External Examiner Nomination Portal (Taught)

Department Administrator User Guide

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Introduction

The [External Examiners Nomination Portal](#) is a system for managing External Examiner nominations. A Head of Department will be able to supervise and monitor their Department's External Examiner nominations and appointments through the system, with the help of this guidance.

The Nomination Portal is an enhancement of the University's HR management system, iTrent. Elements of the Nomination Portal will be familiar to users who have previously used this system, whilst some elements are specific to taught External Examiner nominations.

Departments can request new users are provided access to the Nomination Portal by contacting external.examiners@essex.ac.uk.

Criteria for External Examiner appointment

Decisions around the approval or rejection of taught External Examiner nominations should be made in conjunction with the [criteria for appointment](#) published online. Departments should ensure that the nomination includes appropriate evidence that the proposed External Examiner meets all the criteria for selection. Where these criteria are not fully met, a written case for an exception should be submitted with the nomination.

As an institution the University should aim to have a suitably diverse External Examiner pool such that it reflects the richness and diversity of the higher education sector. Departments/schools are encouraged to review their appointment and recruitment strategies to ensure that this is reflected in the External Examiners they appoint. These External Examiners in turn will contribute to the inclusiveness of the University's teaching, learning and assessment processes.

Contact and help

If you have any questions or require further assistance, you can contact the Quality and Academic Development Team (QUAD) via email external.examiners@essex.ac.uk or via telephone (01206 87 3944).

Keyboard shortcuts

- 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.

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.
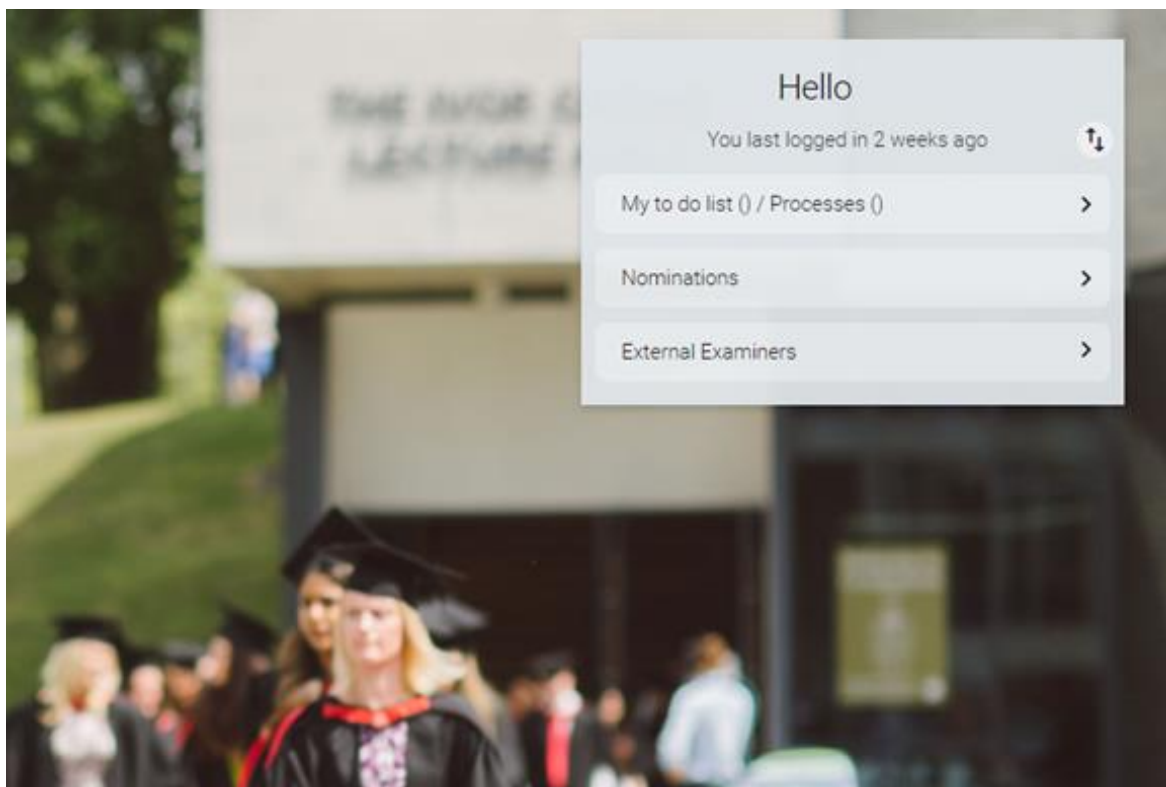
My to do list (0) / Processes (0)

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.

