ePEN2 Marker
User Guide

Version 3/ September 2020

Contents

Introduction

This guidance document contains all the key information about the ePEN2 marking system that you will need as an ePEN2 user with a Marker role.
It covers all the functions/tasks that are available so you can mark the responses allocated to you.

Getting Started

When your ePEN2 account has been created you will receive the following email:

Subject: Welcome to ePEN2!

Welcome Joe Bloggs,

Your login ID is 123456
Click the link below to set up your user account:
https://uk.pearsonepen.com/
You will need to supply the Login ID above and the email address to which this email was sent. The New User Wizard will then walk you through the creation of 4 security questions so you can get yourself back into the system should you forget your password.
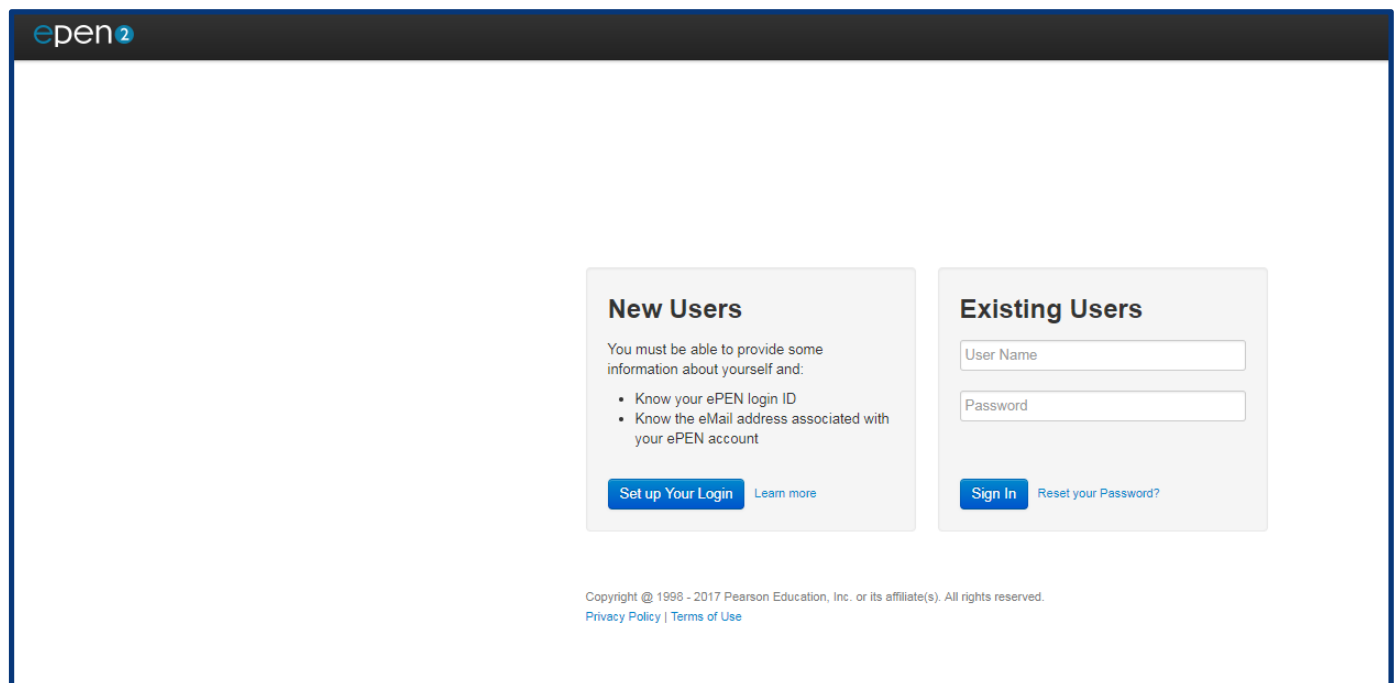

