

TQAE Connect (v1.2)

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Version History

Author	Date	Changes	Status
Kate Davies	14/3/2019	1 st Draft	V0.1
Kate Davies	18/3/2019	Published via TQAE comms	V1.1
Kate Davies	12/4/2019	Amended to include v1.2 changes	V1.2

Overview

The TQAE Connect portal is intended for two separate user groups:-

- For External Examiner use - when the External Examiner (EE) is nominated, they will be sent a link to the TQAE Connect portal so that they can check their nomination details, attach a CV and provide required information as part of a complete, paperless process.
- For College use – College staff from both PS and Academic areas can access the External Examiner Dashboard within the TQAE Connect portal in order to check on, approve/reject, and otherwise add information to, electronic forms as they move through the approval process.

The functions available through the TQAE Connect portal (v1.2) are:-

- Nominations for new or existing External Examiners (EEN);
- Extensions to existing EE contracts (EEE);
- The addition of programmes to an existing EE contract (EEAP);
- The generation and completion of an APAC Report (EER);
- The generation of finance forms for expenses and payments (PD94, PD98, PAYU, PAYP);
- The generation of the required Induction material for new EEs (EEI).

As the form passes through the approval process, automatic emails are generated and dispatched to the appropriate personnel for each stage. For speed and efficiency, the email contains an appropriate link to take the recipient directly to the form that requires actioning. In addition, an authorised person can log in and view the EE Dashboard, which will provide a real-time view of the status of any forms that are in progress.

All forms carry a unique identifier composed of their form-type prefix, and a sequential number automatically allocated by the system – e.g., EEN-246, or EEI-42.

Dashboards

There are a number of ‘views’ or Dashboards that summarise and present the headline activity currently in progress, with an indication of the type and status of the form, and who it relates to. Any record currently locked (in use and potentially open elsewhere) is shown in red. Records in locked state can be viewed but not edited.

The **External Examiner Dashboard** is most likely to be used by University staff – it presents a high-level picture of which Nomination, Extension, Additional Programme and Finance forms are in progress, and who the current action resides with.

The **External Examiner Portal** is the repository for information, and method of submission, for External Examiners throughout their contract with the University.

The **Annual Report Dashboard** allows the creation, search and status display specifically relating to Annual Reports – in the same way that the EE Dashboard does for the Nomination, Extension and Additional Programme forms.

Nomination, Extension and Additional Programme Process

- The form prefix for Nominations is EEN; for Extensions EEE; and for Additional Programmes EEAP.
- The Nomination process can be used both for new examiners, who have not so far held any appointment with the University; or alternatively a new nomination can be made for any existing examiner.
- An Extension or Additional Programme can only be processed against an existing EE.

The complete Nomination, Extension and Additional Programme workflow is as follows:

- Draft: Q&S or Discipline creates a new form.
- Status 1: EE reviews form, attaches CV and accepts Nomination/Extension/Additional Programme.
- Status 2: Q&S review form.
- Status 3: *[Optional] Discipline Contact adds supporting statement if not present.*
- Status 4: ADR reviews form if Research appointment.
- Status 5: ADE reviews form if UG/PG appointment.
- Status 6: *[Optional] PI reviews form if appropriate.*
- Status 7: Q&S adds recommendation to approve/reject.
- Status 8: ADS approves or rejects.
- Status 9: EE accepts contract terms.
- Status 10: Complete.

Note: If a form is rejected at any stage, it returns directly to the Q&S team for review and action.

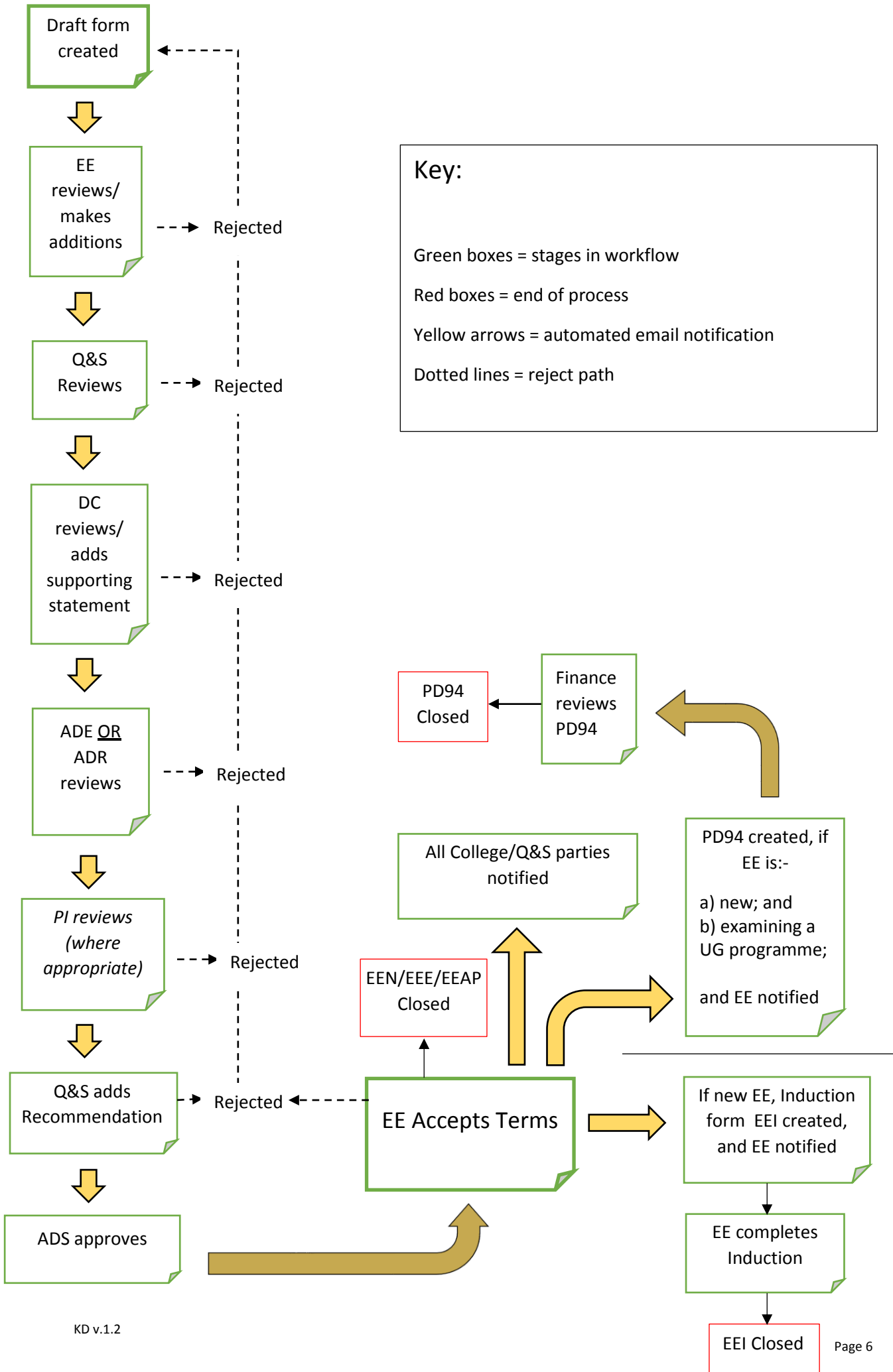
Downstream Processes

When an EE accepts terms at Stage 9, this one action triggers a number of events:


- The EEN/EEE/EEAP form reaches Stage 10 (Complete) and can be archived from the EE Dashboard by selecting the Close option from within the form.
- For the Nomination process, if the nomination is for a new EE examining an undergraduate programme, a PD 94 form will be generated automatically, and an automated email will be sent to the EE containing a link to the relevant form, requesting them to complete it via the TQAE Connect portal.
- An induction form, prefixed EEI, will also be generated automatically, and an automated email will be sent to the EE containing a link to the form and a request for them to complete it via the TQAE Connect portal.
- All interested parties in the College and the Q&S team (plus any other party specified in the form itself) will also be informed by automated email that the nomination process for this EE is complete.

Workflow

The complete workflow for a Nomination, Extension or Additional Programme is captured in the following flow-chart.



Nomination Form – Initial Creation (DC or Q&S)



External Examiner - Nomination Form
Current Status : Draft, Assigned To : N/A

Details Of Proposed External Examiner (Visible To EE)

Do you want to create a new external examiner? Select

Details Of Programme (Visible To EE) Select

Details Of Proposed External Examiner (Visible To EE)

Do you want to create a new external examiner? Yes

Title*

Surname*

Forename*

Home Address

Country

Post code

Telephone

Email*

Please indicate the nature of any reciprocal/collaborative work with college/institution staff

Does the nominee have previous experience as an external examiner? Select

Please attach current CV ensuring that any current or recent external examiner appointments are listed

Attach CV

Drop files here

Select File Please select file(s) to upload.

