University of Essex

External Examiner Nomination Portal (Taught)

Head of Department User Guide

Authors: Quality and Academic Development
Publication date: August 2023
Review date: August 2024

Table of Contents

Introduction **1**

Criteria for External Examiner appointment 1

Contact and help 1

Keyboard shortcuts 1

Home screen **2**

Nominations **3**

Recruitment summary 3

Checking a new nomination **4**

View nominated courses **5**

Checking a nominee's CV **6**

Checking a nominated External Examiner's suitability **7**

Move to requisition processing or reject nomination **8**

Nomination outcome **9**

Next steps **10**

Useful links **11**

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.

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.

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).

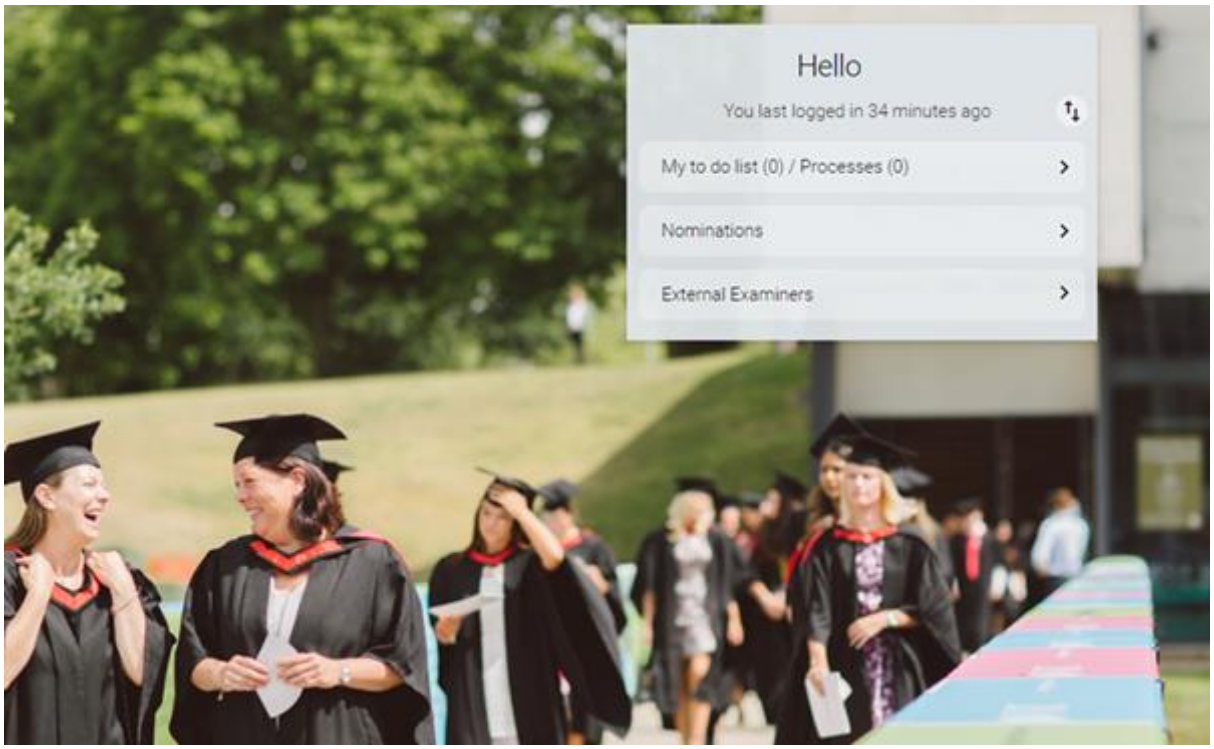
Keyboard shortcuts

- 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 – Head of Department** *(Your Department).*

Your Nomination Portal home screen will resemble the below screenshot.



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

<u>This button should be ignored.</u> Users 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 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.

