

## 4. Use of e-portfolios in assessment

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## 4.1 Introduction

Using portfolios of evidence has long been part of the traditional assessment process for a range of qualifications. The use of e-portfolios in assessment has now also been adopted by many awarding bodies and accepted by the qualifications regulators. In the context of this document, an e-portfolio is defined as an electronic version of a ‘traditional’ evidence portfolio, not a wider learning portfolio. It consists of a system and process that enables secure, computer-based verification and assessment of evidence.

This guide is intended to assist staff in centres to:

- ◆ understand the key issues involved in using e-portfolios for assessment
- ◆ put in place appropriate systems and supporting processes
- ◆ ensure that people have, or acquire, the requisite skills to manage and use systems and processes efficiently and effectively

‘Awarding bodies are moving quickly towards acceptance of electronic scripts. Paper-based systems will simply not be sufficiently scaleable, and e-portfolios will therefore be needed to support the formal qualifications system.’

(Source: British Educational Communications and Technology Agency (Becta) ‘E-portfolios — Definitions and directions paper’)

**Terminology note:** In this section of the guide, the word ‘learner’ is used to define the person developing the e-portfolio for submission to an awarding body, although it is recognised that at some point in the process, the learner might equally be described as a ‘candidate’.

The term ‘teacher’ has also been used throughout but is intended to encompass other terms such as ‘tutor’ or ‘trainer’.

As shown in the following table (from Becta’s ‘E-portfolios — Definitions and directions paper’) e-portfolios can be used in a variety of ways. This guide will concentrate on the final assessment element of e-portfolios for qualification and evidence purposes, and will not include analysis of other aspects of e-portfolios.

A more detailed description of the different types of e-portfolios can be found in annex A7.

## E-portfolio modes of usage

<p><b>Assessment</b></p> <p>For assessing or matching against specified criteria as in a qualification or job specification, for example, evidence for a key skill or NVQ</p>	<p><b>Transition</b></p> <p>For providing evidence and records at transition points for transfer of pupil information from, for example, primary to secondary school</p>
<p><b>Presentation</b></p> <p>For presenting information or achievements, often to particular audiences, for example, selected design drawings to show to a client or prospective employer</p>	<p><b>Learning</b></p> <p>For personal and group information, often related to learning, reflection and self assessment, a record of learning goals, for example, achievements towards them and teacher feedback</p>

(Source: Becta, 2006)

When used for assessment purposes:

- ◆ the information must be in a format capable of validation
- ◆ there must be a secure area to hold the evidence, to ensure its validity
- ◆ it must form part of an auditable trail (conformance to a defined process will aid this objective)
- ◆ evidence can be added over time to aid successful completion, provided that a valid, auditable process for this is adhered to

## 4.2 Scope

The scope of what can be submitted via an e-portfolio for assessment purposes may be anything from a small part of the evidence for a single unit, up to the complete evidence for a whole qualification, depending on the specific awarding body, sector or subject. In this sense, it reflects a ‘blended assessment’ approach similar to the now established concept of ‘blended learning’.

The generic skills required for using e-portfolios for assessment will be basically the same regardless of which e-portfolio system is in use, although the intricacies of working with different e-portfolio products may vary. These generic skills are covered in more detail in section 2, ‘Roles and responsibilities’.

As e-portfolios perform the same function as paper-based portfolios, the assumption is made within these guidelines that centres are already familiar with the use of portfolios within the overall assessment process.

### A typical e-portfolio

E-portfolio systems range from a secure file storage function within a stand-alone system, to more sophisticated web-based products, or they may be part of a VLE. Centres may also choose to develop their own system. Whichever approach is selected, centres looking at introducing e-portfolios into their offer should consider how well the system supports the assessment process. A typical e-portfolio may include assessment evidence in the following types of format:

- ◆ text
- ◆ documents (for example, Word, PowerPoint, PDF)
- ◆ sound
- ◆ images/pictures
- ◆ multimedia, such as video

Awarding bodies have a part to play in this process as well. They should make centres aware of any specific technical requirements or constraints, such as file size, that may affect how evidence is provided. For example, it is perfectly acceptable (and often desirable) to provide compressed video clips, so that the capability of the system to store and transport evidence is not compromised.

