INTRODUCTION

The External Examiner online nomination portal is a system which will allow Departmental staff to manage their External Examiner nominations and appointments electronically. The portal is an enhancement of iTrent and will be familiar to users experienced with this system; this new system promises to offer more effective ways of centralising External Examiner information and communications across the organisation.

Using the online nomination portal, Departmental staff can now create and complete External Examiner nominations entirely electronically. Comments on each stage of the nomination process from other members of staff are recorded, allowing you to effectively track the progress of your nomination. The nomination portal will additionally allow Departmental staff to electronically manage and update their External Examiners’ award/module allocations and request changes to their contracts.

THE PORTAL

The new External Examiner Portal can be accessed through the University’s iTrent system here. This guidance is designed to provide support whether you are familiar with iTrent as a system or not.

CONTACT & HELP

If you have any questions or require further assistance, you can contact the Quality and Academic Development Team (QUAD) on the details below:

external.examiners@essex.ac.uk  |  01206 87 4861
Helpful Tips and FAQs

KEYBOARD SHORTCUTS AND KEYS

- You can return to the iTrent home page with a right click anywhere on the screen.
- If you have more than one iTrent role, you can switch between them using the drop-down menu in the top right hand corner.
- When entering a date if you want to enter today just press ‘t’ and it defaults to today’s date.

What could an External Examiner need to know?

► Registering as a user:
Your email address will default as your username. Your password must be a minimum length of 8 characters and contain both upper and lower case and at least 1 number.

► Completing the information:
All mandatory fields must be complete before you can submit your information. These usually either indicated through the field highlighted in orange, or noted with a red asterisk. Attachments will be listed on the summary screen. Please set your primary address as your mailing address. This will be the address that any postal communication will be sent to.

► How can I get a copy of the information I have submitted?
Navigate to My information on the left hand menu. Select the nomination you have submitted your information for. Select the send email button to receive a PDF copy to your email address.

► Can I complete some information and return later?
Yes, if you start entering some of your information as long as you press save and home or save and next the information you have completed will be retained. You can then log back in at a later date to complete the rest. To continue go to My information > In progress nominations > Update. You must complete and submit your information by the date indicated.

► How to reset a password?
Choose the forgotten password option. Enter your details and you will be emailed a reset password link.
Who will be using the External Examiner online portals?

External Examiners
External Examiners are part of University quality assurance processes. They provide an impartial view of the course and independent advice to ensure courses meet the academic standards and quality expected across the sector.

The online nomination and report portals will allow External Examiners to: submit their initial application information electronically; easily edit and update their details; check their schedules of awards/modules; submit their yearly reports and expenses claims; and check their University of Essex payslips.

Departmental Managers/Departmental Admin Staff
The Departmental Managers and their delegated administrative teams take responsibility for the initial nominations of External Examiner and managing their duties when in post. Using the online nomination portal, External Examiner nominations can now be fulfilled entirely electronically, with the ability to check which stage a nomination process has reached. Departmental Staff can use the portal to manage and update their External Examiners’ award/module allocations and request changes to their contracts.

Using the online report portal, Departmental staff can receive and store External Examiner reports, and draft Departmental responses, entirely electronically.

Heads of Department
Heads of Department will be able to use the nomination portal to approve or decline External Examiner nominations generated by their Departmental admin team. Nominations will be received electronically and the portal will offer a simple way of storing and accessing the information needed to decide upon the suitability of an appointment.

The report portal offers a straightforward for Heads of Department to monitor External Examiner reports and Departmental responses.

Deputy Deans (Education)
Deputy Deans (Education) will electronically receive External Examiner nominations that have been authorised by a Head of Department. The portal will store the details of the nomination and the nominee, alongside additional comments or supplementary information supplied by the nominating Department.

The report portal allows Deputy Deans (Education) to access, and comment upon, the External Examiner reports and Departmental responses for all Departments in their faculty.