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

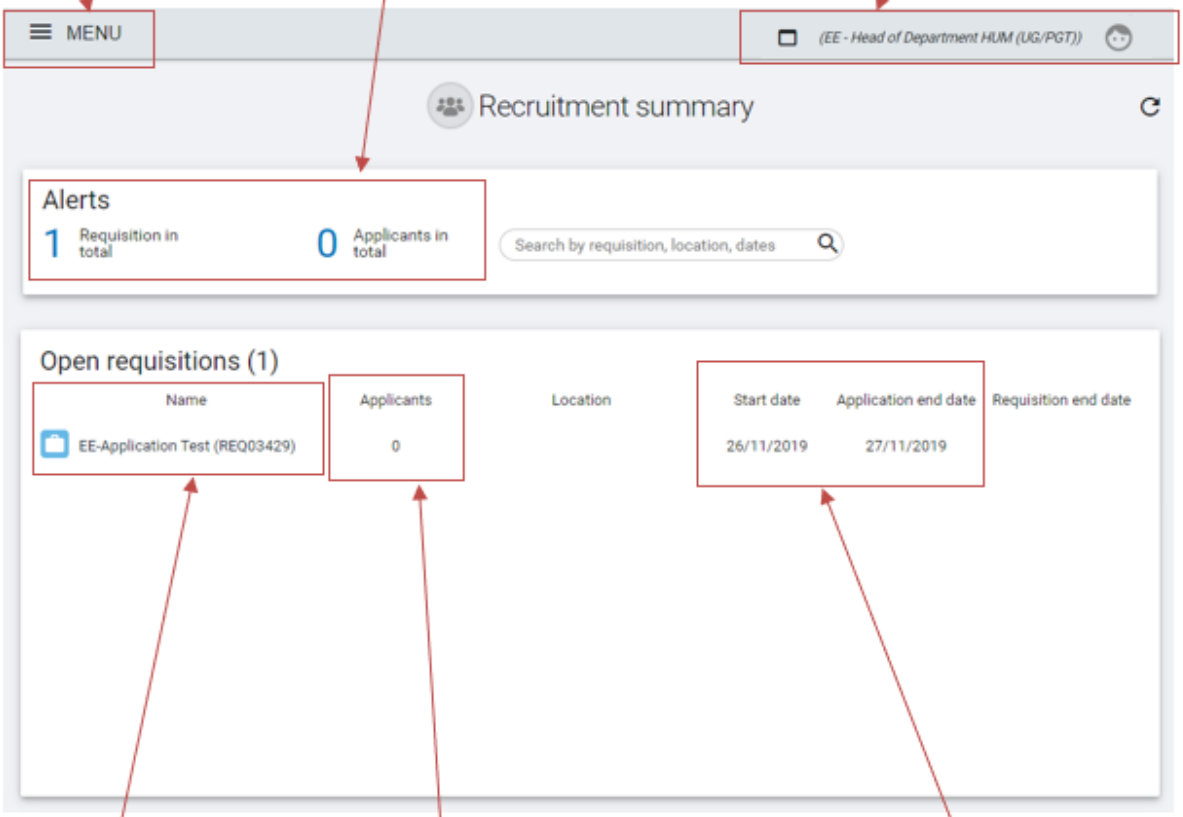
When you first access on the **Nominations** view, you will arrive at the **Recruitment summary** screen. This page gives a summary of all of the nominations awaiting your approval.

Menu – click this icon to display or hide the sidepane, including the search bar 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 an 'applicant'.

Your role – this should always read EE-Head of Department, 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**.

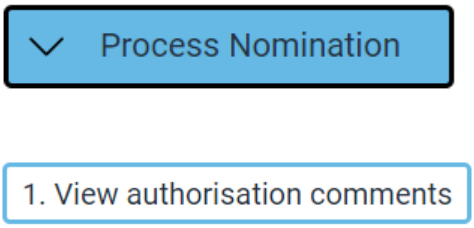
Start date – The date that this nomination was created.