## 4.3 Preparing to introduce e-portfolios

### Drivers

There are a number of reasons why a centre may be considering introducing e-portfolios.

- ◆ Increasing use of e-assessment for both formative (informal, supporting learning) and summative (formal, often external) assessment is making e-portfolios more appropriate.
- ◆ Qualifications are already offered that provide an e-portfolio system for learners to upload and share their evidence with assessors and tutors.
- ◆ There is increasing use of e-portfolios for learners with practical experience who may not go into the learning centre but are assessed in their workplace (remote, work-based learners).

### Capacity to manage and skills required

While technical functionality is obviously an important aspect of choosing an e-portfolio system (and is covered in detail later in this section), it is equally important to consider the human aspect of using e-portfolios.

Once a centre has decided it wishes to offer learners access to e-portfolios, as part of the assessment offer, and has identified which e-portfolio system meets its requirements and which choice of qualifications to offer in this way, it also needs to determine whether it has the capacity currently to manage the process, and has access to appropriate staff skills.

For instance, depending on the types of qualification the centre is involved with, a number of different people may need to be familiar with, and work effectively with the e-portfolio and its associated processes, for example:

- ◆ learner
- ◆ teacher
- ◆ other support staff
- ◆ assessors and verifiers
- ◆ workplace supervisors/managers

This introduces a different perspective on requirements, based on the process of e-assessment as much as the product itself; it is essential that the e-portfolio system supports the way the centre works, and that staff have the appropriate skills to manage it effectively.

A summary of the skills and knowledge required to use e-portfolios effectively for assessment purposes can be found in section 2, 'Roles and responsibilities'.

- ◆ The staffing requirements checklist in annex A1 can be used (in conjunction with the functionality checklist in annex A6) to ensure that the right expertise is identified (or developed) within the organisation, including ensuring that people are aware of the activities they need to support, and have sufficient knowledge and skills to perform the associated tasks effectively.
- ◆ These checklists can also be used to identify activities that will involve specific centre staff and to highlight areas for improvement, either in relation to understanding the activity or familiarity with how the e-portfolio works. This can be used as the basis for identifying training needs for staff, or workshops for learners.

## 4.4 Benefits of using e-portfolios in assessment

Although it is possible to achieve the assessment objectives for most qualifications without the use of an e-portfolio, there are benefits in using electronic means to collect and monitor a range of different types of information. This enables the information to be held in one place, and to be accessed, edited (where appropriate) and assessed more easily than disparate items that are not held electronically.

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Some of the advantages of an e-portfolio over a paper-based version include:

- ◆ tracking and identifying skills, knowledge and evidence gaps that require further work
- ◆ storing (and/or sign-posting) all the evidence in one place, which makes for ease of access, and reduces the chances of loss or damage
- ◆ the capability to access the e-portfolio from any networked computer, so the user has no need to carry anything around
- ◆ sharing the portfolio on a named basis, which enables learners to allow tutors and assessors to review their evidence without the need to photocopy documents — thus saving time and ensuring confidentiality
- ◆ transferring e-portfolio content to other systems and organisations
- ◆ supporting accessibility at all levels, from reducing the amount of paperwork or easing the development of an audit trail, to enabling the preferences and needs of all users
- ◆ supporting individual and group-based learning and assessment
- ◆ supporting multiple languages and cultures
- ◆ scalability (the capacity to deal efficiently with higher volumes of evidence and learners)
- ◆ the potential to include new evidence types, such as video, that would not be possible without an electronically-based portfolio

(Source: article by Julian Cook, LTSS learning adviser and IMS Global Learning Consortium)

Top ten benefits achieved with e-portfolios (as perceived by 95 City & Guilds centres):

1. improved assessment turnaround time
2. improved student motivation
3. improved consistency of quality assessment
4. improved quality standards
5. more transparent internal communication
6. reduced trainer workload
7. enhanced IT skills of learners/staff
8. improved staff morale
9. Improved security/confidentiality
10. saved money

There are also benefits for external verifiers (EVs). For example, City & Guilds views e-portfolios as giving EVs the potential to assess the readiness of centres and candidates for visits remotely.