Requisitions – a nomination is a 'requisition' within iTrent's terminology.

When a nominee submits their personal details to the Nomination Portal, they are classed as an 'applicant'.

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

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**.

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

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

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.

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.

LINKS

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

New nomination

01. Start new/copy existing 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 Faculty Dean for your faculty, at the correct level of provision for your nomination. If your nomination is for a dual provision UG/PGT appointment, choose the level with the most awards and/or modules associated.

- **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 16)

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.
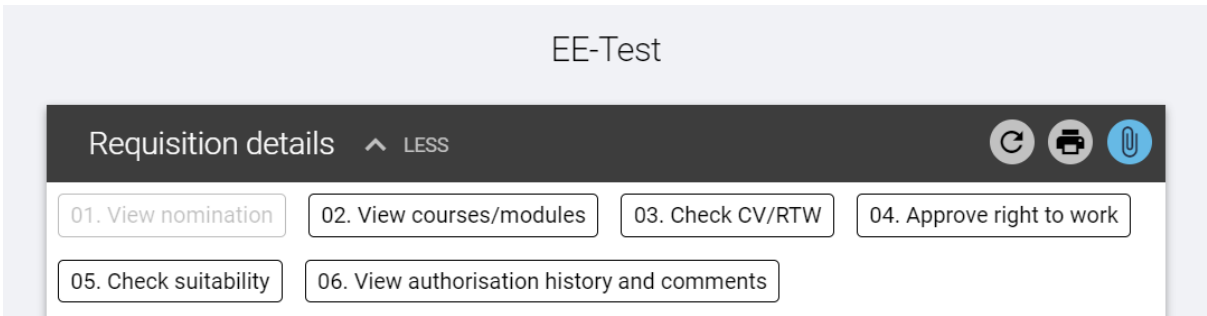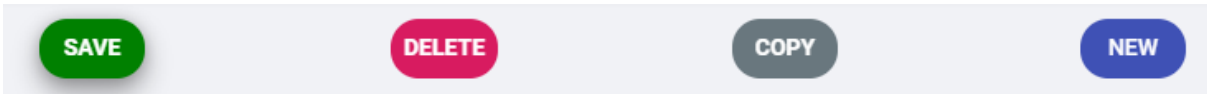
You can expand and contract the menu at the top of the page by clicking on the **More**/**Less** icon. You can navigate between different components from this menu, or else return to the **Requisition details** homepage by clicking on the requisition name (e.g. 'EE - [Name of nominee]') at the top of 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

02. Enter course/module details

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.
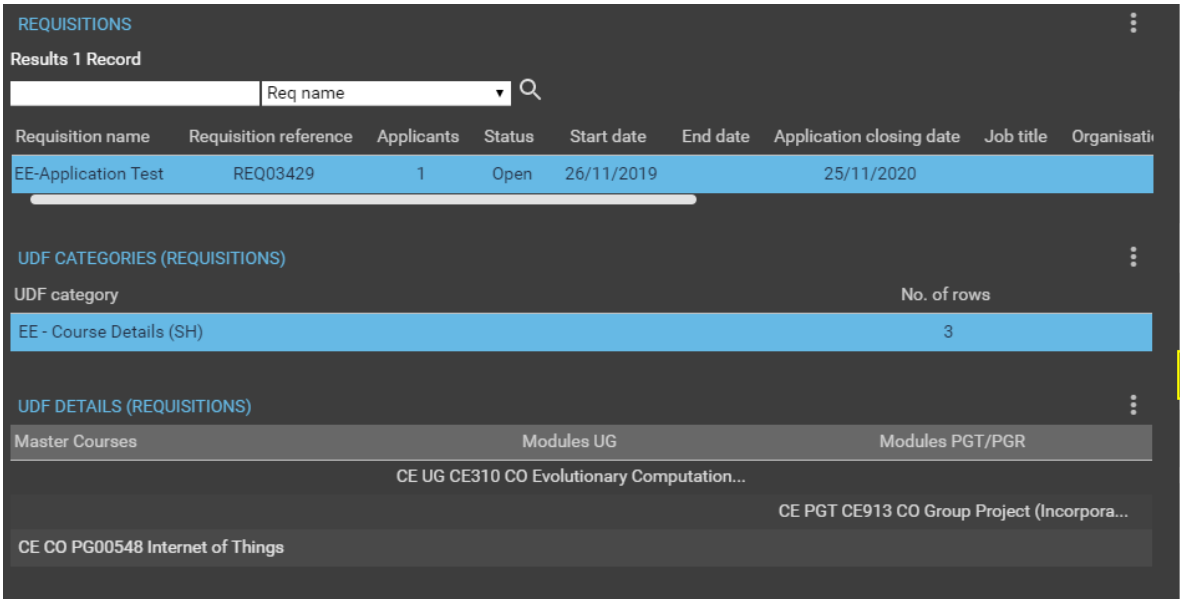
Expand the side pane and click on a row beneath those headed **Master Courses**, **Modules UG** and **Modules PGT/PGR**.