Create new EE?

Select **Yes** to create a new record for an EE not currently working with the University.

Select **No** to re-use one of the EEs already working with us (a picklist of current EEs will show).

Details Of Programme (Visible To EE)

College / Discipline Contact Details

College Contact (Rejected requests will go back to this person) Search

Discipline Contact Search

Programme Details

College/Institution*

- Please Select..
- Business School
- CEMPS
- CLES
- Exeter College
- HUMS
- INTO University of Exeter
- Medical School
- SSIS

Working With Partner Institution*

- Please Select..
- No
- Yes

College/Discipline Contacts

Enter the surname of the relevant Contact in the field and click the Search button. Matching records will be displayed from our staff list, which you can select from.

College/Institution

Select the relevant College from the drop-list.

Partner Institution?

The default is No, unless you have selected INTO as the College – but this can be overridden if required. If a PI is involved in the Nomination, you will be prompted for details later in the form.

<p>Discipline 1 (Owning)*</p> <p>Discipline 2</p> <p>Discipline 3</p>	<p>Please Select..</p> <p>Please Select..</p> <p>CEMPS - All</p> <p>Civil Engineering (CIE)</p> <p>Computer Science (COM)</p> <p>Electronic Engineering (ELE)</p> <p>Energy Engineering (Renewables) (ENE)</p> <p>General Engineering (GEE)</p> <p>Geology (GEL)</p> <p>Mathematics (MAT)</p> <p>Mechanical Engineering (MEE)</p> <p>Mining and Materials (MIN)</p> <p>Other (Please specify)</p> <p>Physics and Astronomy (PHY)</p>	<p>Owning Discipline</p> <p>The list of Disciplines is filtered on your choice of College above. You can select up to three disciplines, but you must select at least one.</p>
<p>Delivery location*</p> <p>Other, please specify</p>	<p><input type="checkbox"/> At Partner Institution/s, please specify below</p> <p><input type="checkbox"/> Cornwall (Penryn Campus)</p> <p><input type="checkbox"/> Cornwall (Truro Campus)</p> <p><input type="checkbox"/> Exeter (St Luke's Campus)</p> <p><input type="checkbox"/> Exeter (Streatham Campus)</p> <p><input type="checkbox"/> Via Distance Learning</p> <p></p>	<p>Delivery Location</p> <p>Select all that apply.</p> <p>If the first option (PI) is checked, then specify the location in the Other field below.</p>
<p>Level of award*</p>	<p>Please Select..</p> <p>Please Select..</p> <p>Postgraduate</p> <p>Pre-undergraduate</p> <p>Research</p> <p>Undergraduate</p>	<p>Level of Award</p> <p>Select one Award Level.</p> <p>Note that 'Pre-undergraduate' is for INTO programmes.</p>
<p>Level of award*</p> <p>Award(s)*</p>	<p>Undergraduate</p> <p>Please Select..</p> <p>Please Select..</p> <p>BA</p> <p>BA (Hons)</p> <p>BA (Hons) Intercalated</p> <p>BA (Hons)/ BSc (Hons)</p> <p>BA Law</p> <p>BClinSci</p> <p>BClinSci (Hons)</p> <p>BEng</p> <p>BMedSci</p> <p>BMedSci (Hons)</p> <p>BSc</p> <p>BSc (Hons)</p> <p>BSc (Hons) Intercalated</p> <p>CertHE</p> <p>DipHE</p> <p>FD</p> <p>GradCert</p> <p>GradDip</p> <p>LLB</p> <p>Add</p>	<p>Award(s)</p> <p>The Awards drop-list is filtered by your selection in the previous field. You can select more than one Award but each has to be added to the list separately.</p>
<p>Programmes examined by the external examiner*</p>	<p></p>	<p>Programmes Examined</p> <p>List the programmes the EE is going to be examining. (This is a free text field.)</p>
<p>If the appointment is for more than one programme, will an additional Annual report need to be completed (NB two reports = two payments)*</p>	<p>Please Select..</p>	<p>Annual Report</p> <p>Specify whether more than one Report will need to be completed.</p>
<p>Name any professional, statutory or regulatory bodies accrediting this programme (if any)*</p> <p>Do the external examiner's qualifications meet the criteria set by the professional, statutory or regulatory bodies listed above*</p>	<p></p> <p>Please Select..</p>	<p>Accreditation</p> <p>List the accrediting bodies, where applicable; and also whether the EE's qualifications meet their criteria.</p>

Academic years to be covered by appointment

Start academic year* 2018/2019

End academic year* 2018/2019

2018/2019
2019/2020
2020/2021
2021/2022
2022/2023
2023/2024
2024/2025
2025/2026
2026/2027
2027/2028
2028/2029

Is the proposed examiner replacing a retiring examiner?* Yes

Name of retiring examiner, if replacing more than one list all.*

Confirmation of different institution
Confirm that the proposed external examiner is from a different institution than the outgoing external examiner(s) as conse

Outgoing external examiner institution name*

Academic Years
Specify both the starting and ending academic years to be covered by this appointment.

Replacing Retiring Examiner
Specify whether the new appointment is to replace a retiring examiner, and if so, which. You will also need to confirm the name of the institution the retiree belongs to, as a check against consecutive appointments.

College's Rationale For The Proposal

Information on what to include can be found in the [Teaching Quality Assurance Manual](#)

Please provide a supporting statement

Supporting Statement
Normally completed by the Discipline Contact, so an entry here is not mandatory at this stage.

Notifications On Completion

Any of the users / groups added below will be notified on completion of the nomination process.

Users Selection

Search For U

Notifications
Add here any additional named contacts who should be informed when the Nomination process is complete. Enter their surname in the search field and a list of matching staff names will be presented when you click Search.

Save Submit

Cancel

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Actions

Save – captures the data entered so far but keeps the form in Draft status.

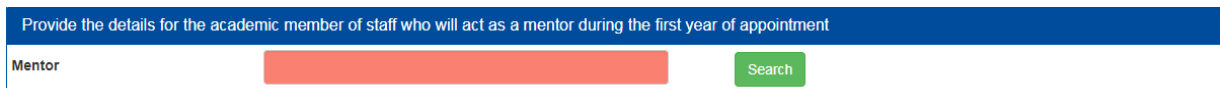
Submit – once all mandatory fields are complete, this will move the form to the next stage in the process.

Cancel – abandons all input and exits to the Dashboard.

Nomination Form – Q&S Review Stage 2

Once the Nomination form has been accepted by the External Examiner, it returns to the Q&S team for review of the information added by the EE.

The form layout is fundamentally the same, with the possible addition of a Mentor field IF the EE has specified that they don't have previous examining experience. The Mentor field appears within the College Rationale section:

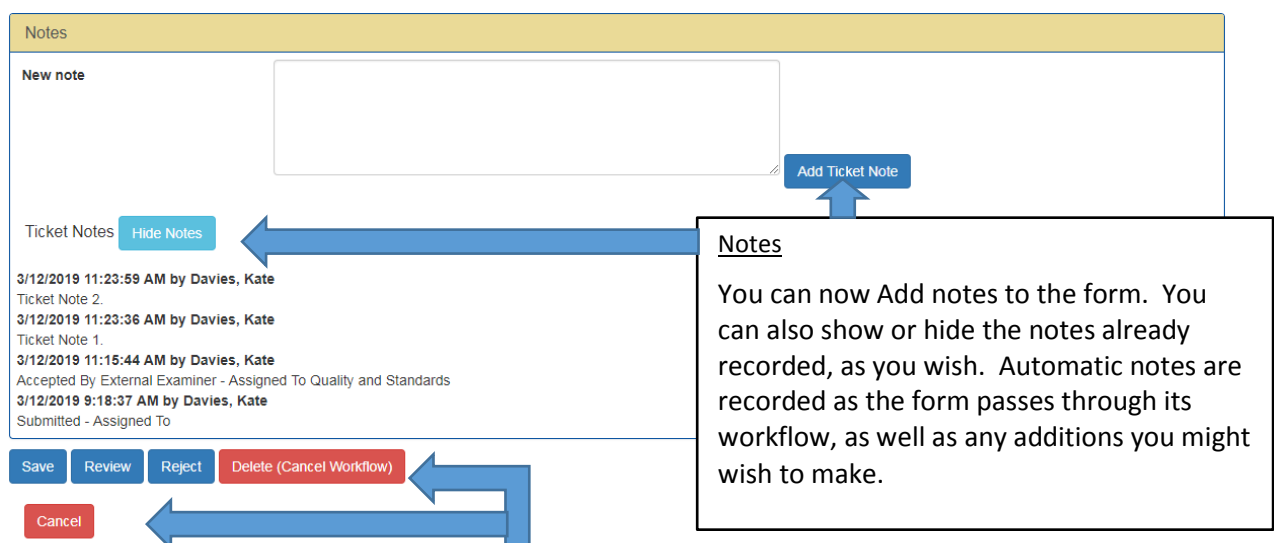


Provide the details for the academic member of staff who will act as a mentor during the first year of appointment

Mentor

Simply add the appropriate Mentor by searching for their Surname. This is a mandatory field, if it's displayed.