‘E-portfolios facilitate more face-to-face, assessment-focused time during centre visits rather than discovering that candidates aren’t ready to be assessed and looking for paperwork etc. E-portfolios do not completely replace the face-to-face contact that centres have with EVs. By providing a communication medium between centres, candidates and EVs, remote assessment can reduce the need for as many centre visits and allow visits to focus on centre enquiries and assessment.’

(Source: City & Guilds)

### Assisting the assessment process

The regulatory authorities advocate three main approaches to collecting evidence for N/SVQ assessment:

- ◆ an assessor-led approach
- ◆ a candidate-led approach
- ◆ a combination of the two

#### Collecting evidence (regulatory authorities)

‘In an assessor-led approach the assessor could take some responsibility for collecting and structuring evidence, and collect evidence through observation of performance supplemented by questioning. The candidate-led approach may be particularly appropriate if it is difficult for the assessor to carry out direct observation.’

Where e-portfolios are used, much of the assessment can be conducted remotely, which can be of real assistance to the process.

## 4.5 Key issues related to e-portfolios

E-portfolio technology, particularly for assessment purposes, is still evolving, and this is why the approach at this stage is deliberately to guide rather than to constrain usage. Issues such as those summarised below continue to be debated, and solutions will be sought and developed over time. This is seen as the only practical way in which to enable evolution of the technology, encourage the participation of interested parties in developing effective practice, and share both effective practice and lessons learned.

Although awarding bodies are not currently stipulating which e-portfolio a centre uses, centres should check that the e-portfolio system they intend to select meets with awarding body approval.

### Strategic issues

It is important that the introduction of e-portfolio assessment is seen by the organisation as a strategic move. There are a number of different reasons why the use of e-portfolios may be under consideration. Assessment may not be the primary focus at the time of introduction unless some debate takes place to ensure that an overall understanding of what is required from such a system is shared across different subject areas and disciplines and at all levels of management.

Although there are many reasons why this is important, and some of these are mentioned elsewhere in this guide, there are several major implications of not achieving general agreement (or at least an awareness of when and why an e-portfolio product is being considered for selection).

- ◆ It could result in more than one e-portfolio system being brought in, meaning that some users may be required both to access and effectively use more than one system (including external assessors).
- ◆ It could be seen as a simple option to introduce an e-portfolio system that integrates with the existing management information system (MIS) or VLE, but this does not necessarily mean that it is the most appropriate e-portfolio for assessment purposes.
- ◆ Some organisations are going down the route of developing an in-house e-portfolio system. In these cases, it is important that due consideration is given to the hidden costs of using open source and in-house solutions — not least to the need to ensure that specialist technical knowledge is available to the organisation, to provide sufficient and effective support to both the system itself, and to its users.

### Staff commitment and training

In the experience of centres who have already introduced e-portfolios, a key success factor has been the 'buy-in' of staff, as the process will involve them in developing new skills and practices, as well as in supporting learners to use the technology effectively.

Staff commitment is an issue for awarding bodies as well. The success of using e-portfolios within the assessment process is partly dependent on assessors, verifiers and others becoming proficient in working with the different e-portfolio systems in use at awarding body centres.

- ◆ Part of the process of gaining commitment and involvement from staff will depend on there being sufficient and appropriate training for them in the use and inclusion of e-portfolios in the assessment process, particularly as there is still a tendency for issues to arise around the use of technology in general for some staff.