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.
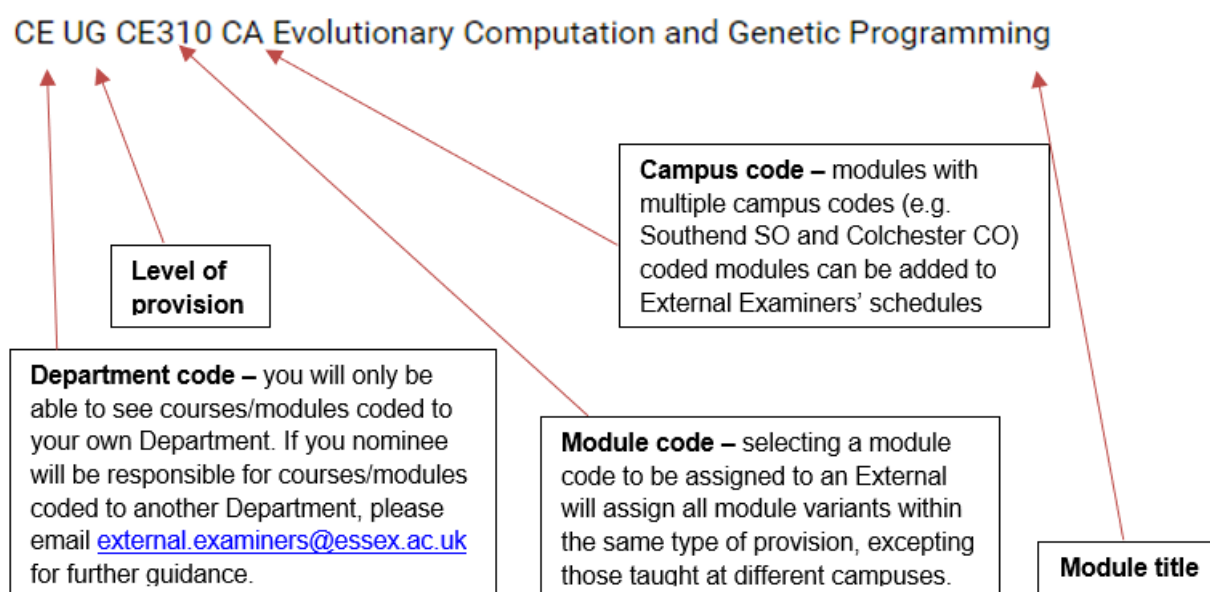
NB: Master courses only need to be added once. There is no necessity to link every module you add to a nominee's schedule to a master course code, or to duplicate courses on the schedule.

Step 3: Uploading supporting documents

03. Upload supporting documentation (where applicable)

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 access to web application form 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.

04. Make nomination live and generate web link

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**.


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. This guidance provides a run through of the online application process, which is broadly similar to the process for applying to a standard University of Essex job vacancy. Issues and questions arising from the application process can be directed to external.examiners@essex.ac.uk