You will also see that from this stage onwards, you now have the ability to add notes to the form:



Notes

New note

Ticket Notes

3/12/2019 11:23:59 AM by Davies, Kate
Ticket Note 2.
3/12/2019 11:23:36 AM by Davies, Kate
Ticket Note 1.
3/12/2019 11:15:44 AM by Davies, Kate
Accepted By External Examiner - Assigned To Quality and Standards
3/12/2019 9:18:37 AM by Davies, Kate
Submitted - Assigned To

Notes
You can now Add notes to the form. You can also show or hide the notes already recorded, as you wish. Automatic notes are recorded as the form passes through its workflow, as well as any additions you might wish to make.

Actions

Save – captures the data entered so far but keeps the form in the current stage of the workflow.

Review – once all mandatory fields are complete, this will move the form to the next stage in the process.

Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S.

Delete – this will delete the form from the workflow and the Dashboard. Forms with 'Deleted' status can still be listed within the SharePoint tables, but cannot be edited.

Cancel – abandons all input and exits to the Dashboard.

Nomination Form – Q&S Recommendation Stage 7

When the Nomination form has been approved by either the ADE or ADR, depending on the programme, and also has been approved by any Partner Institution involved with the programme, it will return to the Q&S team for one final step prior to going on to the ADS.

At this point the Q&S team will need to record a recommendation as to whether the Nomination should be accepted or rejected. The ADS will base their decision on this recommendation.

The Recommendation is a free-text field into which the Q&S team can enter any details relevant to their choice:

The screenshot shows a web form titled "Quality & Standards Recommendation". The main section is "Recommendation*", which contains a text area with the placeholder text "I recommend acceptance." A blue arrow points from a callout box to this text area. The callout box is titled "Recommendation" and contains the text: "This is a free-text field into which you can enter a recommendation as to whether to accept or reject, to assist the ADS with their final decision." Below the recommendation field is a section titled "Notifications On Completion" with a note: "Any of the users / groups added below will be notified on completion of the nomination process." This section includes a "Users Selection" area with a search input, a "Remove" button, and a "Search For User" button. Below that is a "Notes" section with a "New note" text area and an "Add Ticket Note" button. At the bottom of the form are buttons for "Save", "Approve", "Reject", and "Cancel".

Note that this recommendation is in addition to the normal option to reject any form not meeting standards, by choosing Reject at the foot of the form. However, in order for the ADS to have sight of the Recommendation made by Q&S, the form must be Approved, even if the Recommendation is to reject the Nomination itself.

Extension Form – Initial Creation (DC or Q&S)

The layout of the Extension form is very similar to the Nomination form, and follows the same workflow. However, an Extension can only be processed against an existing External Examiner.

External Examiner - Extension To Current Appointment Form
Current Status : Draft. Assigned To : N/A

Details External Examiner (Visible To EE)

Select External Examiner: Dr Talia Trusham

Title*: Dr
Surname*: Trusham
Forename*: Talia
Home Address: 227b Baker Street, London
Country: United Kingdom
Post code: ex1 2lu
Telephone: 657567
Email*: k.davies@exeter.ac.uk
Attach CV: 3250.pdf

Select External Examiner
Enter the surname of the EE to which the extension applies, and click Search.

EE Details
The current details of the selected EE will be displayed, along with their current CV. You cannot edit these details.

Details Of Current Appointment (Visible To EE)

College / Discipline Contact Details

College Contact (Rejected requests will go back to this person)
Discipline Contact

Programme Details

College/Institution*: Please Select...
Working With Partner Institution*: Please Select...
Discipline 1 (Owning)*: Business School, CEMPS, CLES, Exeter College, HUMS
Discipline 2: INTO University of Exeter
Discipline 3: Medical School, SSIS

Current Appointment
Enter the details of the EE's current appointment.

Note that this section of the form now follows the format of the Nomination form. Full details are provided in the Nomination section above.

Form continues as per Nomination.....

Academic years currently covered by appointment

Start academic year*: 2018/2019
End academic year*: 2022/2023

Academic years to be covered by appointment

Start academic year*: 2018/2019
End academic year*: 2027/2028

Dates
In the Date section there are now two elements.
Enter the Start/End dates of the current contract.
Enter the proposed extended dates of the contract.

College's Rationale For The Proposal

Information on what to include can be found in the [Teaching Quality Assurance Manual](#)

Please provide a supporting statement

Supporting Statement

Normally completed by the Discipline Contact, so an entry here is not mandatory at this stage.

Notifications On Completion

Any of the users / groups added below will be notified on completion of the nomination process.

Users Selection

Notifications

Add here any additional named contacts who should be informed when the Extension process is complete. Enter their surname in the search field and a list of matching staff names will be presented when you click Search.

Save Submit

Cancel

Actions

Save – captures the data entered so far but keeps the form in Draft status.

Submit – once all mandatory fields are complete, this will move the form to the next stage in the process.

Cancel – abandons all input and exits to the Dashboard.

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Extension Form – Q&S Review Stage 2

The Review process at Stage 2 is identical to Nomination.

Notes

You can now Add notes to the form. You can also Show or Hide the notes already recorded, as you wish. Automatic notes are recorded as the form passes through its workflow, as well as any additions you might wish to make.

Add Ticket Note

Notes

New note

Hide Notes

3/12/2019 11:23:59 AM by Davies, Kate
Ticket Note 2.

3/12/2019 11:23:36 AM by Davies, Kate
Ticket Note 1.

3/12/2019 11:15:44 AM by Davies, Kate
Accepted By External Examiner - Assigned To Quality and Standards

3/12/2019 9:18:37 AM by Davies, Kate
Submitted - Assigned To

Save Review Reject Delete (Cancel Workflow)

Cancel

Actions

Save – captures the data entered so far but keeps the form in the current stage of the workflow.

Review – once all mandatory fields are complete, this will move the form to the next stage in the process.

Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S.

Delete – this will delete the form from the workflow and the Dashboard. Forms with 'Deleted' status can still be listed within the SharePoint tables, but cannot be edited.

Cancel – abandons all input and exits to the Dashboard.

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Extension Form – Q&S Recommendation Stage 7

The Recommendation step at Stage 7 is identical to Nomination:

The screenshot displays the 'Quality & Standards Recommendation' form. It features several sections and controls:

- Quality & Standards Recommendation** (Section Header)
- Recommendation***: A text area containing the text "I recommend acceptance." A blue arrow points from a callout box to this area.
- Notifications On Completion** (Section Header)
- Any of the users / groups added below will be notified on completion of the nomination process.** (Text)
- Users Selection**: A dropdown menu, a search input field, and buttons for "Remove" and "Search For User".
- Notes** (Section Header)
- New note**: A text area for adding notes, with an "Add Ticket Note" button.
- Ticket Notes**: A section with a "Show Notes" button.
- Buttons**: "Save", "Approve", "Reject", and "Cancel".

Recommendation
This is a free-text field into which you can enter a recommendation as to whether to accept or reject, to assist the ADS with their final decision.

Additional Programme Form – Initial Creation (DC or Q&S)

The Additional Programme form has the same basic layout as the Nomination and Extension forms. Like the Extension, it can only be raised against an existing EE.