Pro-Vice Chancellor (Education)
The Pro-Vice Chancellor (Education) takes overall responsibility for the External Examiner process. If a nomination is progressed to them, the Pro-Vice Chancellor (Education) can access the portals to check the details of a nomination and approve/reject as appropriate. The Pro-Vice Chancellor (Education) will also have access to all External Examiner reports and Departmental responses stored in the report portal.

Quality and Academic Development
The Quality and Academic Development team will continue to oversee the External Examiners for undergraduate and postgraduate (taught) provision. More information can be found on the [website](#).
# GLOSSARY OF TERMS

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<th>Terminology in iTrent</th>
<th>University of Essex Terminology</th>
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<td>Person completing/ approving change request</td>
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<td>Start Date</td>
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<td>Applicant</td>
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<td>Recruiting Manager</td>
<td>Person starting nomination</td>
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<td>Requisition Administrator</td>
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<td>Lifecycle</td>
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Home Screen

When you first log into iTrent, choose your role. To access the External Examiner Nomination Portal, choose the role **EE – Administrator (Taught) (Your Department)**.

Your Nomination Portal home screen will resemble the below screenshot.

![Home Screen Screenshot](image)

**My to do list (0) / Processes (0)**
This button should be ignored. Administrators who hold other iTrent roles should note that External Examiner actions are not listed as Tasks or Processes and will not appear on your to do list.

**Nominations**
This button will take you through to the **Nominations** screen. From this view you can create and process new External Examiner nominations and check the status of nominations ongoing.

**External Examiners**
This button will allow you to check the details of your current External Examiners and submit requests for contract changes.

There are links to External Examiner guidance and other useful documents in the buttons at the lower edge of the screen. These will be periodically updated and can be referred for updates on External Examiner processes.
Nominations

This section of the guidance details the Nominations view of the Nomination Portal and outlines the processes associated with putting forward a new External Examiner.

Recruitment summary

When you first access on the Nominations view, you will arrive at the Recruitment summary screen. This page gives a summary of all of your ongoing nominations. Completed nominations will disappear from this view roughly one month after they are made a full employee of the University.

Menu – click this icon to display or hide the sidepane, including the search bar for searching for individual nominations.

Requisitions – a nomination is a ‘requisition’ within iTrent’s terminology.

Applicants – when a nominee submits their personal details to the Nomination Portal, they are classed as a ‘applicant’.

Your role – this should always read EE-Administrator (Taught), followed by your Department. Click on the face icon in the corner to change to a different iTrent role or log out.

Name – this will display the name of your nomination and its unique requisition reference. This should always take the form: EE – Name of nominee (REQ#####). Clicking on this name will take you to the Requisition details screen (see page 10).

Applicants – this indicates if the nominee has yet submitted their personal details online. If they have not, this column will read 0; if they have, it will read 1.

Start date – The date that you created this nomination.

Application end date – The date at which the weblink supplied to External Examiners to submit their personal details becomes inactive.
If you click on the **Menu** icon on the top left of the **Recruitment Summary** home screen, you can bring up the sidepane. This is where you can search for all of your External Examiner nominations, including those which have been fully appointed and/or rejected.

**Home or University of Essex ORG** – clicking on either of these will return you to the Nomination Portal home screen (see page 7).

**Search bar** – you can search for a particular nomination here using the full requisition name e.g. EE – [Name of nominee]. Entering only EE as your search term will bring up a full list of your ongoing and historical nominations. You can also search using other search parameters selected from the drop-down menu e.g. by requisition reference.

**Export to Excel** – if you wish to extract any of the information held in this side pane to an Excel Spreadsheet (e.g. your list of ongoing nominations) you can do so by clicking on this icon.