Figure 1 - ePEN2 Login page

Set Up your Login – Step 1

You should click on the link in the email, at which point you will be taken the screen shown in *figure 2* below.
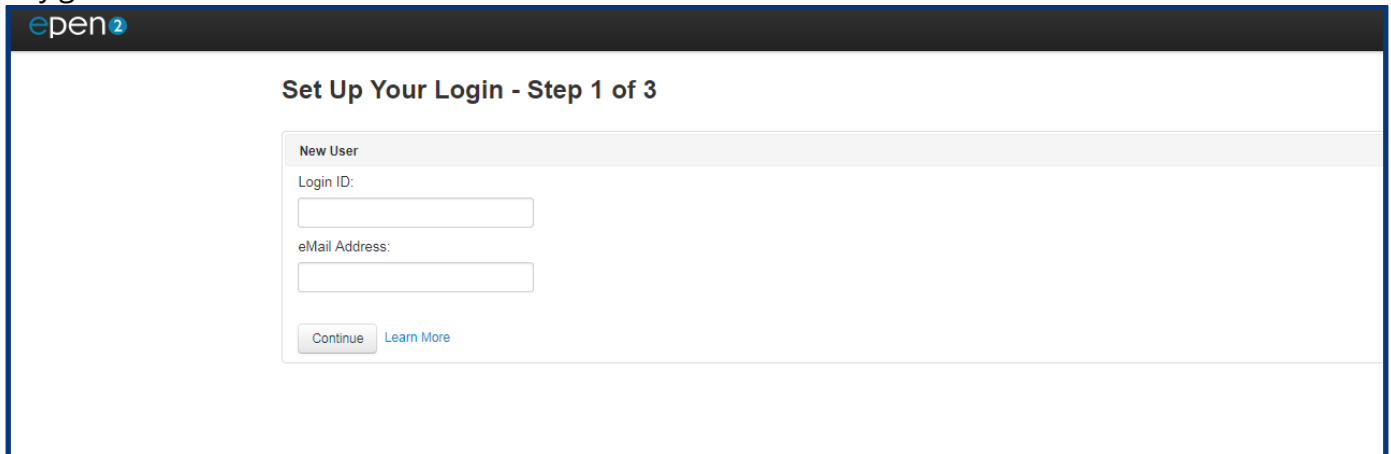

Figure 2 - Set Up Your Login Step 1 of 3

Once you have entered your *Login ID* and *eMail Address* in the relevant fields, click on the *Continue* button.

Set Up your Login – Step 2

You will then be presented with a drop-down list of security questions (see *figure 3* below). You will be required to provide (memorable) answers to at least 4 questions.
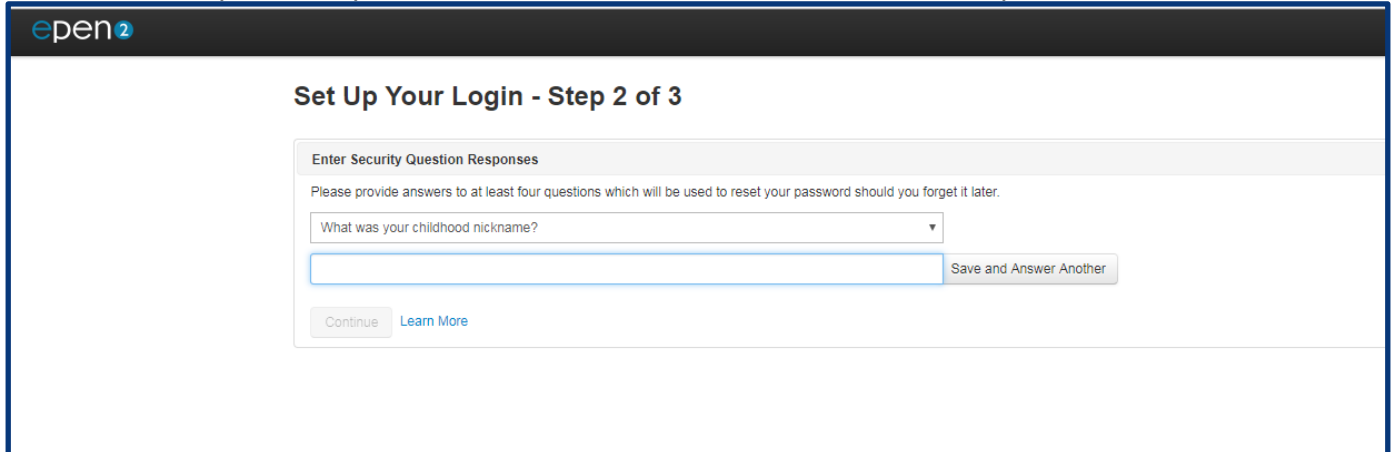

Figure 3 - Set Up Your Login Step 2 of 3

You will then be presented with a drop-down list of security questions. You will be required to provide (memorable) answers to at least 4 questions. The following are the security questions you can choose from:
- What was your childhood nickname?
- In what city did you meet your spouse/significant other?
- What is the middle name of your eldest child?
- What is your oldest sibling's middle name?
- What was your childhood phone number?
- What is your oldest cousin's first and last name?
- What was the name of your first stuffed animal?

- In what city or town did your mother and father meet?
- What is the last name of your favourite teacher?
- In what city does your nearest sibling live?
- What is your maternal grandmother's maiden name?

