External Assessors – a quick guide
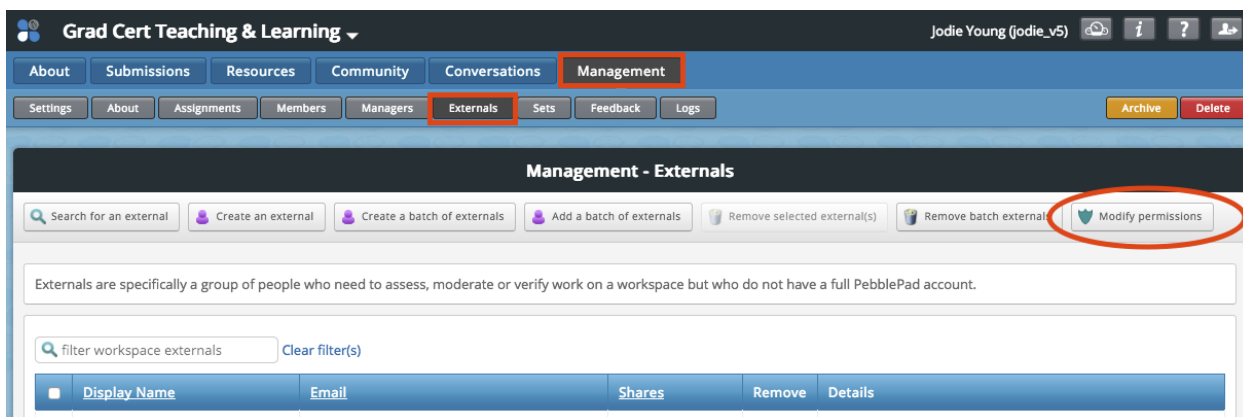
Audience: ATLAS Managers

Externals is the term used to describe people from outside of the host organisation who are engaged in assessing or validating the assets or assessment processes evidenced on a workspace. Externals can be given access to workspaces without having a full Pebble+ account. They can only login to the workspaces they have permissions on (these permissions are set by the workspace manager) and cannot access any other parts of the system. Expiry dates can be added to prevent Externals accessing the workspace beyond a specified point in time.

Note: External accounts can only be created for people with non-institutional email addresses.

Role and Permissions

You can view the default permissions for this role on the workspace by clicking on the **Modify permissions** button on the **Management – Externals** page. Default permissions are inherited from the Region the workspace is in, which inherits them in turn from the Organisation. For this reason defaults could be different on different workspaces – hence it is important to check the permissions before an assessment process begins

It is important to note that Externals do not have the same default assessment permissions as Tutors. For example, if you wish Externals to be able to complete assessor fields within an asset you may need to modify the permissions to enable them to do so.

If you have modified permissions you can return to the defaults at any time by clicking the **Reset** button in each section, or the **Reset all permissions** button at the top right of the page.

There are also certain permissions that Externals do not have, such as the ability to Verify pages.

Enabling Sets on the workspace ensures that Externals view only the work of students that have been allocated to them.