External Examiner - Extension To Current Appointment Form
Current Status : Draft. Assigned To : N/A

Details External Examiner (Visible To EE)

Select External Examiner

Title*	<input type="text" value="Dr"/>
Surname*	<input type="text" value="Trusham"/>
Forename*	<input type="text" value="Talia"/>
Home Address	<input type="text" value="227b Baker Street
London"/>
Country	<input type="text" value="United Kingdom"/>
Post code	<input type="text" value="ex1 2lu"/>
Telephone	<input type="text" value="657567"/>
Email*	<input type="text" value="k.davies@exeter.ac.uk"/>
Attach CV	<input type="button" value="3250.pdf"/> <input type="button" value="Remove Attachment"/> <input type="button" value="Download"/>

Details Of Current Appointment (Visible To EE)

Programme Details

College/Institution*	<input type="text" value="Please Select.."/>
Working With Partner Institution*	<input type="text" value="Please Select.."/>
Discipline 1 (Owning)*	<input type="text"/>
Discipline 2	<input type="text"/>
Discipline 3	<input type="text"/>
Delivery location*	<input type="checkbox"/> At Partner Institution/s, please specify below <input type="checkbox"/> Cornwall (Penryn Campus) <input type="checkbox"/> Cornwall (Truro Campus) <input type="checkbox"/> Exeter (St Luke's Campus) <input type="checkbox"/> Exeter (Streatham Campus) <input type="checkbox"/> Via Distance Learning
Other, please specify	<input type="text"/>
Level of award*	<input type="text" value="Please Select.."/>
Programmes examined by the external examiner*	<input type="text"/>

Select External Examiner
Enter the surname of the EE to which the extension applies, and click Search.

EE Details
The current details of the selected EE will be displayed, along with their current CV. You cannot edit these details.

Current Appointment
Enter the details of the EE's current appointment – College, Discipline(s), Location(s), Awards and the list of Programmes currently examined by this EE (for full details, see Nomination process above).

Details Of Additional Appointment (Visible To EE)

College / Discipline Contact Details

College Contact (Rejected requests will go back to this person)

Discipline Contact

Programme Details

College/Institution*

Working With Partner Institution*

Discipline 1 (Owning)*

Delivery location* At Partner Institution/s, please specify below
 Cornwall (Penryn Campus)
 Cornwall (Truro Campus)
 Exeter (St Luke's Campus)
 Exeter (Streatham Campus)
 Via Distance Learning

Other, please specify

Level of award*

Programmes examined by the external examiner*

If the appointment is for more than one programme, will an additional Annual report need to be completed (NB two reports = two payments)?*

Name any professional, statutory or regulatory bodies accrediting this programme (if any)*

Do the external examiner's qualifications meet the criteria set by the professional, statutory or regulatory bodies listed above*

Additional Appointment

Enter the details of the proposed Additional Appointment – Contacts, College, Partner Institutions, Discipline(s), Location(s), Awards and the list of Programmes currently examined by this EE (for full details, see Nomination process).

.....From this point forward, the Additional Programmes form is identical to the Nomination form....

College's Rationale For The Proposal

Information on what to include can be found in the [Teaching Quality Assurance Manual](#)

Please provide a supporting statement

Supporting Statement

Normally completed by the Discipline Contact, so an entry here is not mandatory at this stage.

Notifications On Completion

Any of the users / groups added below will be notified on completion of the nomination process.

Users Selection

Notifications

Add here any additional named contacts who should be informed when the Extension process is complete. Enter their surname in the search field and a list of matching staff names will be presented when you click Search.

Actions

Save – captures the data entered so far but keeps the form in Draft status.
Submit – once all mandatory fields are complete, this will move the form to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.

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Additional Programme Form – Q&S Review Stage 2

The Review process at Stage 2 is identical to Nomination and Extension.

The screenshot shows the 'Notes' section of the form. At the top, there is a yellow header 'Notes'. Below it is a 'New note' section with a text input field and an 'Add Ticket Note' button. A blue arrow points from the 'Add Ticket Note' button to a callout box. Below the 'New note' section is a 'Ticket Notes' section with a 'Hide Notes' button. A blue arrow points from the 'Hide Notes' button to another callout box. Below the 'Ticket Notes' section is a list of notes with timestamps and user names. At the bottom of the form, there is a row of buttons: 'Save', 'Review', 'Reject', and 'Delete (Cancel Workflow)'. A blue arrow points from the 'Delete (Cancel Workflow)' button to a callout box. Below the buttons is a 'Cancel' button. At the bottom left of the page, there is a copyright notice: '© 2019 - TQAE Connect : Version:1.0.0.54' and 'For support email TQAE Connect Support'.

Notes

You can now Add notes to the form. You can also Show or Hide the notes already recorded, as you wish. Automatic notes are recorded as the form passes through its workflow, as well as any additions you might wish to make.

Actions

Save – captures the data entered so far but keeps the form in the current stage of the workflow.

Review – once all mandatory fields are complete, this will move the form to the next stage in the process.

Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S.

Delete – this will delete the form from the workflow and the Dashboard. Forms with 'Deleted' status can still be listed within the SharePoint tables, but cannot be edited.

Cancel – abandons all input and exits to the Dashboard.

Additional Programme Form – Q&S Recommendation Stage 7

The Recommendation step at Stage 7 is identical to Nomination:

Quality & Standards Recommendation

Recommendation*

Notifications On Completion

Any of the users / groups added below will be notified on completion of the nomination process.

Users Selection

Notes

New note

Ticket Notes

Recommendation

This is a free-text field into which you can enter a recommendation as to whether to accept or reject, to assist the ADS with their final decision.

External Examiner Views

The External Examiner is involved at two stages of the process to create a Nomination, Extension or Additional Programme:

- Stage 1: Review the initial form content, attach a current CV, and accept the nomination.
- Stage 9: Accept the Contract terms.

Accepting the contract terms will then trigger two further process:

- Creation of a PD94 to capture current bank details to enable electronic payment via Payroll if the programme is an Undergraduate programme;
- Creation of a PD98 form to enable ad-hoc payment if the programme is a Postgraduate programme;
- Creation of an Induction form IF the examiner is new to the University.

Review Initial Nomination Form Content

External Examiner - Nomination Form
Current Status : 1. External Examiner. Assigned To : Davies, Kate

Entry Form Locked By: Davies, Kate @ 12/03/19 09:23

Release Lock

Details Of Proposed External Examiner (Visible To EE)

Title*	<input type="text" value="Dr"/>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p><u>New EE Details</u></p> <p>These fields will show the details already recorded by the University when the Nomination process is started. They can be checked/amended as necessary.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p><u>Previous Experience (Mandatory)</u></p> <p>This drop-list is a Yes/No option – if Yes is selected, an additional free-text field will be displayed to enable further details to be entered.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p><u>Attach CV (Mandatory)</u></p> <p>Select and attach a current CV.</p> </div>
Surname*	<input type="text" value="Trusham"/>	
Forename*	<input type="text" value="Talia"/>	
Home Address*	<input type="text" value="227b Baker Street
London"/>	
Country*	<input type="text" value="United Kingdom"/>	
Post code*	<input type="text" value="ex1 2lu"/>	
Telephone*	<input type="text" value="657567"/>	
Email*	<input type="text" value="k.davies@exeter.ac.uk"/>	
Please indicate the nature of any reciprocal/collaborative work with college/institution staff		
Does the nominee have previous experience as an external examiner?	<input type="text" value="Select"/>	
Does the nominee have previous experience as an external examiner?	<input type="text" value="Yes"/>	
Details of previous experience*		
Please attach current CV ensuring that any current or recent external examiner appointments are listed		
Attach CV*	Drop files here	
Select File		Please select file(s) to upload.

College / Discipline Contact Details

College Contact (Rejected requests will go back to this person)

Discipline Contact

Programme Details

External Examiners Primary College

College/Institution*

Working With Partner Institution*

Discipline 1 (Owning)*

Discipline 2

Discipline 3

Delivery location* At Partner Institution/s, please specify below
 Cornwall (Penryn Campus)
 Cornwall (Truro Campus)
 Exeter (St Luke's Campus)
 Exeter (Streatham Campus)
 Via Distance Learning

Other, please specify

Level of award*

Award(s)*

Programmes examined by the external examiner*

If the appointment is for more than one programme, will an additional Annual report need to be completed (NB two reports = two payments)?*

Name any professional, statutory or regulatory bodies accrediting this programme (if any)*

Do the external examiner's qualifications meet the criteria set by the professional, statutory or regulatory bodies listed above*

Academic years to be covered by appointment

Start academic year*

End academic year*

Is the proposed examiner replacing a retiring examiner?*

Programme Details

These fields will show the details already recorded by the University when the Nomination process is started. They cannot be amended at this stage.

Accept Appointment

Accept Appointment will move the form on to the next stage.
Reject Appointment will return it to the Q&S team for assessment and action.
Cancel will abandon input and leave the form unedited.

Accept Contract Terms

Once the form has passed through the University's approval process, it will be returned to the nominee at Stage 9, to accept or reject the terms of the appointment.