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.
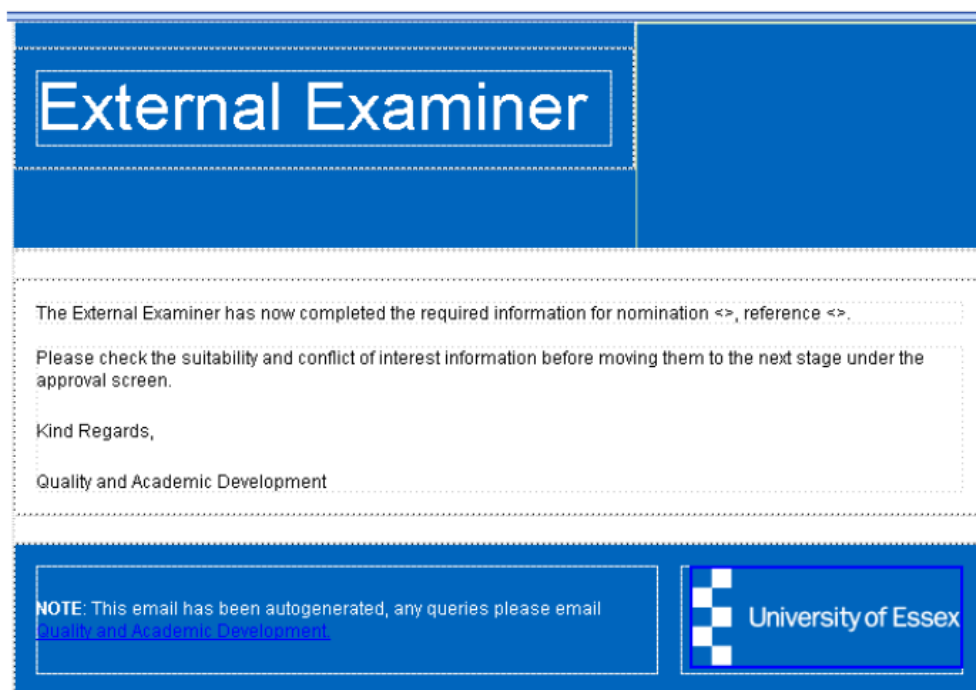
Once the External Examiner has completed their details, you will be able to check the CV and other information they have provided against the University's criteria for appointment of External Examiners, including what previous experience they have had as an External Examiner, any other roles they may 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.

Requirements for Right to Work documents are different depending on the individual's documentation and immigration status. Right to Work documentation is checked by the Quality and Academic Development team. In almost all instances of External Examiner appointments a member of Quality and Academic Development team will meet a new appointee via Zoom before issuing appointment documentation in order to fulfil the legal requirements for Right to Work checking.

External Examiners should not undertake any work until their Right to Work has been verified and contract issued, otherwise the University will not be fulfilling its responsibilities in respect of employment law.

The process for Right to Work checking can be time consuming depending on the types of documentation required for verification and the availability of the new appointee for completing the checks. QUAD aim to complete these checks within 2-3 weeks of receiving the nominations, but Departments should factor the possibility of these checks taking longer under certain circumstances.

Departments can help expedite this legally mandated process by ensuring new applicants are aware of the process and reinforcing communications around the importance of fulfilling these checks in a timely fashion. More detailed guidance on what is required for External Examiners with differing Right to Work statuses is provided in the section 'Proof of Right to Work' in the External Examiner New User Registration Guidance.

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 10) 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.

EE-Application Test

Requisition processing (as of 10/03/2020) EE-Application Test ∨ MENU

Update information

Stage selection (required) ▼

- 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 Faculty Dean.

Ensure you tick the box next to the External Examiner's name and click <u>Save</u>. 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.

Click on **View/amend nomination** to access the main nomination details, as illustrated on page 3.

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.

EE-Application Test

Requisition campaign summary EE-Application Test ∨ MENU	
Requisition name	EE-Application Test (REQ03429)
Job title	EE-Application Test
Requisition start date	26/11/2019
Application closing date	25/11/2020
Published	Yes

Document attachments

test.docx ⬇

+ Applications

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.

∧ APPLICANTS					⋮
Select all					
Name	Applicant reference	Stage	Stage date	Application date	Active/Dormant
██████████	APP15074	EE Stage 99: Reject/ Withdraw	15/04/2019	27/02/2019	Active

∧ APPLICATION STAGE HISTORY				⋮
Stage	Date	Notes	People resources	
EE Stage 99: Reject/ Withdraw	15/04/2019	In my judgement, the proximity is too clos...		
EE Stage 3a: HoD supports/ QUAD review i...	28/03/2019			
EE Stage 2a: Awaiting HoD check	26/03/2019			
Stage 1a: Web applicant	27/02/2019			

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 Faculty Dean. You will receive an automated email confirming this.