**Expand side pane** – click on this button to expand or contract the side pane.

At the bottom of the **Recruitment Summary** home screen, there are a number of links to different stages of the nomination process. These are arranged into four top level categories (New nomination, Process nomination, View existing nomination, and Useful links) and within each category the links are sequentially numbered to guide administrators through the nomination process. This guidance will take you through the process for creating a nomination stage by stage.
Step 1: Creating a nomination

To begin your nomination, click on **Start new/copy existing nomination**. This will take you to the screen shown below. All of the mandatory field are marked as ‘required’.

- **Requisition name**: You will need to prefix the requisition name with EE and then add the proposed External Examiner’s name: for example EE–JoeBlogs.
- **Requisition reference**: The requisition reference is auto-generated when the nomination form is saved, and will always be ‘REQ’ followed by 5 numbers.
- **Start date**: Ensure that this is always set to today’s date
- **Application closing date**: This controls whether the web link provided to the nominee is live or not, and should be the date you would like the External Examiner to have submitted their details by. This is at the Department’s discretion. If the date in this field is in the past, the nominee will not be able to enter their details online. If you wish to reactivate a web link, simply change this field to a future date.
- **Life cycle**: Ensure ‘EE Lifecycle Taught’ is selected
- **Workflow group**: Select the Deputy Dean (Education) for your faculty.
- **Recruiting manager**: Yourself. Note that you can only see nominations for which you are the recruiting manager for. Please email external.examiners@essex.ac.uk if you need to be made recruiting manager for a nomination that you are not the recruiting manager for.
- **Requisition administrator**: Your Head of Department.
Please ensure you select the requisition category/type. You will need to select either EE Research or EE Taught as this is not a drop-down list.

You will also need to select the **Reason for creation**.

If you are appointing an External Examiner to existing courses and modules and will be replacing an outgoing External with another with a largely similar schedule of awards and modules, please select **Replacement external examiner**. If you are appointing an External to new courses or modules, or there has been a substantial change to how your Department intends to allocate its courses and modules, please select **New external examiner**.

Please enter the first academic year of appointment for the nominee in the **Academic Year Start** text field. All External Examiners are, by default, appointed for four years. If you wish to nominate an External Examiner for a period outside of this default term of office, please add a comment outlining the rationale behind this to the stage notes when progressing the nomination to QUAD. (see page 21)

There is a final text box on the page, **If replacement, who are they replacing?** Please enter the name of the outgoing External Examiner in this field. This is not a mandatory field, but will aid QUAD in monitoring gaps in your Departmental External Examiner allocations.

Once these fields have been completed, click **Save**. This will generate your requisition reference. If you wish to copy the nomination details to create a new nomination (for instance, if your initial nominee withdraws or is rejected) you can now also click **Copy** to duplicate your nomination.
You can expand and contract the menu at the top of the page by clicking on the More/Less icon. You can navigate between different components from this menu, or else return to the Requisition details homepage by clicking on the requisition name (e.g. ‘EE-[Name of nominee]’) at the top of the page.

Click on the requisition name. From the Requisition details screen, click on Enter course/module details to begin adding the relevant courses that have been assigned to the particular External Examiner.

**Step 2: Entering the schedule of awards/modules**

After clicking on this button, you will note that there is an animation to draw your attention to the side pane. This is where you will input the schedule of courses and modules that your nominee will be responsible for. This is illustrated in the below screenshot.
Expand the side pane and click on a row beneath those headed **Master Courses, Modules UG** and **Modules PGT/PGR**.

This will bring up the below screen. If you wish to return to the main summary page at any point, click **Save** and the requisition name at the top of the screen.

Enter the Master Courses and modules one-by-one using the following method:

- Select the course/module from the relevant drop-down list.
- Click **Save**.
- Click **New**.
- Repeat until the schedule is fully populated.

Courses and modules are displayed in the following format.

**CE UG CE310 CA Evolutionary Computation and Genetic Programming**

**Campus code** – modules with multiple campus codes (e.g. Southend SO and Colchester CO) coded modules can be added to External Examiners' schedule’s

**Module code** – selecting a module code to be assigned to an External will assign all module variants within the same type of provision, excepting those taught at different campuses.