After providing a response for each of your four selected security questions, ensure you click on the *Save and Answer Another* button to save your answer. Once you have provided responses to a minimum of 4 security questions you will be able to click on the *Continue* button.

Set Up your Login – Step 3

You will be required to set up your password for your account in the following screen**:**

Figure 4 – Set Up Your Login Step 3 of 3

The password you set must comply with the following rules:
- The password must contain at least 8 characters
- The password must contain 3 of the following 4 character types
    - A number
    - An uppercase letter
    - A lowercase letter
    - A symbol character
- The 'Enter a password' and 'Re-enter password' fields must match
- The password expires every 30 days
- Passwords cannot be reused for 12 months

When you have set a password that meets the above criteria, click on the *Finish* button. You will then get the confirmation box in *figure 5* below. Click on the *OK* button to complete the setup process.
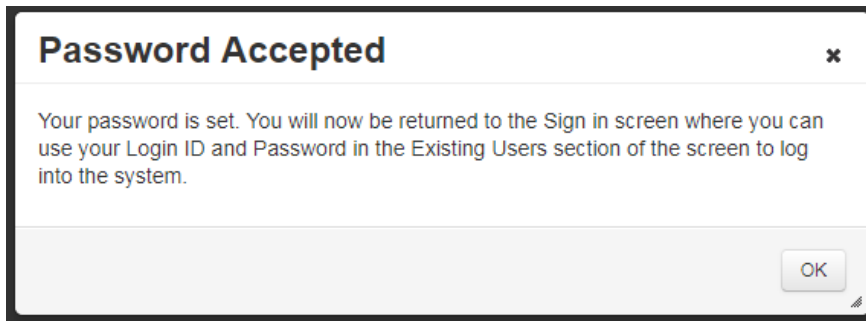
For every subsequent series that you are contracted for you will not receive a notification email from ePEN2. Instead you will receive the following notification:

Dear %FORENAME%,

Thank you for accepting a contract for the upcoming examination series. For this marking series you will be using our marking platform ePEN2. To ensure you are ready and familiar with the marking platform please follow the guidance contained within this email.

Accessing ePEN2

If you have already set up an account on ePEN2, when logging in use your Log in ID as the username and the password created when you setup the account.

Access ePEN2 here: *https://uk.pearsonepen.com*

Log in ID: %LOGINID%

Unable to remember your password? *Click on Reset your Password. Using your Login ID and email address (%EMAIL%), you will be able to run through your security questions and reset the password.*

Never created a new user account for ePEN2? *Click on Setup your Login. Using your Login ID and this email address (%EMAIL%) you will be taken through the steps required to set up your account.*

Papers you will be marking on ePEN2 using this account:

%SUFFIX% *(This will be a list of papers assigned to your ePEN2 account, in line with the papers you have accepted a contract for)*

What you need to do now

In preparation for this series and to ensure you do not encounter any delays during the marking window please carry out the following:

1. *Ensure you can **Log into ePEN2***
2. *Make sure you are optimised to use ePEN2 by reviewing **ePEN2 System Requirements**.*
3. *Review **ePEN2 Support** material on the website and view relevant tutorials.*
4. *Familiarise yourself with the platform*

By carrying out these steps you will be best prepared to use ePEN2 during this marking window.

What will happen next

If you have not already, you will soon be attending standardisation for the relevant paper(s). Please be aware live papers will only be available 48hrs after the exam has taken place.

*If you need to contact us please visit **Pearson Associate***

Kind regards,

Online Assessment

Your ePEN2 Account

Your ePEN2 account will be as a Marker role and will contain all the units on which you have been contracted as either an Expert or Graduate Examiner within an exam session. You will therefore be able to access all your contracted papers through one ePEN2 account.

Logging into your ePEN2 Account

Figure 6 – ePEN2 Login Page

Figure 6 above shows the page on which you will log into ePEN2 using your Login ID and the password you have created. In the *Existing Users* box enter your Login ID (from your Welcome to ePEN2! eMail) in the *User Name* field and your selected password in the *Password* field. Then click in the *Sign In* button.

You will be presented with the End User Terms and Conditions. Read them and if you agree, click on Accept to continue.