- **Rejection**

    If the nomination is unsuccessful, QUAD will receive an automated email following the Faculty Dean'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 Faculty Dean or Pro-Vice Chancellor (Education), QUAD will receive an 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. QUAD will upload this form onto the External Examiner's iTrent account and People & Culture (Reward) will also receive notification. QUAD will inform the Department that the External Examiner is now officially in post.

Once Reward have 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 preparation for the External Examiner role webpage.
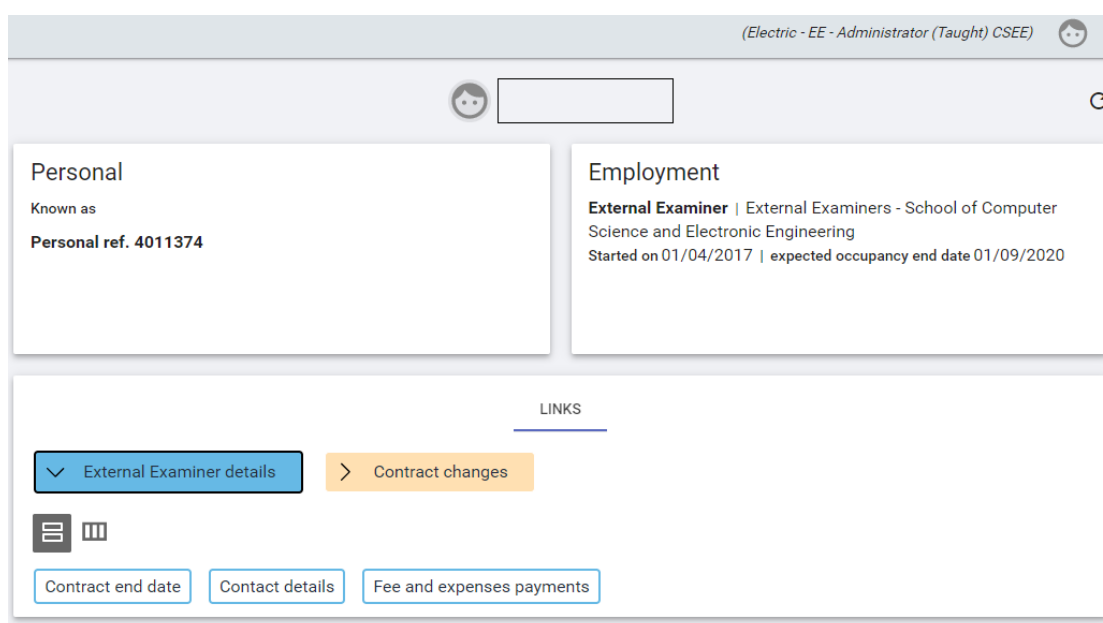
View Existing External Examiners Details

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.
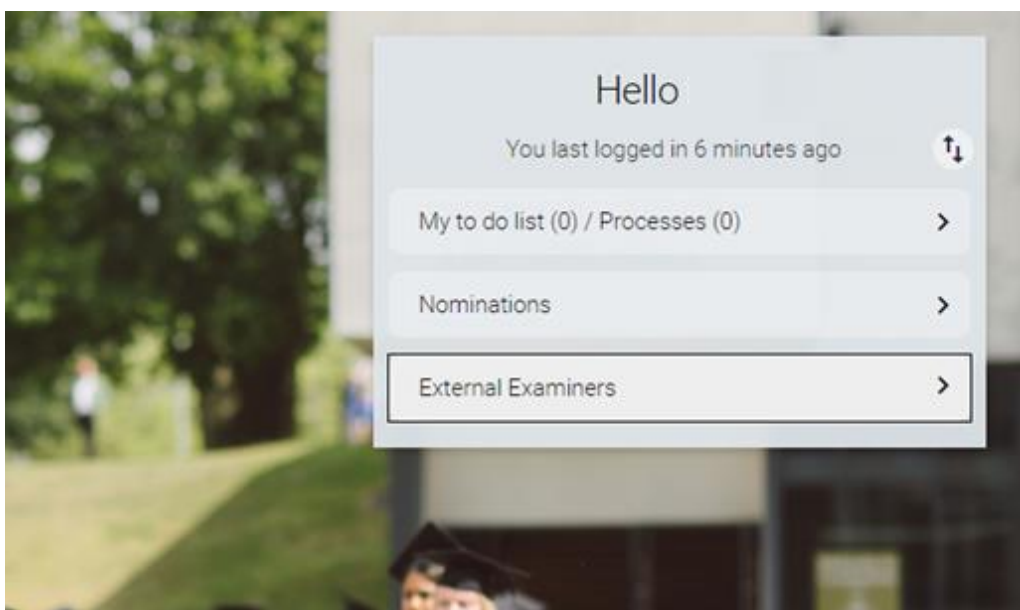
From the homepage, click on **External Examiners**. This will bring up a search bar on the left-hand side of the screen. As your nomination/requisition has now been made a full employee, you can now search for a certain External Examiner by their forename or surname, rather than by their requisition name or reference.