The content of the form cannot be changed at this stage; however, a new declaration section is now displayed at the foot of the form, which also contains a link to the nominee's contract details:

The screenshot shows a web form titled "Terms & Conditions / Contract". At the top left is a blue button labeled "View Contract Details". Below it is a line of text: "Please read the documents on the above link, and then check the box below before clicking on Accept." This is followed by a declaration: "I accept the contract and terms in the document above*" with an unchecked checkbox. Below the declaration are two buttons: "Accept Terms" (blue) and "Cancel" (red). A callout box on the right, titled "Accept Terms", contains the text: "If the contract terms are acceptable, check the box and click Accept Terms. **Cancel** will abandon input and leave the form in its unedited state." Two blue arrows point from the callout box to the checkbox and the "Accept Terms" button. At the bottom left, there is a footer: "© 2019 - TQAE Connect : Version:1.0.0.54" and "For support email TQAE Connect Support".

PD94 Form (Undergraduate Programmes, payroll entry)

- The PD94 will request all relevant personal data from the External Examiner, including bank details, in order to make BACS payments. It must be completed and digitally signed by the EE themselves.
- The PD94 will also ask for ethnic/gender monitoring data, a declaration of tax status, and will provide the opportunity to attach documentation (e.g. a P45).
- When the EE submits their completed PD94, an automated email will be generated to notify the Finance team that this is now available. Finance can then create payment details in University systems. Once Finance have actioned this, the form can be closed and archived from the Dashboard.
- If Finance find any issues with the PD94, they will return the form to Q&S for investigation.

PD94 form on screen:

The screenshot shows the PD94 form interface. At the top, there is a blue header with the University of Exeter logo and the text 'External Examiner - PD94' and 'Current Status : 1. Awaiting Completion By EE. Assigned To : Davies, Kate'. Below this is an orange bar indicating 'Entry Form Locked By: Davies, Kate @ 08/03/19 11:16' with a 'Release Lock' button. A blue box contains the 'STARTER FORM FOR NEW EXTERNAL EXAMINERS (UNDERGRADUATE)' instructions. The form is divided into two sections: 'SECTION A: INFORMATION ABOUT YOU' and 'SECTION B: INFORMATION ABOUT CURRENT/PREVIOUS WORK AT THE UNIVERSITY'. Section A contains various fields, some highlighted in green. Section B contains a dropdown menu and a text input field. Annotations with blue arrows point to these fields, explaining that green highlights indicate data retrieved from stored data, and the dropdown in Section B is a Yes/No list that triggers a secondary field.

Section A

The items in green are retrieved from stored data, but can be edited.

Section B

This is a Yes/No drop-list, and choosing Yes will expose a secondary field requesting a payroll number.

SECTION A: INFORMATION ABOUT YOU	
Title*	Dr
Surname*	Harris
Forename*	Connor
Home Address*	47b Kilburn High Road London
Country*	United Kingdom
Post code*	EX1 2LU
Work Address	
Work Country	Please Select..
Post code	
Telephone*	56465456
Email*	k.davies@exeter.ac.uk
National Insurance Number*	

SECTION B: INFORMATION ABOUT CURRENT/PREVIOUS WORK AT THE UNIVERSITY	
Do you have any other current or previous employment at the University?*	Select
Please state your person/employee/payroll number (from pay advice)*	

SECTION C: EQUAL OPPORTUNITIES INFORMATION

As part of its commitment to equal opportunities, the University monitors its workforce by sex, ethnicity, disability and nationality. In addition, the University is under a statutory obligation to provide certain information to the Higher Education Statistics Agency (HESA) on an anonymous basis about the individuals who work for the University. Further information is available on the University website under HR management of information. To assist with this monitoring, please complete the information below. (The categories for ethnic origin and type of disability are prescribed by HESA.)

Date of birth (dd/mm/yyyy)*

Gender* Please Select..

Ethnic Origin* Please Select..

Nationality* Please Select..

Disability
The University of Exeter welcomes people with disabilities and aims to be supportive in their employment. We will be pleased to consider facilities when working for the University. (Under the Disability Discrimination Act (DDA) a disability is defined as physical, sensory or mental long-term adverse effect on a person's ability to carry out normal day to day activities.)

Do you consider yourself to have a disability? Select

Section C

All fields, apart from Disability status, are mandatory here.

SECTION D: INFORMATION FOR PAYMENT AND TAX PURPOSES

Name of Bank*

Branch Name*

Sort Code*

Account Number*

Account Name*

Roll Number (Building Society)

Please attach below
If you are of pensionable age, please attach Department of Work and Pensions form CA4140
If maximum NI contributions are paid in other employment, please attach Department of Work and Pensions form CA2700
To ensure that you pay the correct amount of tax, please read all the following statements carefully select the box that applies to you. **Please attach your P45 if you have one or forward this to the Payroll Office as soon as you receive it.**

Select One*

- This is my first job since last 6 April and I have not been receiving taxable Jobseeker's Allowance or taxable Incapacity Benefit or a state or occupational pension.
- This is now my only job, but since last 6 April I have had another job, or have received taxable Jobseeker's Allowance or Incapacity Benefit. I do not receive a state or occupational pension.
- I have another job or receive a state or occupational pension.

Student Loans
If you left a course of Higher Education before last 6 April and received your first Student Loan instalment on or after 1 September 1998 the box below. (If you are required to repay your Student Loan through your bank or building society account do not check below.)

Section D - Bank Details

Bank details are required in order to create a BACS payment authority.

Section D - Tax Declaration

Select the appropriate tax statement.

Section D – Student Loan

Check the box if it applies.

SECTION E - DECLARATION

I confirm that the information given above is correct*

Attachments / Notes

Attachments

Attachments Drop files here

Section E

Declaration check-box.

Attachments

Select and attach any necessary documents, e.g., P45.

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Actions

Save – captures the data entered so far but keeps the form in Draft status.
Submit – once all mandatory fields are complete, this will move the form to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.

PD98 Form (Postgraduate Programmes, APACs Payments only)

- The PD98 will request all relevant personal data from the EE, including their bank details, in order to make a one-off BACS payment. It must be completed and digitally signed by the EE themselves.
- When the EE submits their completed PD98, an automated email will be generated to notify the Finance team that this is now available.
- If Finance find any issues with the PD98, they will return the form to Q&S for investigation.

PD98 form on screen:



External Examiner - PD98
Current Status : 1. Awaiting Completion By EE. Assigned To : Davies, Kate

Entry Form Locked By: Davies, Kate @ 08/03/19 11:09

Release Lock

BANK ACCOUNT FORM FOR EXTERNAL EXAMINERS (POSTGRADUATE)

1. The University prefers to make payment to external suppliers through BACS. This ensures that the payment reaches your bank account more quickly and there is no risk of a cheque being lost or delayed in the post.
2. Please complete all sections of the form below. Incomplete forms may lead to a delay in you receiving your payment.

SECTION A: INFORMATION ABOUT YOU

Title*	Miss
Surname*	Patterson
Forename*	Polly
Home Address*	12 Peyton Place
Country*	United Kingdom
Post code*	EX1 2LU
Work Address	
Work Country	Please Select...
Post code	
Telephone*	347635645
Email*	k.davies@exeter.ac.uk

BANK DETAILS

Name of Bank*	
Branch Name*	
Sort Code*	
Account Number*	
Account Name*	
Roll Number (Building Society)	

DECLARATION

I confirm that the information given above is correct*

Save Submit

Cancel

Induction Form

- Once a new External Examiner has Accepted Terms on their contract, a new starter Induction form will be generated automatically, and an email invite sent to the EE with a link to their form. If an EE already has a contract with the University, no Induction form will be generated.
- The Induction form provides essential information on working for the University, and requires the EE to confirm their agreement and acceptance by ticking a confirmation checkbox.

Induction form declaration on screen:

The screenshot shows a form titled 'Completion' with the following elements:

- Declaration:** A checkbox next to the text 'I confirm that I have read and understood the above information.*'. A callout box explains that this checkbox must be selected to submit the form.
- Suggestions:** A dropdown menu labeled 'Do you have any suggestions for improvements to the Induction Module?*' with a 'Select' button. A callout box explains it is a Yes/No drop-list, and if 'Yes' is selected, a free-text field for comments will appear.
- Actions:** Three buttons: 'Save' (blue), 'Submit' (blue), and 'Cancel' (red). A callout box explains their functions: 'Save' captures data but keeps the form in Draft; 'Submit' moves the form to the next stage; 'Cancel' abandons input and exits to the Dashboard.