Figure 7 – ePEN2 End User Terms and Conditions

The ePEN2 Home Page

The ePEN2 Home Page, *figure 8* below, contains links to other key areas of the system such as the marking screen and progress reports.
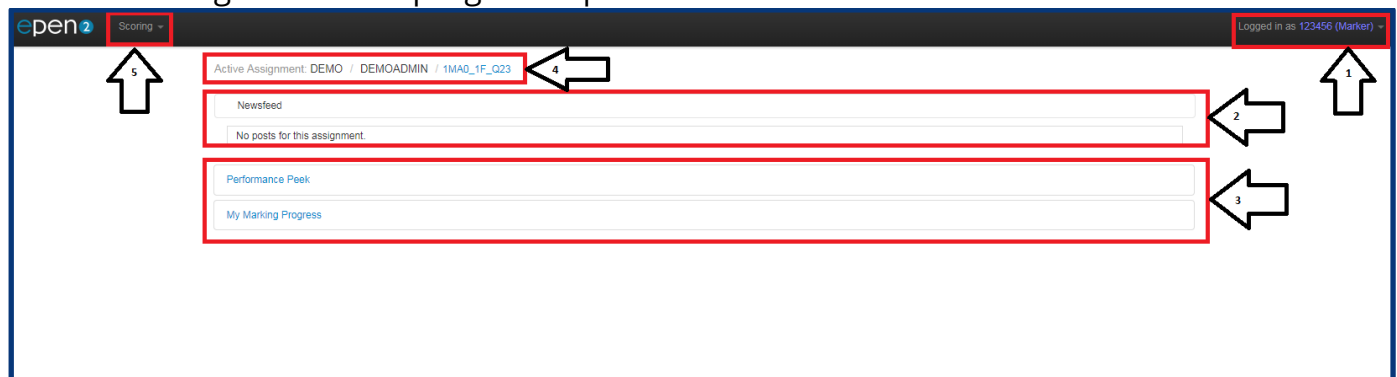

Figure 8 – ePEN2 Home Page

1. Account Settings

In the top right of the screen you will see your username and the ePEN2 role of your account e.g. *Logged in as 123456 (Marker).* Beside this is a drop down list button which will allow you to access:

- Help - clicking on this link will display a list of the Quick Reference Guides that are available for Markers.

- Preferences - from this screen you can check and amend your personal details such as email address and phone number on the User Information tab. On the Change Password tab you can also change your Account password.

- Logout - clicking this will log you out of ePEN2.

2. Newsfeed

Messages either from Pearson or your Senior Examiner that are relevant to the selected Active Assignment will be displayed here.

3. Reportlets

Real time reports on your marking performance will be available in the *Performance Peek* and *My Marking Progress* reportlets

4. Active Assignment

The Item (Assignment) that you are currently working on will be displayed here. Clicking on the link (e.g. *5MB1H_01_Q01a*) opens a pop-up where you can switch between assignments.

5. Scoring Menu

In the top right-hand corner of the Welcome Page you will see the Scoring menu. Clicking on this will display the following options:

- Mark Student Responses - from this screen you will be able to access Candidate responses for the item you currently have selected as active. This is where you will mark Candidate responses.
- Messaging – you can send and view messages to and from your Supervisor.

How to change your Active Assignment

From the ePEN2 Welcome Page, click on the Item name (see below) to view the other items assigned to your account.
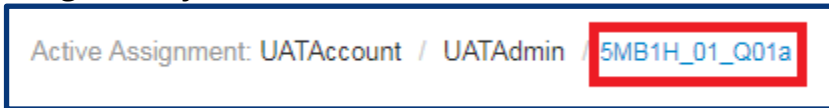