- ◆ Specific training will need to be provided for staff (including teachers, assessors and exams staff) newly involved in delivering courses where e-portfolios form part of the process of assessment. This training may be supplied in part by the chosen supplier of the e-portfolio system. However, it is also useful to look at how e-portfolios will sit within and work with the centre's existing assessment processes and to involve staff in related development activities.
- ◆ The staffing requirements checklist in annex A1 can be used to identify the most appropriate people to perform different roles, and where there are gaps in capacity or skills. It may be possible for centres to have access to expertise in certain areas (such as technical or learner support) rather than having all skills permanently available in the centre.
- ◆ It is equally important to ensure that learners understand the part that e-portfolios will play in providing evidence towards a unit or qualification, and acquire the skills to use the e-portfolio effectively. It is essential to remember that learners should be neither advantaged nor disadvantaged by the use of technology. To achieve this, any staff supporting learners need to be familiar with the particular system chosen, together with any specific requirements of the appropriate awarding body or the qualification involved, and any technical requirements or constraints.

### Ownership of the e-portfolio and its content

The issue of ownership of an e-portfolio is important. There is a need to ensure that the interests of the learner are maintained (including the issues of data protection, security, integrity and back-up), while recognising that some of the content of the e-portfolio needs, on occasions, to be accessed by others involved in the assessment process.

To clarify, the learner is the owner of the e-portfolio and can determine the access rights of others to its contents. However, as part of the arrangement for e-portfolio content to be used as evidence towards a unit or award, learners must agree that awarding bodies and assessors can access the evidence area of the e-portfolio.

Ownership of the e-portfolio is linked to access rights and security.

- ◆ It must be possible to restrict and enable access appropriately.
- ◆ Any content flagged or submitted for formal assessment must remain unchanged.

### Technology issues

There are a number of issues related to the current development of e-portfolio technology that continue to be addressed, including:

- ◆ the capability of the system to allow learners to transfer their portfolios between different e-portfolio products and systems
- ◆ ensuring that the system is secure and that access to its contents, including any materials signposted for assessment that are held remotely, can be controlled by the learner
- ◆ ensuring that the system enables those who are authorised to access it to do so in line with the requirements of the qualification
- ◆ enabling users to modify the way that information is displayed/presented, where they have specific accessibility needs
- ◆ ensuring that the material is stored in such a way that it can be accessed and/or downloaded using a standard broadband connection, or remotely if required
- ◆ establishing and maintaining the capability of centres to access the data for management information purposes
- ◆ ensuring that there is sufficient storage and back-up capability to enable data to be held for the future
- ◆ future-proofing for different access devices, such as PDAs and mobiles, as well as PCs

Organisations such as Becta and JISC are considering these issues at a regional and national level, and are working with suppliers to set standards and targets.

It is equally important that centres becoming involved with e-portfolios are aware of the requirement to work towards interoperable systems and transferable content, so that they can support this development through their selection of e-portfolio systems. They should ask pertinent questions of e-portfolio suppliers to ensure that their approach is compliant with national thinking and does not impede progress towards the long-term goal of interoperability.

**Note:** The checklist in annex A6, and referred to in sections 4.6 and 4.7, can be used to facilitate this process, and can help to present a consistent approach when dealing with e-portfolio suppliers.

Centres are encouraged to keep up to date on progress in this area (the JISC Regional Support Centres should be a good starting point for information). The main technical issues that are likely to affect centres are:

- ◆ connectivity
- ◆ hosting

- ◆ access devices
- ◆ access, authentication and security
- ◆ accessibility, including navigation
- ◆ technical standards and interoperability
- ◆ security
- ◆ data transfer

## 4.6 Selecting an e-portfolio system

### Overall principles

#### **Aims of an e-portfolio**

‘[The e-portfolio system] should, where appropriate:

1. Be accessible by the learner, and elements to their practitioners/mentors anytime, anywhere.
2. Be supported by... awarding bodies and statutory authorities (for example QCA).’