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Discipline Contact Views

The Discipline Contact is involved at one stage of the process to create a new Nomination, add an Extension, or add an Additional programme. However, this involvement may come into play at either of two possible points:

Either:-

- Stage 0 (Draft): If the Discipline contact is themselves creating the process form for an EE, then as part of that form creation, they will add a Supporting Statement to the form at the same time as creating it. For details on how to initiate the workflow and complete a Draft form from scratch for any of the three forms, please see Page 7 of this guide.

Or:-

- Stage 3 (DC Review): If the process form has been created by the Q&S team, then the Discipline Contact will only be required to add a Supporting Statement at Stage 3, and review the content of the form. Note that for all three forms, the action to complete the Supporting Statement looks identical.

(See flowchart on Page 6)

DC Review Stage 3 on screen

The screenshot shows the 'DC Review Stage 3' interface. At the top, there is a yellow header 'College's Rationale For The Proposal'. Below it, a blue box contains the text 'Please provide a supporting statement*' with a red asterisk and a link to the 'Teaching Quality Assurance Manual'. A blue arrow points from this callout box to the text area. Below this is a 'Notifications On Completion' section with a yellow header and a blue box containing instructions about user notifications and a 'Search For User' button. The 'Notes' section has a yellow header and a blue box for 'New note' with an 'Add Ticket Note' button below it. At the bottom, there is a 'Ticket Notes' section with a 'Show Notes' button and a row of action buttons: 'Save', 'Review', 'Reject', 'Delete (Cancel Workflow)', and 'Cancel'. Blue arrows point from the 'Actions' callout box to each of these buttons.

Supporting Statement (Mandatory)
The key action at Stage 3 of the workflow is for the Discipline Contact to provide a supporting statement for the Nomination, Extension or Additional Programme. There is a link to the Teaching Quality Assurance Manual, for helpful guidance on what to include.

Notes
You can add notes to the form. You can also show or hide the notes already recorded, as you wish. Automatic notes are recorded as the form passes through its workflow, as well as any additions you might wish to make.

Actions
Save – captures the data entered so far but keeps the form in the current stage of the workflow.
Review – once all mandatory fields are complete, this will move the form to the next stage in the process.
Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S.
Delete – this will delete the form from the workflow and the Dashboard. Forms with 'Deleted' status can still be listed within the SharePoint tables, but cannot be edited.
Cancel – abandons all input and exits to the Dashboard.

ADE/ADR Views

The ADE/ADR is involved at a single stage of the process to create a new Nomination, add an Extension, or add an Additional programme. If the form concerns a Research programme, it will be passed to the ADR for review/approval at Stage 4; if the form concerns a Taught programme – UG or PG – then it will be passed to the ADE for review/approval at Stage 5. Note that EITHER Stage 4 OR Stage 5 will be used, not both (see flowchart on Page 6). In either case, the ADE/R's role is to review the information on the form, and either Approve it or Reject it. Note that for all three forms, the action to Approve the form at this stage is identical.

ADR/E Approval Stage 4 OR Stage 5 on screen

The screenshot displays a web form for ADR/E Approval. The form includes sections for 'College's Rationale For The Proposal', 'Please provide a supporting statement*', 'Notifications On Completion', 'Users Selection', 'Notes', 'Ticket Notes', and 'Rejection Reason*'. Blue arrows indicate the flow of actions: 'Add Ticket Note' leads to the 'Notes' section; 'Save', 'Approve', and 'Reject' buttons lead to the 'Actions' section; and 'Reject' leads to the 'Rejection Reason*' section.

Notes

Notes can be added to the form. Show/Hide will display any notes already recorded. Automatic notes are recorded as the form passes through its workflow, as well as any additions entered at any stage in the approval process.

Actions

Save – captures the data entered so far but keeps the form in Draft status.

Approve – this will move the form to the next stage in the process.

Cancel – abandons all input and exits to the Dashboard.

Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display for the reason for rejection to be entered.

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Partner Institution Views

If a Partner Institution is involved, they will be asked to review/approve the form at Stage 6 (see flowchart on Page 6).

Note that the action to Approve at Stage 6 is identical regardless of whether the form being approved is a Nomination, Extension or Additional Programme form.

For full details and explanation of the complete form as it appears on screen, please refer to the main Nomination process that appears earlier in this guide.

PI Approval Stage 6 on screen

The screenshot shows a web form for Partner Institution Approval Stage 6. It is divided into two main sections: 'Partner Institution Details' and 'Head Of Institution Details (For Approval)'. The 'Partner Institution Details' section includes fields for Institution* (AccountAbility), Contact Name* (Peter Potter), Telephone* (6457474), and Email* (k.davies@exeter.ac.uk). The 'Head Of Institution Details (For Approval)' section includes fields for Head Of Institution Name* (Felicity Carr) and Email* (k.davies@exeter.ac.uk). Below these sections are two sets of buttons: 'Approve' and 'Reject' (blue) and 'Cancel' (red). A 'Rejection Reason*' field contains the text 'Insufficient information.' and is followed by a 'Reject' (blue) and 'Cancel' (red) button. Blue arrows point from the 'Approve' and 'Cancel' buttons of the first section to the right, and from the 'Reject' button of the second section to the right. A text box on the right side of the form, titled 'Actions', provides definitions for these buttons.

Partner Institution Details	
Institution*	AccountAbility
Contact Name*	Peter Potter
Telephone*	6457474
Email*	k.davies@exeter.ac.uk

Head Of Institution Details (For Approval)	
Head Of Institution Name*	Felicity Carr
Email*	k.davies@exeter.ac.uk

Buttons: Approve, Reject, Cancel

Rejection Reason*: Insufficient information.

Buttons: Reject, Cancel

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Actions

Approve – this will move the form to the next stage in the process.

Cancel – abandons all input and exits to the Dashboard.

Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display for a reason for rejection to be provided.

ADS Views

The ADS is involved at a single stage of the process to create a new Nomination, add an Extension, or add an Additional programme. The ADS's role is to review the information on the form, and either Approve it or Reject it, at Stage 8 of the form's workflow (see flowchart on Page 6).

To assist the ADS with their decision, the Q&S team will have made a recommendation as to whether the form to be reviewed should be accepted or rejected, based on key requirements having been met.

Note that the action to Approve at Stage 8 is identical regardless of whether the form being approved is a Nomination, Extension or Additional Programme form.

For full details and explanation of the complete form as it appears on screen, please refer to the main Nomination process that appears earlier in this guide.

ADS Approval Stage 8 on screen

The screenshot displays the ADS Approval Stage 8 form. It includes sections for 'Quality & Standards Recommendation', 'Notifications On Completion', 'Notes', and 'Rejection Reason'. Callouts provide detailed explanations for these sections and the available actions.

Recommendation
The Q&S team will have made a recommendation as to approval/rejection, and added any relevant notes.

Notes
Notes can be added to the form. Show/Hide will display any notes already recorded. Automatic notes are recorded as the form passes through its workflow, as well as any additions entered at any stage in the approval process.

Actions
Save – captures the data entered so far but keeps the form in Draft status.
Approve – this will move the form to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.
Reject – this will drop the form out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display for a reason for rejection to be provided.

Rejection Reason*
Insufficient information.

APAC Reports

- The form prefix for APAC Reports is AR.
- APAC Reports in progress appear in the Annual Report Management Dashboard.
- An APAC report record is generated by a College Hub team, who also set the date for the Report.
- The APAC date is the trigger for all downstream processes.
- The complete APAC workflow is as follows:

Draft: Hub Team creates an APAC record.

Awaiting Date: Hub Team sets APAC date; date triggers workflow.

Status 2: EE completes report.

Status 3: Q&S review report

Status 4: *[Optional] If Q&S have made changes, EE reviews them.*

Status 5: Discipline Contact reviews.

Status 8: ADR/ADE reviews report.

Status 9: ADS reviews form.

Status 10: Complete.

Note: If a form is rejected at any stage, it returns directly to the Q&S team for review and action.