Options for external assessment

There are various ways that Externals can be involved in assessing student work. The method you choose will largely depend on your security and administrative requirements. The following diagram identifies some of these needs and the corresponding processes.
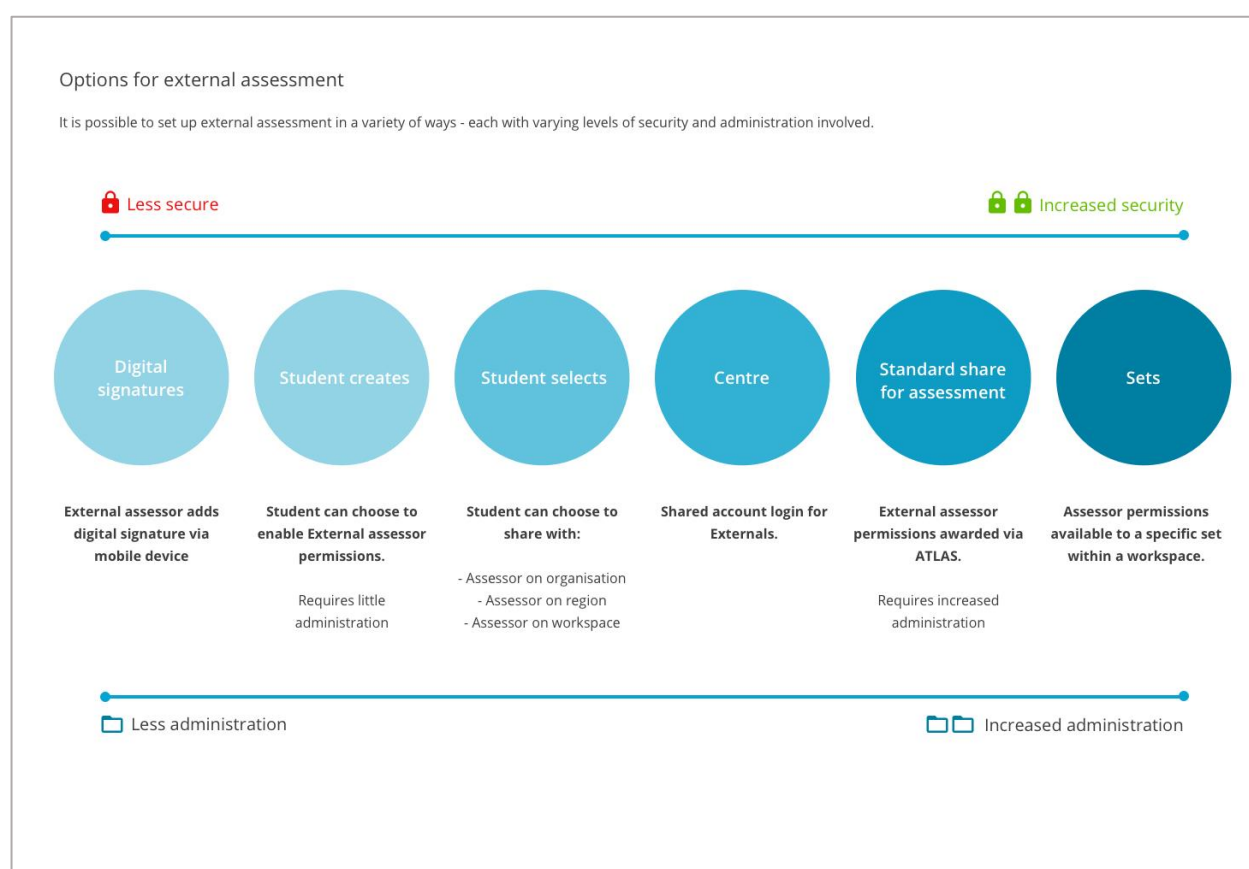
The following outlines the situations in which you might wish to use each process and a sample workflow. Instructions for setting up these processes can be found via ATLAS Help.

Enabling External assessment outside of ATLAS

This option does not require the creation of any External assessor roles

Digital signature

In this scenario, the only prior administration is for there to be a Digital signature element added to the student resource. The assessment is limited to sign-off by an assessor.

Sample workflow:

The resource creator adds a Digital signature element to a custom template or workbook that will be added to the Resource panel in ATLAS.

The student completes the work that needs to be signed off, and while still logged in to PebblePad passes their touchscreen device to the assessor. The assessor use a stylus or their finger to add a digital signature. The signature is then saved as an image onto the template or workbook, together with the name of the assessor and the date and time of the signature (if these options are selected).

When the Digital signature element is added to the resource, the resource creator may choose options to either blank the signature or display a warning if the student edits the asset once the signature has been applied.

Note: A digital signature can only be applied where provision for the signature has been made in a custom workbook or template. Digital signatures cannot be applied to other types of asset, such as portfolios, collections or activity logs, or to assets created from generic PebblePad templates.

The Competency form in PebblePocket does include a digital signature, and the asset is automatically locked upon signing.