Application end date – The date at which the weblink supplied to External Examiners to submit their personal details becomes inactive.

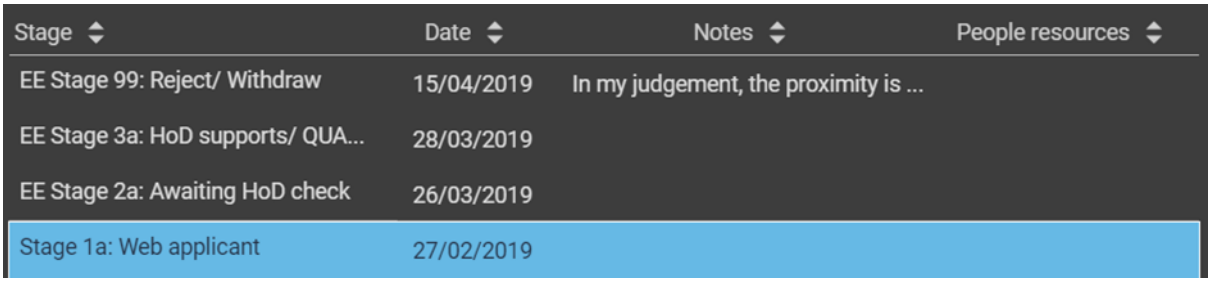
Name – this will display the name of a nomination and its unique requisition reference. This should always take the form: EE – *Name of nominee* (REQ#####).

Checking a new nomination

Once a new External Examiner nomination has been made, it will require review to determine whether it may be approved, more information requested, or rejected. All External Examiner nominations should be considered in conjunction with the University's published criteria for appointment. You will receive an automated e-mail to prompt you each time a nomination needs to be reviewed.



To check any comments that other users in the nomination/approval process have made on this nomination, you will need to click on the nomination name from the Recruitment summary home page and **View authorisation comments**.



Stage	Date	Notes	People resources
EE Stage 99: Reject/ Withdraw	15/04/2019	In my judgement, the proximity is ...	
EE Stage 3a: HoD supports/ QUA...	28/03/2019		
EE Stage 2a: Awaiting HoD check	26/03/2019		
Stage 1a: Web applicant	27/02/2019		

This will show you all the stages which the nomination has progressed through, as well as any comments which have been recorded from each stage.

If a nomination is rejected, the rationale for the rejection will be recorded in this section of the Portal.

View nominated courses

2. View courses/modules

Return to the **Recruitment summary** screen. Click **View courses/modules**. This will bring up the below menu in the side bar.

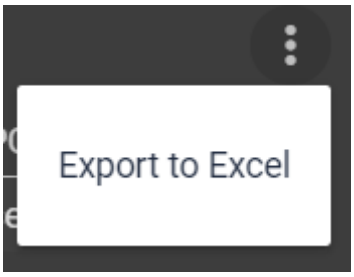
UDF category	No. of rows
EE - Course Details (Hum)	0
EE - Course Details (Partner)	0
EE - Course Details (SH)	0
EE - Course Details (SS)	6

Click on your Faculty to view a list of the proposed courses/modules to be assigned to the External Examiner.

UDF DETAILS (REQUISITIONS)

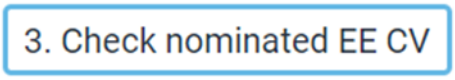
Master Courses	Modules UG	Modules PGT/PGR
		BE PGT BE985 CO Research Portfolio
		BE PGT BE467 CO Managing for Ethics an...
BE CO PG00670 Management		
		BE PGT BE488 CO Operations and Supply ...
BE CO PG00430 Management and Organi...		
		BE PGT BE485 CO Management and Strat...

Click the below icon to export the list of courses/modules to MS Excel.