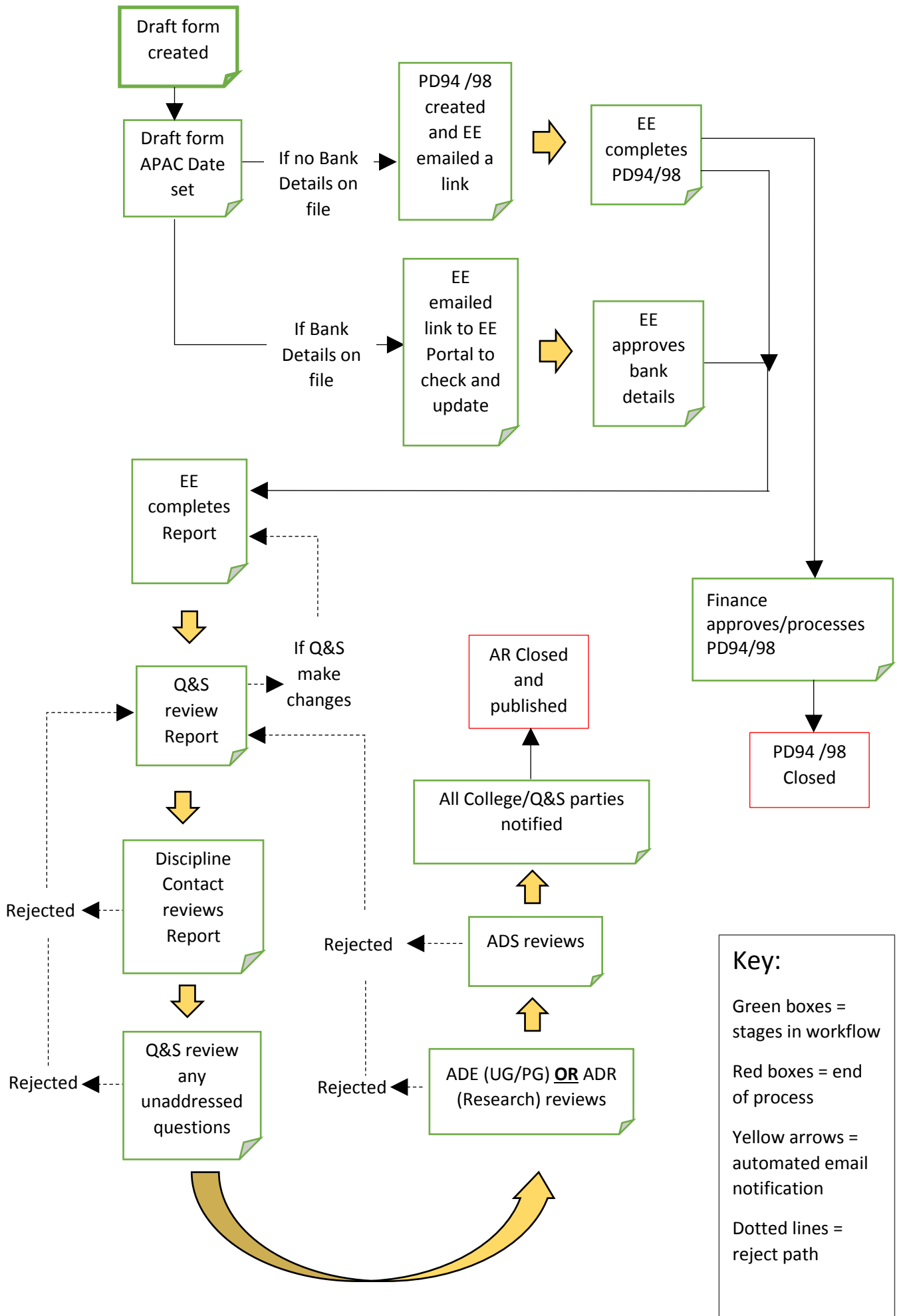
Downstream Processes

When an EE is sent the invite to complete an APAC Report, a background process will trigger a number of actions:

- If the University already holds payment details for the examiner, the examiner will be reminded to check and update them if necessary via the EE Portal, and confirm that they have done so.
- If the University does not hold payment details for the examiner, an appropriate PD form will be automatically generated for them to complete via the EE portal. They will not be able to submit their report until this form has been completed and submitted by them.
- Once the Report process is complete, all interested parties in the College and the Q&S team will be informed by automated email.

Workflow

The complete workflow for an APAC Report is captured in the following flow-chart.





Annual Report Dashboard

Open Reports

With External Examiner	Awaiting Review / Approval	Completed
None	None	None

Annual Report Management

Create a New Annual Report Record

Search For Annual Report Record

Select External Examiner Search

Select College

Select Discipline

Select Award Level

Search For Records

Search Results

Annual Reports

The Dashboard allows users to create new Annual Report records, and also to search for existing records, by EE name, College, Discipline or Award Level.

Searching for APAC Records

Search For Annual Report Record

Select External Examiner Search

Select College

Select Discipline

Select Award Level

Search For Records

Search Results

Annual Reports

EER-459: Dr Connor Harris(k.davies@exeter.ac.uk)
 APAC Date:14/03/2019
 College/Discipline:CEMPS/Civil Engineering (CIE)
 Status: Draft

Search Details

Enter search criteria, or search for EE name, and then choose Search For Records.

Results

Matching records will be displayed in the lower part of the Dashboard.

Creating an APAC Record

Click on Create a New Annual Report Record, and the following screen will display. Items denoted with a red asterisk (*) are mandatory at this stage.

The screenshot shows the 'External Examiner - APAC' form with the following fields and callouts:

- Information Header:** UNIVERSITY OF EXETER, External Examiner - APAC, Current Status - Draft, Assigned To : N/A
- Basic Details:** College/Institution* (CEMPS), Discipline* (Civil Engineering (CIE)), Subjects* (Civils). Callout: **Basic Details** - Enter the details relating to the APAC report – College, Discipline, Examiner, Contacts etc.
- Contacts:** College Contact (Kate Davies), Discipline Contact (Stephen Thornton), External Examiner* (Dr Connor Harris). Each has a 'Search' button.
- Award(s):** Level of award* (Undergraduate), Award(s)* (Please Select, BSc). Callout: **Finance Codes** - Finance Codes are pre-filtered based on your choice of College, Discipline and Award. You must select a code in order to save the record.
- Finance Code*:** Select Finance Code dropdown with options: CEMPS - CLES - All - Exeter - UG, CEMPS - CLES - All - Penryn - PG, etc. Callout: **Date** - The Date for the report may not be known at the point the record is created – it can be added later. **Once added, this date will be the trigger for all downstream processes.**
- Financials:** Standard Fee (£), Amount (£), APAC Date (dd/mm/yyyy), Attended (Select), Authorised Absence (Select).
- Actions:** Save, Cancel buttons. Callout: **Actions** - Save will store the details entered so far, and create an APAC record. Cancel abandons all input and returns the user to the Annual Report Dashboard.

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External Examiner View

The APAC Report is a multi-part form, with each section expanding or collapsing when clicked on. There are nine sections in total, and all have to be completed in order to be able to Submit the report. Many of the required responses are in the form of radio-buttons, but there are also free-text fields that will display on demand, to enable comments to be entered.

APAC Report on screen

External Examiner - Annual Report
Current Status - 2. Awaiting Completion By EE. Assigned To : Davies, Kate

Entry Form Locked By: Davies, Kate @ 14/03/19 14:38

Release Lock

Information
 College :CEMPS
 Discipline :Civil Engineering (CIE)
 External Examiner :Dr Connor Harris(k.davies@exeter.ac.uk)
 Programme/Module Title :Civils.

Section 1: Administration of the Examination Process

Are the programmes current and valid?

Yes	No	Comments
<input type="radio"/>	<input type="radio"/>	

Was the following information adequate for the purpose of external examining:

	Yes	No	Comments
Programme handbook and documentation for students	<input type="radio"/>	<input type="radio"/>	
Programme specifications	<input type="radio"/>	<input type="radio"/>	
Programme aims, objectives and outcomes	<input type="radio"/>	<input type="radio"/>	
Module descriptions	<input type="radio"/>	<input type="radio"/>	
Details of coursework, teaching and assessment methods	<input type="radio"/>	<input type="radio"/>	

The administration of the assessment process was efficient in the following respects:

	Yes	No	Comments
Time available for marking	<input type="radio"/>	<input type="radio"/>	
Operation of the Programme/Discipline Assessment, Progression and Awarding Committee	<input type="radio"/>	<input type="radio"/>	
Quality of data presented to the Programme/Discipline Assessment, Progression and Awarding Committee	<input type="radio"/>	<input type="radio"/>	

Section 1: Administration of the Examination Process
Section 2: Academic Standards
Section 3 - Programme Design, Content and Delivery
Section 4 – Assessment
Section 5 – Assessed Coursework
Section 6 – Dissertations
Section 7 – Aspects of Good Practice
Section 8 – Recommendations
Section 9 – General Comments

Save

Submit

Cancel

Actions

Once all sections have been completed:

Save will store the details entered so far but leave the report at its current stage.

Submit will move the Report to the next stage in the workflow.

Cancel abandons all input and returns the user to the Annual Report Dashboard.

