

## e-Portfolios - functionality checklist

Desirable features for e-portfolios	Priority L/M/H	Yes/No/NA	Comments
<b>1. Acceptability/suitability of system</b>			
Has the product you are considering been approved by the awarding body/bodies you wish to work with?			
Is there an e-portfolio system currently in use elsewhere in your organisation? If yes, is it suitable for your e-assessment purposes? If no, what are your reasons for rejecting it?			
<b>2. Scope</b>			
If you wish to use the e-portfolio for other purposes (for example, personal development, diagnostic and/or formative assessment), does the product cater for these additional uses?			
<b>3. Accessibility</b>			
Is the e-portfolio easily accessible by learners, teachers, assessors and moderators?			
Can the product be accessed from locations remote from the centre? Can documents/evidence be transferred simply between the relevant users?			
Is it clear who 'owns' the portfolio?			
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<b>4. Monitoring learner progress</b>			
Who needs to be able to monitor your candidates' progress? Can a candidate's progress be monitored easily?			
Is it possible to conduct initial assessment checks online?			

Can action planning be conducted online with learners?			
Does the system 'flag' when work is received for review?			
Can additional courses be selected for learners?			
Can comments from internal and external assessors be viewed? If so, by whom? Can these comments be protected from amendment?			
<b>5. Cross-referencing</b>			
Is it simple to cross-reference evidence, if this is a prerequisite of the qualifications you are working with?			
If there is a facility for cross-referencing against criteria: <ul style="list-style-type: none"> <li>• How easy is this to do?</li> <li>• Who can do it?</li> </ul>			
Can one evidence file (with more than one piece of evidence) be cross-referenced to more than one assessment criterion?			
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<b>6. Reports</b>			
Is there real time reporting from workplace to centre back-end systems?			
Can learner reporting systems be accessed off-site?			
Can the system report on credits and qualification achievements?			
Can the centre customise reports?			
<b>6.1 Generic reports</b>			
Can the system generate the following generic reports? For example: <ul style="list-style-type: none"> <li>• size of assessor's case-load</li> <li>• start and end dates for candidates</li> </ul>			

<ul style="list-style-type: none"> <li>• time taken to complete unit(s) or qualification (in days)</li> <li>• forms of assessment used</li> <li>• number of candidate registrations per assessor</li> <li>• numbers in receipt of credit for completed units</li> <li>• gender/diversity/equality analysis</li> <li>• report by age of candidates</li> <li>• analysis of candidates against national benchmarks.</li> </ul>			
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<b>6.2 Assessor reports</b>			
<p>Can the system generate the following assessor reports (related to individual learner)? For example:</p> <ul style="list-style-type: none"> <li>• contact prior to visit</li> <li>• what has happened on visit</li> <li>• learner progress</li> <li>• whether assessment has taken place</li> <li>• last time learner seen (attendance)</li> <li>• next scheduled visit</li> <li>• contact schedule overview</li> <li>• flag when learner approaching four weeks between contacts.</li> </ul>			
<b>6.3 Employer reports</b>			
<p>Can the system generate the following employer reports? For example:</p> <ul style="list-style-type: none"> <li>• course target plans</li> <li>• candidate progress</li> <li>• percentage completed in time.</li> </ul>			
<b>7. Audit trails, security and authentication</b>			
Does the product provide an audit trail?			
If so, who can access the audit trail?			
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Are unique security passwords/IDs provided for each level of user?			
Are read-only rights provided?			
Is there provision to show only qualified assessor or internal verifier involvement?			
Is it possible to electronically store sample signatures/handwriting?			

Is it possible to 'lock' completed units?			
Does the product provide a back-up facility in the event of system failure?			
8. Ease of use and quality of presentation			
Is it easy to store: <ul style="list-style-type: none"> <li>• text</li> <li>• sound</li> <li>• scanned images/pictures</li> <li>• video evidence</li> </ul>			
Does the product provide good visual presentation of evidence?			
Does the product use standardised templates? Are they user friendly?			

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Does the product permit customisation for candidates with special requirements?			
Can the system present different 'views' of information dependent on role (for example, learner, assessor or moderator)?			
Does the product provide links to other documents/areas, for example, centre policies and procedures and qualification documentation?			
Can both staff and learners upload evidence?			
Can CDs be generated from portfolio content?			
<b>9. Internal and external assessment</b>			
Are networked standards available to assessors, to enable easy assignment to students on- and off-site?			
Are assessors automatically notified when evidence is available for assessment?			
Can internal/external assessors have access online at any time, with a record of when this takes place?			
Can assessor access be 'managed', and recorded when it takes place?			
Can comments from assessors be viewed, with control over who views what data?			
Can comments be protected from amendment?			
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<b>10. Communications links</b>			
Can the e-portfolio be integrated with the centre's email system?			
Can learners have webmail accounts?			
Can the system link with the centre's VLE or			

learning management system?			
Are email contacts and distribution lists for course students produced automatically?			
Can the system be accessed remotely by designated staff, learners, employers and so on?			
Is there the facility for staff to use the system offline for assessment or verification purposes?			
Can PDAs be used for off-site assessment purposes?			
<b>11. Archiving and retention</b>			
Does the supplier meet the regulatory retention requirements?			
Are archived documents safeguarded against modification?			
Can a learner access content at a later date/transfer it to another e-portfolio system or location?			
<b>12. Induction/training/support</b>			
Does the supplier provide induction/training programmes for candidates and centre staff in the use of the e-portfolio product?			
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Would the supplier be prepared to provide training for awarding body assessors in the operation of the e-portfolio product?			
What help provision is there? For example: <ul style="list-style-type: none"> <li>• online (differentiated by user role and rights, and contextualised)</li> <li>• email response</li> <li>• telephone support</li> <li>• in-centre technical support (including any geographical limitations).</li> </ul>			
How many people are available to provide this support?			
What are the response times? (Must have service level agreements.)			

<b>13. Reference sites</b>			
Is the e-portfolio product currently being successfully used by learners, teachers, assessors and moderators in other organisations? If so, is the supplier able/willing to provide reference sites for you to contact?			
<b>14. Other</b>			