**Department code** – you will only be able to see courses/modules coded to your own Department. If you nominate will be responsible for courses/modules coded to another Department, please email [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) for further guidance.
Step 3: Uploading supporting documents

In some instances, you may wish to upload additional documents in support of the nomination. To do this, click on the button **Upload supporting documentation (where applicable)**.

From this screen, you will need to select the document type from the drop-down menu (EE-Nomination Supporting Documents) and then browse to upload the document from your computer. When you have uploaded your document, click **Save**.

**TO NOTE:**
This section is for additional documentation only; this does not refer to the External Examiner's CV or Right to Work documentation. These documents are uploaded in a separate section.
Step 4: Providing Portal access for the nominee

Once the nomination details have been entered, the nominee will need to be asked to submit their personal details to the Portal via a unique online web link. In order to supply the nominee with this web link, click on the **Make nomination live and generate web link** button.

You will then be taken to the below screen.

Select the taught option for both the internal and application forms and make sure that the EE-Taught field is highlighted in the Web Views section.
Scroll to the bottom of the page and select your Department from the drop-down list.

In order to generate the web link, tick the Publish check box and click Save.

Job information

Publish  
Job title  EE-Application Test  
Region  

Once you have saved this step, you will be emailed an automatically generated web link from the system that you will need to forward on to the proposed External Examiner.

TO NOTE:
When you e-mail the web link to the prospective External Examiner, you should include a copy of the guidance document for new appointees. This is held on the Academic Quality and Standards website here. 
The External Examiner will be able to use the link to access the nomination and will see the screen as below:

The External Examiner will need to click **Submit** and either follow the **New user registration** process or log-in with a previously created user name and password.
The prospective External Examiner will need to fill out their personal details using the online form. If you wish to check the details of this form it can be viewed in the External Examiner New User Registration guidance here.

**Step 5: Checking the nominee’s details**

When the External Examiner has completed their details and submitted the online form, you will receive an email notification confirming submission.
Once the External Examiner has completed their details, you will be able to check the information they have provided, including what previous experience they have had as an External Examiner, any other roles they may currently be undertaking, and assess whether there are any potential conflicts of interest.

From the Recruitment Summary screen, click the **Check CV/Right to Work** button. This will bring up the documents provided by the nominee on the side pane. You can download these and check them to confirm the nominee is suitable for appointment.

CVs should be checked against our criteria for the nomination of External Examiners here: [https://www1.essex.ac.uk/quality/external_examiners/criteria_for_nomination.asp](https://www1.essex.ac.uk/quality/external_examiners/criteria_for_nomination.asp)

Right to Work documents should be a document confirming Right to Work (usually a UK/EEA passport) in line with the Immigration, Asylum and Nationality Act 2006 (Prevention of Illegal Working regulations)

- which has been verified by their home institution or employer
- dated by the home institution
- Stamped with departmental or institutional stamp

Please note, if this is not available, a document from List A or List B of the Home Office Right to Work checklist\(^1\) is acceptable. If the External Examiner is a non UK/EEA national and/or cannot supply any of the required documentation, please seek advice from QUAD via external.examiners@essex.ac.uk.

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When submitting their personal details online, the nominee will be asked to confirm a few details for assessing their suitability for appointment. To check these details, click on the **Add/amend suitability information** button. This will take you to the below screen.

This information should be checked and any potential issues or conflicts of interest should be highlighted to QUAD as part of the nomination process. If there are exceptional circumstances that mean that your Department wishes to appoint an individual who does not fit with the criteria for appointment, an additional rationale for appointment should be provided as a supporting document (see page 14) or as a stage note, as outlined in the following section.
Step 6: Processing the nomination to the Head of Department

3. Move to HoD for checking

When the details provided by the nominee have been checked and you are ready to progress the nomination, you can move it to your Head of Department for their approval. Click on the Move to HoD for checking button to see the below screen.