Q&S Review

Once the EE has completed and submitted the report, the Q&S team will review the comments made, to make sure they meet standards for publication. Each section can be expanded by clicking on its title. Note that if the Q&S team make any amendments to the Examiner's comments, the form will automatically be returned to the Examiner in order for them to check the amendments and submit the form again if they agree with the changes.

UNIVERSITY OF EXETER External Examiner - Annual Report
Current Status : 3. Quality and Standards Check. Assigned To : Quality & Standards

Entry Form Locked By: Davies, Kate @ 14/03/19 14:54

Release Lock

Information
College :CEMPS
Discipline :Civil Engineering (CIE)
External Examiner :Dr Connor Harris(k.davies@exeter.ac.uk)
Programme/Module Title :Civils.

Priority : Essential Comments Entered !!

Section 1: Administration of the Examination Process

Are the programmes current and valid?

Yes	No	Comments
<input checked="" type="radio"/>	<input type="radio"/>	

Was the following information adequate for the purpose of external examining:

	Yes	No	Comments
Programme handbook and documentation for students	<input checked="" type="radio"/>	<input type="radio"/>	
Programme specifications	<input checked="" type="radio"/>	<input type="radio"/>	
Programme aims, objectives and outcomes	<input checked="" type="radio"/>	<input type="radio"/>	
Module descriptions	<input checked="" type="radio"/>	<input type="radio"/>	
Details of coursework, teaching and assessment methods	<input checked="" type="radio"/>	<input type="radio"/>	

The administration of the assessment process was efficient in the following respects:

	Yes	No	Comments
Time available for marking	<input checked="" type="radio"/>	<input type="radio"/>	
Operation of the Programme/Discipline Assessment, Progression and Awarding Committee	<input checked="" type="radio"/>	<input type="radio"/>	
Quality of data presented to the Programme/Discipline Assessment, Progression and Awarding Committee	<input checked="" type="radio"/>	<input type="radio"/>	

Section 9 – General Comments

Notes

New note

Ticket Notes [Show Notes](#)

[Save](#) [Review](#) [Reject](#) [Cancel](#)

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Comment Flag

This flag highlights the fact that the Examiner has made comments within the report that must be reviewed before the Report can move to the next stage in the workflow.

Click on each Section Title to view the comments made.

Ticket Notes

Notes can be added to the form. Show/Hide Notes will expand or collapse any notes already entered. Notes are also added automatically to record each stage in the workflow.

Actions

Save – captures the data entered so far but keeps the report in Draft status.
Review – this will move the report to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.
Reject – this will drop the report out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display, for a reason for rejection to be provided.

Discipline Contact (DC) Review

The Discipline Contact will review the report contents, and add their own responses to each of the Examiner's comments. Each section can be expanded by clicking on its title. **Note that by default all report sections are hidden, and must be expanded in order to view the Examiner's comments and add responses.**

The screenshot shows a web interface for reviewing a report. On the left, a blue sidebar lists nine sections: Section 1: Administration of the Examination Process, Section 2: Academic Standards, Section 3 - Programme Design, Content, Section 4 - Assessment, Section 5 - Assessed Coursework, Section 6 - Dissertations, Section 7 - Aspects of Good Practice, Section 8 - Recommendations, and Section 9 - General Comments. A blue arrow points from the 'Making Comments' callout box to Section 3. Below the sidebar is a 'Notes' section with a 'New note' text area and an 'Add Ticket Note' button. A blue arrow points from the 'Ticket Notes' callout box to the 'Add Ticket Note' button. Below the notes are 'Ticket Notes' and 'Show Notes' buttons. At the bottom, there are 'Save', 'Approve', 'Reject', and 'Cancel' buttons. A blue arrow points from the 'Actions' callout box to the 'Save', 'Approve', and 'Reject' buttons. Another blue arrow points from the 'Actions' callout box to the 'Cancel' button. The footer contains copyright information: © 2019 - TQAE Connect : Version:1.0.0.56 and For support email TQAE Connect Support.

Making Comments
Click on each Section Title to view the comments made, and add responses.

Ticket Notes
Notes can be added to the form. Show/Hide Notes will expand or collapse any notes already entered. Notes are also added automatically to record each stage in the workflow.

Actions
Save – captures the data entered so far but keeps the report in Draft status.
Approve – this will move the report to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.
Reject – this will drop the report out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display, for a reason for rejection to be provided.

The Q&S Team will review the Report one final time, and have the opportunity to Reject it if necessary.

The screenshot shows a web interface for a Q&S Review. At the top, there is a blue sidebar with a list of sections: Section 1: Administration of the Examination Process, Section 2: Academic Standards, Section 3 - Programme Design, Co, Section 4 – Assessment, Section 5 – Assessed Coursework, Section 6 – Dissertations, Section 7 – Aspects of Good Practice, Section 8 – Recommendations, and Section 9 – General Comments. A blue arrow points from the 'Viewing Comments' callout box to the list of sections. Below the sidebar is a 'Notes' section with a 'New note' text area and an 'Add Ticket Note' button. A blue arrow points from the 'Ticket Notes' callout box to the 'Add Ticket Note' button. Below the notes section are three buttons: 'Save', 'Approve', and 'Reject'. A blue arrow points from the 'Actions' callout box to the 'Approve' button. Below these buttons is a 'Cancel' button. A blue arrow points from the 'Actions' callout box to the 'Cancel' button. At the bottom left, there is a footer: '© 2019 - TQAE Connect : Version:1.0.0.56' and 'For support email TQAE Connect Support'.

Viewing Comments
Click on each Section Title to view the comments and responses.

Ticket Notes
Notes can be added to the form. Show/Hide Notes will expand or collapse any notes already entered. Notes are also added automatically to record each stage in the workflow.

Actions
Save – captures the data entered so far but keeps the report in Draft status.
Approve – this will move the report to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.
Reject – this will drop the report out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display, for a reason for rejection to be provided.

ADR/E Approval

The ADE/ADR now has the opportunity to review the Report. If the Report concerns a Research programme, it will be passed to the ADR for review/approval; if the Report concerns a taught programme – UG or PG – then it will be passed to the ADE for review/approval.

The screenshot displays a web interface for report approval. At the top, a blue sidebar lists nine sections: Section 1: Administration of the Examination Process, Section 2: Academic Standards, Section 3 - Programme Design, C, Section 4 – Assessment, Section 5 – Assessed Coursework, Section 6 – Dissertations, Section 7 – Aspects of Good Practice, Section 8 – Recommendations, and Section 9 – General Comments. A callout box titled 'Viewing Comments' points to this list, stating: 'Click on each Section Title to view the comments and responses.'

Below the sidebar is a 'Notes' section with a 'New note' text area and an 'Add Ticket Note' button. A callout box titled 'Ticket Notes' points to this area, stating: 'Notes can be added to the form. Show/Hide Notes will expand or collapse any notes already entered. Notes are also added automatically to record each stage in the workflow.'

At the bottom of the interface are four buttons: 'Save', 'Approve', 'Reject', and 'Cancel'. A callout box titled 'Actions' points to these buttons and provides the following definitions: **Save** – captures the data entered so far but keeps the report in Draft status. **Approve** – this will move the report to the next stage in the process. **Cancel** – abandons all input and exits to the Dashboard. **Reject** – this will drop the report out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display, for a reason for rejection to be provided.

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ADS Approval

The ADS now has the opportunity to review the Report, and either Approve or Reject. **Note that this is the final opportunity to reject the Report.**

The screenshot shows a web interface for ADS Approval. At the top, a blue sidebar lists sections 1 through 9. Below this is a 'Notes' section with a 'New note' text area and an 'Add Ticket Note' button. Further down are 'Ticket Notes' with a 'Show Notes' button, and a row of 'Save', 'Approve', and 'Reject' buttons. At the bottom left, there is a 'Cancel' button. Three callout boxes with arrows point to specific elements: 'Viewing Comments' points to the sidebar sections, 'Ticket Notes' points to the 'Add Ticket Note' button, and 'Actions' points to the 'Save', 'Approve', and 'Reject' buttons.

Viewing Comments
Click on each Section Title to view the comments and responses.

Ticket Notes
Notes can be added to the form. Show/Hide Notes will expand or collapse any notes already entered. Notes are also added automatically to record each stage in the workflow.

Actions
Save – captures the data entered so far but keeps the report in Draft status.
Approve – this will move the report to the next stage in the process.
Cancel – abandons all input and exits to the Dashboard.
Reject – this will drop the report out of the workflow and reset it to the start of the process – i.e., return it to Q&S. A new text box will display, for a reason for rejection to be provided.

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