

## PROSPECTIVE E-PORTFOLIO PRODUCT PROVIDER

### PRE-EVALUATION CHECKLIST

OCR is frequently approached by e-portfolio product providers to evaluate their products for use with OCR's NVQs. If an e-portfolio product has been evaluated and has met OCR's minimum requirements, OCR will publicly acknowledge and support the use of the product with its NVQs.

OCR will charge a fee, payable in advance, for each evaluation of the product. To evaluate your e-portfolio product, we will appoint a consultant who will provide a report for OCR, based on:

- a visit to a centre currently operating your e-portfolio product
- discussions of your product with
  - the centre staff
  - the candidates
  - the EV

We will provide feedback to you based on the consultant's findings. Please note that the full consultant's report will be confidential to OCR only.

Before requesting OCR to evaluate your e-portfolio product, you should review it against the following criteria first.

#### 1 ACCESSIBILITY

Is the product readily accessible to Candidates, Assessors, Internal Verifiers and External Verifiers?	✓
Can the product be accessed from locations remote from the centre?	
Can documents/evidence be easily transferred between the relevant users?	
Is it clear who 'owns' the portfolio?	

#### 2 CROSS-REFERENCING

Is it easy to cross-reference evidence within the qualification?	
Is it easy to cross-reference evidence against difference qualifications, ie, NVQs and Key Skills?	

#### 3 CANDIDATE PROGRESS

Can a candidate's progress be monitored easily by all the relevant users?	
Can Assessor's, IV's and EV's comments be viewed? If so, by whom?	
Are Assessor's, IV's and EV's original comments protected from amendment?	
Is an initial assessment check available?	

#### 4 AUDIT TRAILS

Does the product provide an audit trail?	
If so, who can access the audit trail?	

#### 5 SECURITY

Are unique security passwords/IDs provided for each level of user?	
Are read-only rights provided?	
Is there provision to ensure qualified Assessor or IV validation of the decisions of unqualified Assessors or IVs?	
Is the target achievement date for unqualified Assessors or IVs shown?	
Is it possible to electronically store sample signatures/handwriting?	
Is it possible to 'lock' completed units?	

#### 6 USER FRIENDLY

Is it easy to store text, sound, scanned images/pictures, video evidence?	
Does your product use standardised templates?	
Does your product permit customisation for candidates with special requirements?	
Does your product provide links to other documents/areas, eg, centre policies and procedures, qualification documentation?	

#### 7 CONTINGENCIES – SYSTEM FAILURES

Does your product provide a back-up facility in the event of system failure?	
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#### 8 ARCHIVING AND RETENTION

Do you meet the regulatory retention requirements?	
Do you safeguard against modification of archived documents?	

#### 9 INDUCTION/TRAINING PROGRAMME

Do you provide induction/training programmes for candidates and centre staff in the use of the e-portfolio product?	
Do you provide in-centre technical support?	
Would you be prepared to provide training for OCR EVs in the operation of your e-portfolio product?	

#### 10 CURRENT STATUS

Is your e portfolio product currently being successfully used by Candidates, Assessors, Internal Verifiers and External Verifiers?	
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If you are able to answer 'Yes' to **ALL** of the above questions and would like OCR to evaluate of your e-portfolio product, please contact the e-assessment team at [eportfolio@ocr.org.uk](mailto:eportfolio@ocr.org.uk).

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