External Examiner details

Contract end date

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.

Occupancy details (as of 10/03/2020) External Examiner (Temp-Occupied)
∧ LESS

| Contract end date | Contact details | Fee and expenses payments |

Current status Live
Occupant
Occupancy start 01/04/2017
Occupancy end
Occupancy type Standard ▾
Expected occupancy end date 01/09/2020 📅
Expected occupancy end reason ▾

Contact details

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.**

CONTACTS

Means of contact	Contact at
E-mail address (personal)	
UoE E-mail address (automatic)	
User e-mail address	-

To check whether an External Examiner has received their fee payment for the year, click on the **Fee and expenses payments** tab. This will bring up a history of all the payments made to, or pending for, an External Examiner.
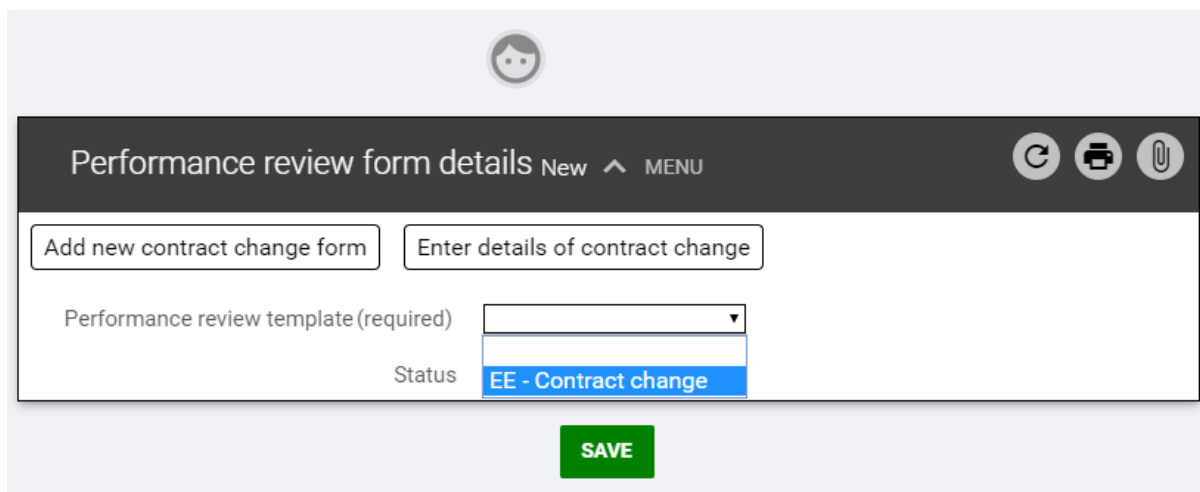