- Select the current stage (1a: Nomination) from the first drop down menu.
- Select the stage you will move it to (2a: Awaiting HoD check) from the second drop down menu.
- Enter any comments you would like to make on the nomination to the Stage notes text box. Please note that any comments entered can be seen by other colleagues involved in the External Examiner nomination and approval process, i.e. QUAD Team and Deputy Dean (Education).

Ensure you tick the box next to the External Examiner’s name and click Save. This will trigger an automated email to the Head of Department advising them they now need to review the submission for approval, amendment or rejection.
Step 7: Checking the details/progress of an existing nomination

To check the progress and status of an existing nomination, click on the View existing nomination button on the Recruitment summary home page.

01. View/amend nomination

Click on View/amend nomination to access the main nomination details, as illustrated on page 10.

02. View supporting documentation

Click on View supporting documentation to access any documents attached to your nomination.

03. Check nomination status

Click on Check nomination status to access the nomination’s Requisition campaign summary, as illustrated below. This page provides a summary of your nomination. By expanding the Applications section, you can download the nominee’s application form. This form contains the personal details that the nominee has provided when applying for the position.
04. Authorisation history and comments

The authorisation history, and any comments from other portal users, can be accessed from the **Authorisation history and comments** button.

Details can all be found on the left hand side of the screen. This will show the date the nomination was moved to that stage and any comments which have been added by the HoD, QUAD or the Dean.

Step 8: Nomination Outcome

There are several potential outcomes once the nomination has received initial approval by the Head of Department and is forwarded on to the QUAD Team.

- **Request for more information**
  A colleague in QUAD may send the nomination back to the Department to request more information. In this instance, an automated email will be sent to the nominated Departmental colleague for External Examiner nominations – usually the Department Manager.

- **Approved**
  Nomination has received approval by the Deputy Dean (Education). You will receive an automated email confirming this.

- **Rejection**
  If the nomination is unsuccessful, QUAD will receive an automated email following the Deputy Dean (Education)'s decision. QUAD will then send a personalised email to the Department providing further information as to why the nomination was rejected.
Next steps…

Once the nomination has been approved by the Deputy Dean (Education) or Pro-Vice Chancellor (Education), QUAD will receive automated notification by email. QUAD will then create an appointment letter from the portal to send to the External Examiner.

The External Examiner will need to sign the acceptance form and return to QUAD via the External Examiner email account. QUAD will upload this form onto the External Examiner’s iTrent account and payroll will also receive notification. QUAD will inform the Department that the External Examiner is now officially in post.

Once Payroll made an External Examiner a full employee, their University of Essex email credentials will be created and QUAD will email the External with instructions on how to activate their account.

Following confirmation of appointment, there are a number of documents that the Department will need to send to a new External Examiner. For a full list of the information which an External Examiner will need to be supplied with, and with whom the responsibility sits, please visit the External Examiner section of the QUAD website.
Step 9: Providing IT access to an External Examiner

- When data is entered on iTrent, a login is generated and a newly generated personal identifier (PRID) is written back to iTrent.

- QUAD will email the External Examiner to advise them of their PRID.

- The External Examiner will need to visit the website to [Register an external email address and passphrase](#) with the University of Essex.

- The External Examiner will then receive an automated email which contains a link which they click on to activate their external email address.

- Having activated their external address they revisit the site above to [Obtain your University login and password via previously registered email address and passphrase](#) – the site will then designate them an Essex login and initial password.

- They will need to store these details; they will be needed each time that they log in.

- The log in details will automatically enable access to FASER and Moodle platforms, however, access to other platforms or online resources, such as SharePoint, will need to be organised by the Department as and when required.
View Existing External Examiners Details

To check the details for your existing External Examiners, return to the homepage by clicking on the **Home** icon in the top left hand corner of the screen.