(Source: Becta ‘E-portfolios — Definitions and directions paper’)

E-portfolios are still at a relatively early stage of development, and the primary focus for suppliers may be on products and features. However, there is a growing range of e-portfolio systems on the market, and it is important to know how to identify the most appropriate product for a centre’s assessment needs.

There is usually no compulsion from awarding bodies for a centre to use a single specific system for supporting assessment through e-portfolios. Choices about how to support the use of e-portfolios are generally left to the centre, based on its own requirements. These may include e-portfolio usage (for purposes other than assessment) outside the scope of this guide.

This situation may evolve over time, with awarding bodies specifying the use of a particular e-portfolio product for certain qualifications. This will make features such as interoperability all the more critical when a centre is selecting or developing its e-portfolio system. As mentioned earlier, this could also lead to centres needing to support more than one system, and users having to become familiar with their use. Therefore, this is an issue that should continue to be debated.

Awarding bodies may have selection criteria that the e-portfolio is required to meet, and will need to approve the choice made. The qualifications regulators are supporting the development of a set of protocols to cover general and vocational qualifications. The points covered in these guidelines are in line with the protocols.

### Initial checks

For centres that are part of a larger organisation or institution, it is advisable to check whether there is an e-portfolio system already in use (as part of a VLE, for example). If so, centres should determine:

- ◆ whether it contains a suitable assessment component (see ‘Detailed functional requirements and issues’ later in this section)
- ◆ whether it meets the protocols being developed and has the approval of relevant awarding bodies

Equally, if there is a requirement elsewhere within the organisation to introduce e-portfolios for a purpose such as formative assessment or personal development, it makes sense to work collaboratively to ensure that the product is suitable (and approved) for formal assessment purposes as well.

This will help to ensure that future development of e-portfolio products builds towards a point where learners can be offered a consistent entitlement wherever they are based, supporting the assessment process effectively and efficiently.

The possibility, in future, of the development of common centre approval by awarding bodies may also mean recognition for centres offering e-portfolio assessment, through a single mutually-agreed process of approval. In this context the selection and development of e-portfolios for assessment needs to be based on these emerging shared protocols.

Potential issues in selecting an e-portfolio system:

- ◆ There may be a temptation to take on the same supplier as is already in place for the organisation’s MIS/VLE, and this should only be considered provided the system is suitable for assessment purposes.
- ◆ It is important to include both senior and middle managers in the selection process/decision, as there are likely to be different perspectives involved, and all should be taken into consideration for an important purchase that may have far-reaching implications.
- ◆ Ideally there should be centre- or organisation-wide agreement. This avoids the risk of taking on more than one e-portfolio system, which could result in learners and assessors/verifiers having to become familiar with a number of different systems and processes.

## Involving staff in the decision-making process

A primary requirement of any system is that it should satisfy users' needs first and foremost. However, it can help to involve technical and other staff in the process of selection from an early stage, both to ensure that a usable and appropriate system is put in place and to develop a sense of ownership of the system and process.

It is also important to manage expectations of staff around the capabilities and constraints involved in using e-portfolios and associated technologies.

## 4.7 Functionality and fitness for purpose

There are a number of functional requirements that any e-portfolio under consideration should be able to meet if it is to be used as part of formal assessment towards a recognised unit or qualification. It is also worth comparing the methodologies of different systems, as some may be more user-friendly or closely aligned with the centre's way of working than others.

### Key functional requirements — summary

Desirable features and functionality that organisations look for when selecting an e-portfolio system will vary according to their requirements. However, some key attributes are reasonably generic, and should be taken into consideration during the selection process.