Submit an External Examiner contract change

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.
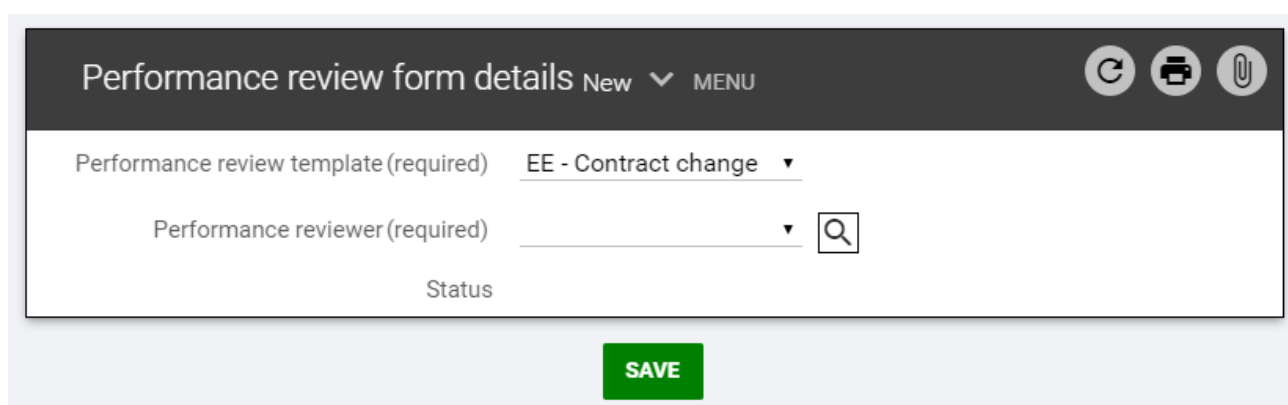
To initiate the contract change process, click **Add new contract change form**.

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**.

Enter details of contract change

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

You will need to enter the details of the contract change and select **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.
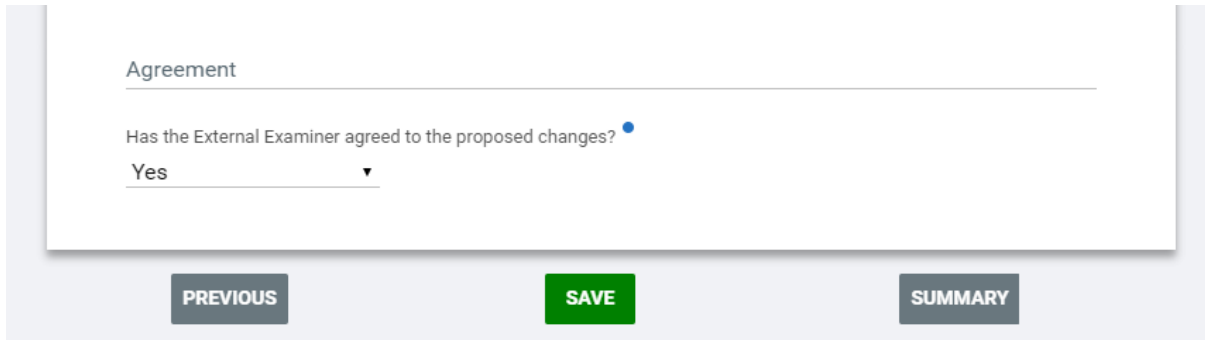
Changes to period of appointment

- 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 is as appropriate to the request, seeking Faculty Dean 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](#)

► [External Examiner nomination guidance](#)

► [Email QUAD](#)

► [External Examiner roles and responsibilities](#)

► [Preparation for the External Examiner role](#)

► [External Examiner expenses claim form](#)

► [ESIS report: all current programmes with associated External Examiners (including unallocated programmes)](#)

► [ESIS report: all current modules with associated External Examiners (including unallocated modules)](#)

► [ESIS report: schedules of all current External Examiners by department](#)

► [External Examiner Report Portal](#) and [guidance](#)

Additional useful links are provided within the main tab of the Nomination Portal:

> New nomination   > Process nomination   > View existing nomination   ⌄ Useful links

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✉ Email QUAD   ↗ User guide/nomination criteria
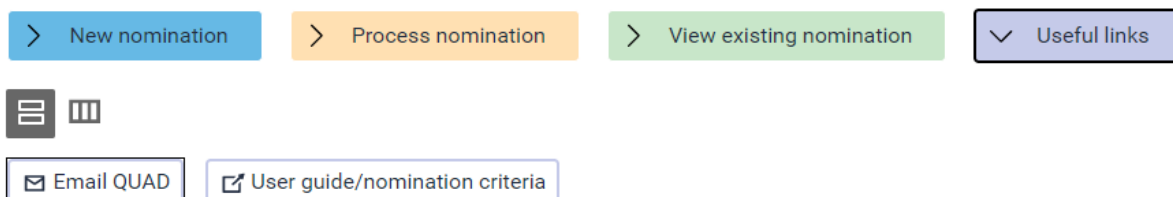
Document review information	
Document Owner	Quality and Academic Development
Document Author	Quality and Academic Development
Document last reviewed by	Quality Officer – Luke Nash
Date last reviewed by	02/08/2024
Review frequency	Annually