Enabling External assessment using ATLAS

Students can choose to enable External assessor permissions

This scenario assumes an External assessor will be directly assessing the work of an individual student, for example a supervisor in a placement setting. Sometimes it is not possible to know in advance who the assessors from an organisation will be. This feature enables students to create and add an External to the workspace by using the assessor's email address.

Sample workflow:

During the workspace set up, the workspace Manager chooses the option to **Allow members to choose their own External Reviewer(s)** and then **Allow members to add External reviewers by email in Pebble+.**

The student submits the asset/s to a workspace prior to the assessment period.

Once the student has the External assessor's details, they choose to Share with the External assessor and add the name and email details into the Share form.

The External will receive an email with login details to view the asset and complete the assessment. The External will only be able to see assets that have been shared with them via this method.

Students can choose to share with Externals already added to the organisation

Similar to the previous scenario, an External assessor will be directly assessing the work of an individual student, for example a supervisor in a placement setting. In this case the institution has been provided with details of a number of possible assessors and External accounts have been created in advance. This feature enables students to search for and choose an External from the ones available.

Sample workflow:

During the workspace set up, the workspace Manager chooses the option to **Allow members to choose their own External Reviewer(s)** and then **Apply restrictions on where External reviewers can be added from.** Options are to select from the entire Organisation, the Region or the Workspace.

The workspace Manager searches for Externals to ensure they are in the Organisation, and if required, in the specific Region or Workspace.

The student submits the asset/s to a workspace prior to the assessment period.

Once the student has the External assessor's details, they choose to Share with the External assessor by searching for the External via the Share form.

The External will receive an email with login details to view the asset and complete the assessment. The External will only be able to see assets that have been shared with them via this method.

Shared account login for Externals

This scenario assumes a Centre where there may be several assessors responsible for a number of students e.g. in a hospital. In this case the Centre wishes to have a single account with a shared login, rather than each assessor having a separate External login.

Sample workflow:

The workspace Manager chooses to Create an External via the **Management – Externals** page and chooses the **Shared External account (centre-based)** option. An email address is not required for this set up, and a password is created that can be passed on to the Centre.

The student submits the asset/s to a workspace.

The External assessor uses the account credentials to login and view the Submissions page of the workspace. The assessor chooses the student submission and completes the assessment. It is important that the assessor adds their name to the feedback as the system can only recognise the Centre account and not individual assessors.

External assessor permissions awarded via ATLAS

In this scenario, each assessor has an External account created for them by the host organisation. The External will be able to view submissions on the workspace and undertake assessment.

Sample workflow:

The workspace Manager searches for the External to add to the workspace. If the External is not found, the Manager chooses to Create an External via the **Management – Externals** page and chooses the **Standard External account** option. A password will be generated and emailed to the External.

The student submits the asset/s to a workspace.

The External assessor uses their email address and password to login and view the Submissions page of the workspace. The External chooses the student submission and completes the assessment.

External assessor permissions available to a specific set within a workspace

In this scenario, each assessor has an External account created for them by the host organisation. The External will only be able to view submissions of the students (Members) that have been allocated to them.

Sample workflow:

The workspace Manager searches for the External to add to the workspace. If the External is not found, the Manager chooses to Create an External via the **Management – Externals** page and chooses the **Standard External account** option. A password will be generated and emailed to External.

The workspace Manager creates Sets on the workspace, in which Members, Managers and Externals are allocated to specific groups.

The student submits the asset/s to a workspace.

The External assessor uses their email address and password to login and will be able to view the Submissions page of the workspace. The External will only be able to see submissions from Members within their particular Set/s. The External chooses the student submission and completes the assessment.

Note: Once Sets are enabled on a workspace it is essential that all Externals are allocated to a Set. An External not allocated to a Set will not be able to view *any* student work.

Note: If you are using assessor-initiated assessments, the first two options above (user-selected assessors) are not available.

Managing External accounts in the organisation

While Externals can be created from within a workspace, these accounts are managed at an Organisational level. When a new External is created they are added to the workspace AND to the central ATLAS database of Externals.

Details of Externals (username, first name, last name, email address) can only be edited at the Organisation level by an Organisation Administrator.