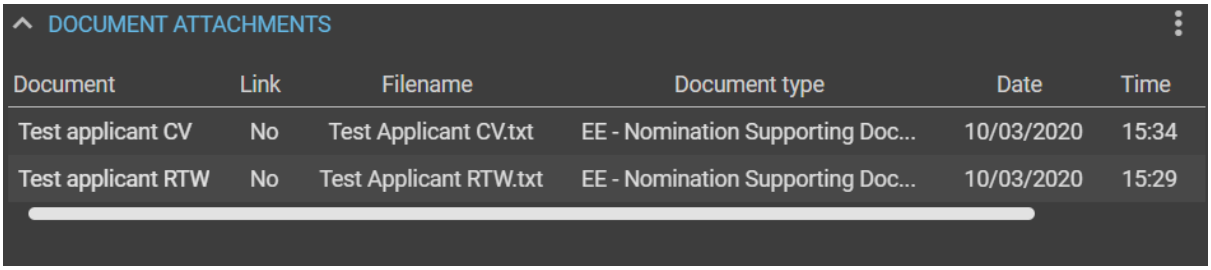


Checking a nominee's CV

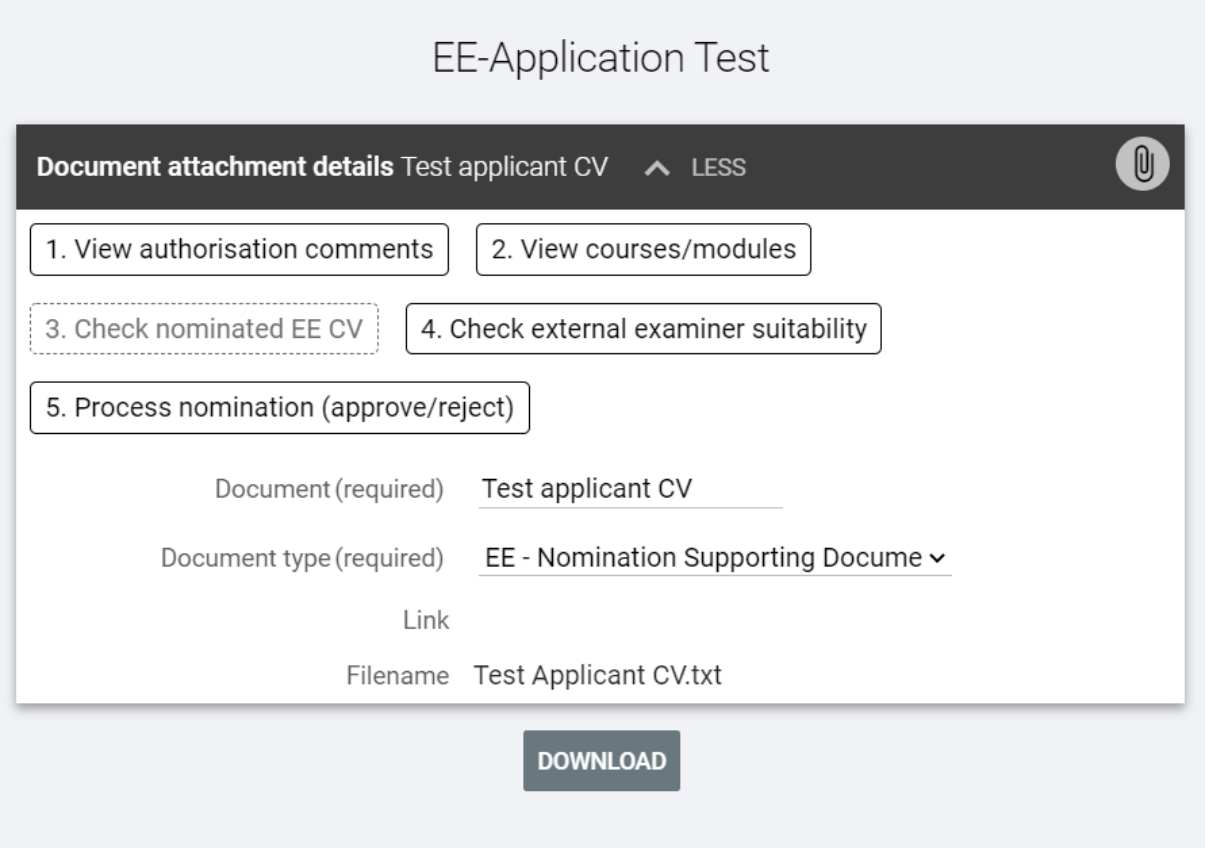
As part of the approval process, the CV, Right to Work documents, and any other information uploaded as part of the nomination must be reviewed. To view the External Examiner's CV, click the following button:



