracted before you begin drafting a new report.

## Submitting your report

Once you have completed your report, please click **Submit completed report**:

Click save if you would like to save and return to finish your report at a later date.

Click submit if your report is complete and you wish to submit it for review.

Save and exit

Submit

You will be prompted to confirm that you have not referred to staff or students by name and once you have checked the box, you will be able to select **Submit completed report**. This will trigger an e-mail to the Quality and Academic Development team. Please note that once submitted, unless there is a query with your report, you will not be able to make any additional changes to it.

Should you NOT wish to confirm this at this stage, pressing the **Exit** button will save the report.

If amendments to your report are required, you will receive an email requesting that you make the appropriate amendment. An example of this could be if a staff or student name/number requires anonymization, or if your department would like more detailed feedback offered to a certain section of the report. Until the amendments are made and the report resubmitted, the Report Status will read **Pending**.

## Viewing your report

You will be able to view your submitted report(s) from this screen by choosing **View Report** from the drop-down menu options.

### External examiner details

Title	Surname	Other names	Institution	PRID

### Reports

Academic year	Report type	Department	Report status	Last updated	Select
2019/20	UNDERGRADUATE		PENDING	22/07/2020	<input type="radio"/>

What action would you like to take?

Next

Add Report  
Update Report  
View Report

Reports will remain on the portal so that in the following academic year, you would be able to view your previous report for reference.

## Departmental response

Departments provide their responses to your comments within the Report Portal and you will receive an automated email notification when this is available to view.

You will need to login to the portal and select the appropriate level (UG – undergraduate, or PGT – postgraduate) and select **View report** and then view the **Department Response** tab.

Title	Other names	Surname	PRID	Institution	Status	Academic year	Report type	Report status
							UG	COMPLETE

Last updated 14/06/2018 17:08 by

Report    **Department response**    Summary    Schedule

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**PART D: Department Response**

A reply should be sent to the External Examiner in response to their report. This should refer to actions taken and explain the reasons where it's been decided no action will be taken. Please add your responses below

## Summary

The report portal allows you to check the **Summary of actions taken on report**. To access this audit trail of activities on your report, click on the **Summary** tab.

Report    Department response    **Summary**    Schedule

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Summary of actions taken on report:

Date	Person	Activity	Decision
14/06/2018 17:08		REPORT CHECK	Decision Report Accepted
01/03/2018 12:17		REPORT SUBMITTED	

This will provide you with a list of actions that have been taken on your report, including:

- the **Date** the action was made
- the **Person** who took the action
- the nature of the **Activity** taken
- any **Decision** or additional **Information** that can be supplied about the action

## Schedule of awards and modules

The schedule of awards and/or modules that you are responsible for can be viewed by clicking on the **Schedule** tab.

This screen will provide the details of your appointment including:

- The level of your provision (Undergraduate; Postgraduate; or both listed separately)
- The start date of your appointment. This date reflects the date that your details were added to our digital records and does not necessarily indicate the date you first carried out External Examiner work for Essex.
- The end date of your term of appointment. This date includes appropriate time following the end of the academic year for submission of your annual report and payment of fees/expenses.
- The details of any contract extensions which have been introduced since the beginning of your appointment
- Details of course and modules you are responsible for, with details of course/module codes and titles, credit weighting, and campus of delivery.

Report	Department response	Summary	Schedule	
<b>Undergraduate</b>				
Contract from 03/10/2019 to 01/09/2023				
Reason for extension: n/a				
Type	Code	Campus	Title	Weighting
Course	UG00339	Colchester	Physiotherapy	
Module	SE108-4-AU	Colchester	Anatomy for Physiotherapy Practice	15
Module	SE109-4-AU	Colchester	Pathophysiology Concepts for Physiotherapy Practice	15



# End of appointment

The month before the end of your appointment, the Quality and Academic Development Team will send you an email informing you that your term of appointment will be shortly coming to an end.

We recommend that you log into HR Organiser and download your payslips for your records (see [Viewing your Payslips](#) for guidance on this process) as these will not be retained in the system past the end date of your contract.

If you need to make changes to your contract, please discuss this further directly with the Department who will advise accordingly and submit a contract change request to QUAD if required. Changes to contracts require approval and this process is managed through the portal, updating all parties throughout.

If you need to end your appointment as an External Examiner earlier than your scheduled contract end date, please contact the QUAD Team at [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) to discuss this process in further detail.

## Useful links and contacts

[Information on the role of External Examiners](#)

[Preparation for the External Examiner role](#)

[Information about report submission](#)

[Information on fee and expenses payments](#)

[Marking Policy for Undergraduate and Taught Postgraduate work](#)

Rules of Assessment ([UG](#) and [PGT](#))

[Assessment policies for UG and PGT awards](#)

For queries about the External Examiner role, University of Essex login and accounts, or IT systems listed in this guidance document, please contact the [Quality and Academic Development](#) team.

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