A centre's functional requirements for supporting assessment through e-portfolios should be discussed with any prospective e-portfolio supplier, and can be summarised as follows (based on information from a Centre for Reading Achievement (CRA) report commissioned by Becta):

- ◆ The system should meet the approval of relevant awarding bodies, and any protocols that are developed for the acceptance of e-portfolios.
- ◆ Key users (such as learners, teachers, assessors, and verifiers) should be able to readily access and use those parts of the e-portfolio necessary for the performance of their role (with appropriate 'views' of the data), and remotely if necessary.
- ◆ The system should support secure use and the authentication of user information. It should be possible to limit or control access in a variety of ways, from complete read/write access to all areas, to complete prevention of access.
- ◆ It should be easy to use (for learners, assessors, verifiers and others), including an appropriate level of accessibility for learners with special requirements. It should provide a user-friendly approach to collating a portfolio of evidence, which will need to contain definable work in progress and evidence ready for assessment.

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- ◆ It should enable efficient transfer of data to other systems (for example, for registration of learners).
- ◆ It should enable good visual presentation of evidence.
- ◆ It should be capable of future interoperability/integration/portability (the supplier should be aware of the need to work towards interoperability of e-learning and e-assessment systems), for example:
  - between e-portfolio and e-learning environments
  - within one awarding body and across awarding bodies
  - with the learner achievement record (LAR), currently under development as part of the QCF, and other developments underway to recognise wider achievement (for example within the Curriculum for Excellence programme in Scotland)
- ◆ A suitable range of content formats should be supported, including multimedia.
- ◆ It should have bandwidth suitable to cope with the amount and type of traffic anticipated, and support both broadband and dial-up access, as users will not necessarily have broadband access under all circumstances. In addition, it should not require remote users such as assessors and verifiers to have specialist software in order to access the system.
- ◆ It should have commercial support and dedicated training for users (not just technical/navigation elements).

If a system falls short in any of these areas, it is worth checking with the relevant awarding body (or bodies) on how critical this area is to gaining approval for the system's use in e-assessment.

A more detailed look at these requirements and issues is provided below, and a checklist to assist the process of selection can be found in annex A6.

### Detailed functional requirements and issues

This section looks in more detail at the main requirements and issues involved in selecting an e-portfolio, and the notes in this section match the accompanying checklist in annex A6.

The requirements (listed on the checklist and expanded here) can be used to document comparisons between different e-portfolio systems, and to help to determine whether they are appropriate for use as part of the assessment process.

The section is based on information used by organisations such as awarding bodies in determining whether a particular system is suitable, and looks at a wide range of functional criteria.

The checklist includes a 'priority' column, so that centres can document and refer to their priorities when checking the functionality of different systems.

### **1 Acceptability/suitability of system**

It is important to check that the system you are considering is approved by the awarding body/bodies you wish to work with. Equally, it is worth looking at any existing e-portfolio system currently in use elsewhere in the organisation, to determine whether it is suitable for e-assessment purposes.

### **2 Scope**

If the centre (or wider organisation) wishes to use the e-portfolio for other purposes (for example, personal development or diagnostic and/or formative assessment), it is important to establish in advance whether and how the system caters for these additional uses.

### **3 Accessibility**

The e-portfolio needs to be easily accessible by appropriate staff, learners, assessors and verifiers, whether at the centre or remotely. Awarding bodies will also need to access the system for compliance checks and in the case of queries or complaints.

The system also needs to support any access devices appropriate to the centre's users (learners or staff). Other aspects of accessibility should be considered, such as how simple the process is for transferring documents and/or evidence between relevant users.

Authorised users should also be able to access groups, individuals or learners on specific programmes, for the purpose of managing and/or monitoring progress.

### **4 Monitoring learner progress**

It can be helpful to determine who needs to monitor learners' progress, and how easy this is to do on each e-portfolio system you consider. For instance, apart from being user-friendly and efficient, there should be the facility to observe or be notified when a learner has completed a particular area, and for designated users to view comments from internal and external assessors. It should be possible to set appropriate access rights (for example, read-only) for all users.

### **5 Cross-referencing**

A number of qualifications require evidence to be cross-referenced, so it is important to establish whether this is possible, and how intuitive and usable the process is.