A list of the attachments associated with the nomination will then be available for access in the side bar. Click on the document name.



This will bring up the below screen. Click **Download** to access the document attachment.



Click on the nomination name at the top of the screen to return to the **Requisition details** screen.

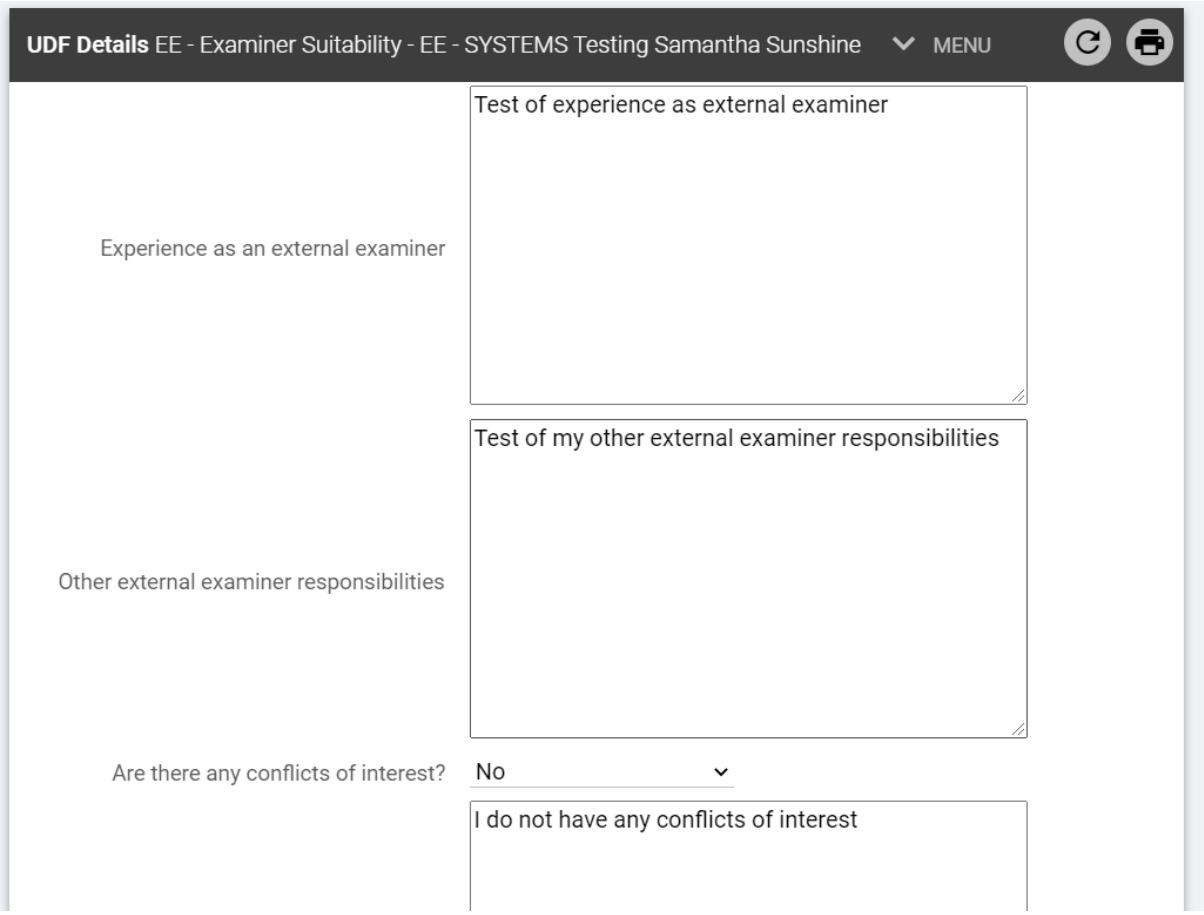
Checking a nominated External Examiner's suitability