From the homepage, click on **External Examiners**. This will bring up a search bar on the left hand side of the screen. As your nomination/requisition has now been made a full employee, you can now search for a certain External Examiner by their forename or surname, rather than by their requisition name or reference.
This screen will show an occupancy end date for when the contract of an existing External Examiner is scheduled to end. Please note the standard appointment period for External Examiners for taught provision is four academic years, although in certain circumstances this period may be shorter.
This screen shows the External Examiner’s University of Essex and external email addresses. **Changes to External Examiner contact details should be emailed to external.examiners@essex.ac.uk.**

<table>
<thead>
<tr>
<th>Means of contact</th>
<th>Contact at</th>
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<tbody>
<tr>
<td>E-mail address (personal)</td>
<td></td>
</tr>
<tr>
<td>UoE E-mail address (automatic)</td>
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<tr>
<td>User e-mail address</td>
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To check whether an External Examiner has received their fee payment for the year, click on the **Fee payments** tab. This will bring up a history of all the fee payments made to, or pending for, an External Examiner.

![Fee payments tab](image)

Submit an External Examiner contract change

In some instances, changes may be required to an External Examiner’s contract, such as to change the number of modules, or amend a contract end date. Click on the **Contract Changes** button to access the options for making contract changes.

To initiate the contract change process, click **Add new contract change form**.
On the following screen, you will need to select the **Performance review template** from the drop-down menu. Ensure **EE-Contract change** is selected.

Next, click on the search icon next to the **Performance reviewer** drop-down. Search for your own name and make yourself the performance reviewer. Do not select the External Examiner from the drop-down menu.

**TO NOTE:** The term ‘performance reviewer’ is a pre-existing option in iTrent and is unavailable to update in the External Examiner nomination portal. The term does not refer to the performance of the External Examiner. Please refer to the [Glossary](#) for more terminology restricted within iTrent at current.

Click **Save**.
The next stage is to enter the specific details of the change that you are requesting. Click on **Enter details of contract change** to access the below screen.

Select **External Examiner contract details** from the drop-down menu and click **Start**.
You will be taken to the **Performance review form**. This page provides a summary of the term of appointment for the External Examiner.

This form asks for the following information. You should only fill out the sections that are relevant to your proposed contract change. All other fields should be left blank.

**Changes to awards/modules**
- Details of any modules to be added for the External Examiner?
- Details of any modules to be removed for the External Examiner?
- Details of any changes to the External Examiner’s awards.
- Does this change effect the External Examiner’s agreed fee?

**TO NOTE:** The External Examiner fee structure can be accessed on the [Academic Standards and Quality webpages](#).

**Changes to period of appointment**
- Do you wish to extend the current contracted period?
- Do you wish to end the current contract period early?
- Rationale for contract date change?
- New contract end date
- Please detail below any other changes to the external examiner contract not covered above.
- Has the External Examiner agreed to the proposed changes?

**TO NOTE:** This final field is mandatory and must be answered before the form can be submitted.
When you have completed the details of your proposed contract change, scroll to the bottom of the form and click **Save**. Click **Summary** to return to the previous page.

QUAD will receive a notification that a contract change has been submitted whenever you hit **Save**. Your proposed contract changes will be reviewed by QUAD who will process it as appropriate to the request, seeking Deputy Dean (Education) approval if relevant. You will be notified via email of the outcome of the request and QUAD will provide the External Examiner with formal confirmation of the change to their contract.
Useful Links

► Criteria for nomination
https://www1.essex.ac.uk/quality/external_examiners/criteria_for_nomination.asp

► Nomination portal user guide
https://www1.essex.ac.uk/quality/external_examiners/default.asp

► Email QUAD
external.examiners@essex.ac.uk

► General External Examiner Information
www.essex.ac.uk/quality/external_examiners/default.asp

Additional useful links are provided within the main tab of the portal:

Document review information

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<th>Quality and Academic Development</th>
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<tr>
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<td>Chelsey Smith, Luke Nash, Sarah Smith</td>
</tr>
<tr>
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