### **6 Reports**

Centres need to establish how flexible and easy it is to use the e-portfolio system to generate and customise reports, so that they suit the needs of the range of users who will require them.

### **7 Audit trails, security and authentication**

There should be a clear assessment tracking system that includes a detailed audit trail, and it should be possible to control usage in a range of ways, for example, security passwords or IDs, read/write access rights and electronic storage of sample signatures or handwriting.

Access to the internet should be secure and encrypted, with access rights ensuring that only authorised users have access to specific areas of content, particularly in relation to assessment records.

Most critically, it must be possible to 'lock' completed units so that it is impossible to change evidence after it has been submitted for assessment. Data protection requirements must also be met.

An associated security issue is the kind of back-up facility provided in the event of a system failure.

### **8 Ease of use and quality of presentation**

Some of the issues in this section are subjective, but overall the system should be both user-friendly and reasonably uncomplicated to use, otherwise it is likely to become an unpopular medium. There are a number of points that can be looked at and discussed that will help to establish how intuitive the process will be for staff and learners who may not be technically advanced.

Things to consider are:

- ◆ how easy it is to store evidence in a variety of formats, such as text, sound, images (pictures and graphics) and video
- ◆ whether the system provides good visual presentation of evidence
- ◆ whether the system uses standardised templates, and if so, whether these seem to be simple and work well
- ◆ what facility there is for customising the system for use by learners with special requirements
- ◆ whether it is possible to make links to other documents (such as centre policies and procedures, or qualification documentation) that are stored on other systems
- ◆ whether e-portfolio content can be transferred to a portable memory device if necessary (for example, CD, DVD and USB key)

## **9 Internal and external assessment**

Assessment of learner evidence is clearly an important issue. Access to appropriate content and to learners should be a reliable, secure and user-friendly process, to ensure that electronic assessment is seen as beneficial and appropriate to these users.

Accurate, auditable records of assessment must be maintained, such that for each assessment decision the following information is needed:

- ◆ Who was assessed?
- ◆ Who conducted the assessment?
- ◆ What was assessed?
- ◆ When was it assessed?
- ◆ What was the assessment decision?
- ◆ Where is the evidence located?

This information should be endorsed with the candidate's and assessor's signatures and dates. Records of assessment must be audited by the external verifier and must be held by the centre until the awarding body authorises their release.

It is therefore important that the e-portfolio system can support such a process.

## **10 Communication/links**

It is also useful to establish how user-friendly and widespread the communications aspect of the e-portfolio is. Users will often wish (or need) to use the centre's e-mail system, have webmail accounts or link to the centre's MIS and/or VLE, and will find it cumbersome to have to access all these systems separately.

## **11 Archiving and retention**

All material should be backed up, and the e-portfolio system must meet a number of regulatory requirements around storage and archiving e-portfolio content used for assessment purposes, such as how long e-portfolios must be kept, and what is done to safeguard them against modification. It is worth establishing with the awarding body what their requirements are in this area. It is also worth checking that the content can be retrieved by the learner at a later date, or transferred to an alternative system — for instance, if the learner moves to a new centre — and if so, the process for this.

## **12 Induction/training/support**

It is important to determine to what extent the e-portfolio supplier (whether the product is bought in or developed internally) would provide training for staff; whether this would extend to awarding body assessors if required; and

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any additional cost of such training. Some suppliers also offer guidance in using their system effectively as part of the assessment process, rather than limiting it to navigational and basic usage of the system.

Allied to this, it is important to identify the following:

- ◆ what help is available on an on-going basis
- ◆ what the response time is, and how support is provided (for example online, by e-mail or telephone support)
- ◆ whether there is the potential for technical support to be supplied in-centre if necessary

### **13 Reference sites**

It can be invaluable to see the e-portfolio in use in other organisations, and to talk to staff using it, particularly in centres that are similar in size, scope and organisational method. Suppliers should be willing to provide contact with such reference sites.