To review information provided by the nominee themselves to support their eligibility to carry out the External Examiner role click the below button.

4. Check external examiner suitability

On the side bar menu, click the category **EE – Examiner Suitability**. This will take you to the following screen, where you can check information provided on the following criteria for appointment.

- **Experience as an External Examiner**
- **Other External Examiner responsibilities**
- **Details of any potential conflicts of interest**

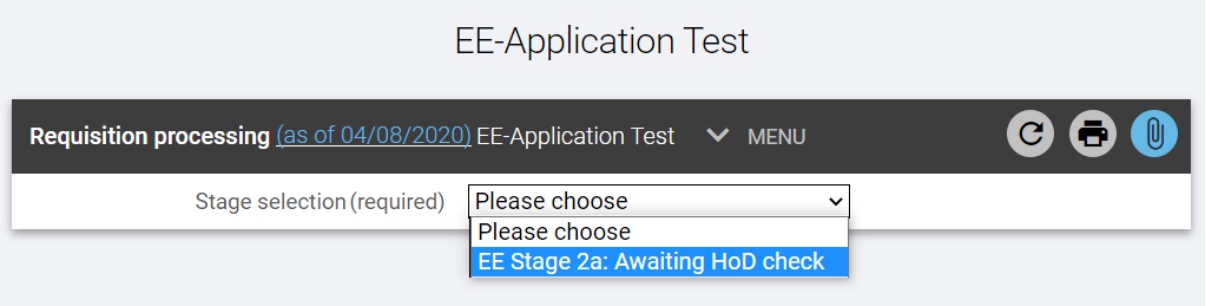


Move to requisition processing or reject nomination

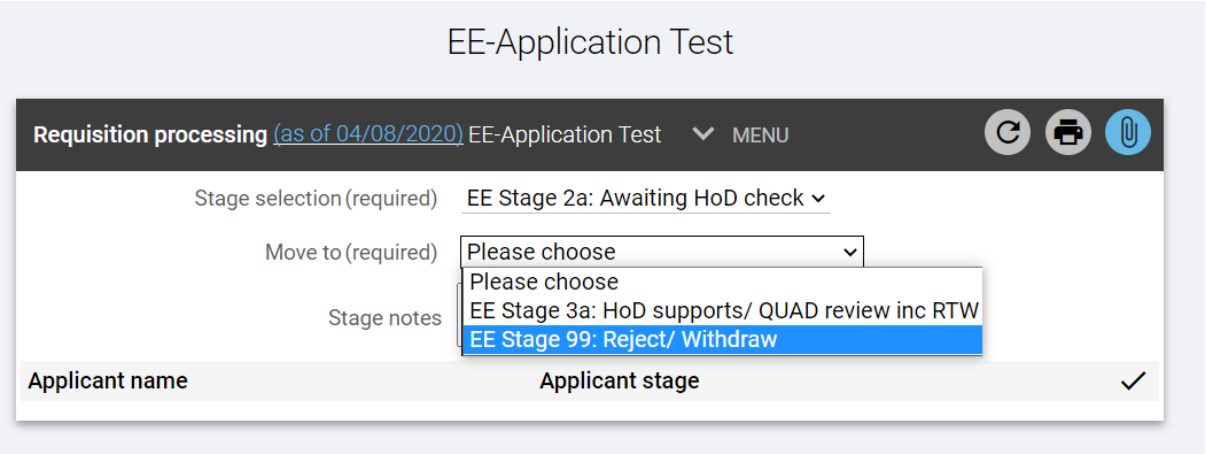
When you have reviewed the details of your nomination, you can either approve it for progression to QUAD and the Faculty Dean or reject it. To register your decision, please click the below button.

5. Process nomination (approve/reject)

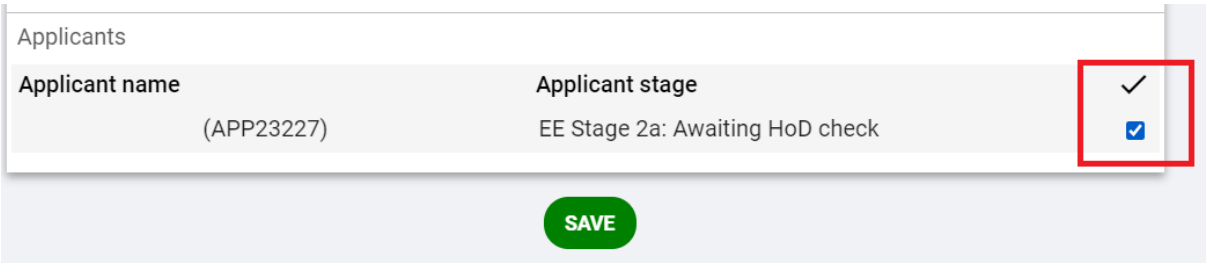
This will bring up the below screen. Chose **EE Stage 2a: Awaiting HoD check** from the drop-down menu.



When you have selected this option, you will be provided with a second drop-down menu. This is where your decision of whether to approve or reject is registered. From the drop-down select either **EE Stage 3a: HoD supports/QUAD review inc RTW** to progress the nomination, or **EE Stage 99: Reject/Withdraw** to reject the nomination. The latter option can also be selected if the nominee withdraws their application before appointment is made.



You will be able to record the reason for your decision in the **Stage notes** free text box; please note that these comments can be viewed by any colleague involved in the nomination process. It is important that you tick the checkbox in the Applicants section before clicking **Save**. This confirms that your decision is final and **without checking this the nomination will not be progressed.**



After you tick the checkbox and click **Save**, the Quality and Academic Development Team will receive an email asking them to check the details of the nomination before moving the nomination onto the next stage: Dean Authorisation.

If you do not support the nomination, you can select to move to the Reject stage; please add the details of why you are rejecting the nomination. Once this step is completed, an email will be automatically generated and sent to QUAD, who will inform the Department administrator.

Nomination outcome

There are several potential outcomes that you can determine following initial review of the nomination submission. The outcome you select will be sent on to QUAD to take further action. More information on nomination outcomes is below:

- **Request for more information**

  A colleague in QUAD may send the nomination back to the Department to request more information. In this instance, an email will be sent to the nominated Departmental colleague for External Examiner nominations – usually the Department Manager – and the department may need to provided additional information or rationale for appointment to support the Dean's decision.

- **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 automated notification by email. QUAD will then send the External Examiner their contract and schedule of awards/modules, copying in the Department Manager.

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 People & Culture have set up the External Examiner as a University of Essex employee on their personnel systems, the External Examiner will be provided instructions for activating their Essex log-in credentials. External Examiners can use these credentials for accessing password-secured systems such as Box, FASER and Moodle, and can access their schedule of awards and modules via the External Examiner Report Portal.

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.

Useful links

- Criteria for nomination

- Nomination portal user guide

- Email QUAD

- General External Examiner Information

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

Document review information	
Document Owner	Quality and Academic Development
Document Author	Quality and Academic Development
Document last reviewed by	Quality Enhancement Manager – Cerys Somers
Date last reviewed by	01/08/24
Review frequency	Annually