Figure 9 – ePEN2 Active Assignment

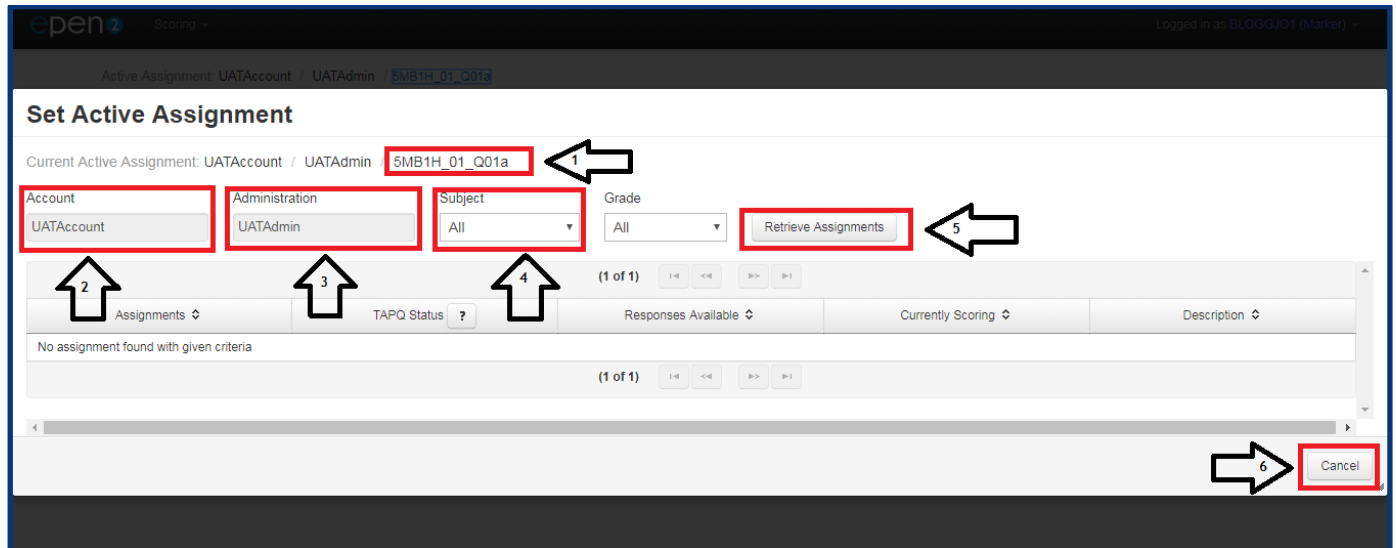The *Set Active Assignment* screen is displayed.

Figure 10 – ePEN2 Set Active Assignment

The screen elements as labelled above are as follows:

1. Current Active Assignment – The item which is currently active will be displayed here
2. Account – This is a drop down list which will allow you to switch between the Demo and live qualification environments which you have been given access to.
3. Administration – Each exam series that you have been contracted to mark will be available from this drop down list.
4. Subject – If you have been contracted to mark across different papers (same role) then you will be able to filter the list of Assignments (items) by selecting a specific Subject name from this drop down list.
5. Retrieve Assignment – Once you have selected the parameters, click on this button to display the list of items assigned to your account that meet the criteria you have set.
6. Cancel – Click on this button to exit the *Set Active Assignment* screen.

Once you have selected your criteria and clicked on the *Retrieve Assignments* button the list of available responses will be displayed as illustrated below.

Figure 11 – ePEN2 Set Active Assignments and list of assignments

With the available responses displayed the screen elements are as follows:

1. Pagination buttons – if the list of available assignments is long, you can use the pagination buttons to scroll through the list (available at the top and bottom of the list).

2. Assignment – All the available assignments will be listed here. Clicking on an item name link will take you directly to the *Mark Student Responses* screen where responses for the selected item can be marked.

3. TAPQ Status – TAPQ stands for Training, Anchor, Practice and Qualification. Training and Anchor are not currently used in the UK, but for Online Standardised papers Practice and Qualification will be used. This column will display the PQ status as follows:
   - **Bold font** = Required PQ Step
   - Non-bold font = Overridden PQ Step (the step is not required)
   - Green highlight = Completed PQ Step
   - Red highlight = Failed PQ Step

4. Responses Available – this column displays the current number of responses waiting to be marked.

5. Currently Scoring – This column displays the number of other examiners currently marking on the items displayed.

It is also possible to change your Active Assignment using the *My Marking Progress* reportlet. From there you can click on any of the item names.

Figure 12 – My Marking progress and switching to a new Active Assignment

You will then be asked to confirm your selection. If you're happy click on *OK*.

Figure 13 – Confirming the change of Active Assignment

Then you will be taken to *Mark Student Responses* where you will see the first available unscored response for the selected item.

Marking in the Demo environment

When you have set up your ePEN2 account it is a good idea to access the Demo environment. From here you can access historical papers which will allow you to familiarise yourself with the various areas of ePEN2. By doing this before you need to use ePEN2 you can be assured that there are no compatibility issues with your computer or browser, and if you do identify any issues you should have enough time to escalate and resolve the issue before your marking contract starts.

Accessing the Demo environment

Click on the *Active Assignment link (see figure 9)*

Select *Demo* from the *Account* drop down list and select an *Administration, Subject* and *Grade*, then click on *Retrieve Assignments. (See figure 10)*

You will then be presented with a list of assigned items. Click on the item name link and you will be taken straight to Mark Student Responses for that item. From here you can mark responses from historical papers and familiarise yourself with the user interface.

Online Standardisation (OLS)

Some papers will carry out the Standardisation activity on ePEN2. If you are unsure whether a paper you have been contracted to mark is using OLS, please consult your contract.

Once the date of Standardisation has been reached you will notice a change to your Home Page screen.
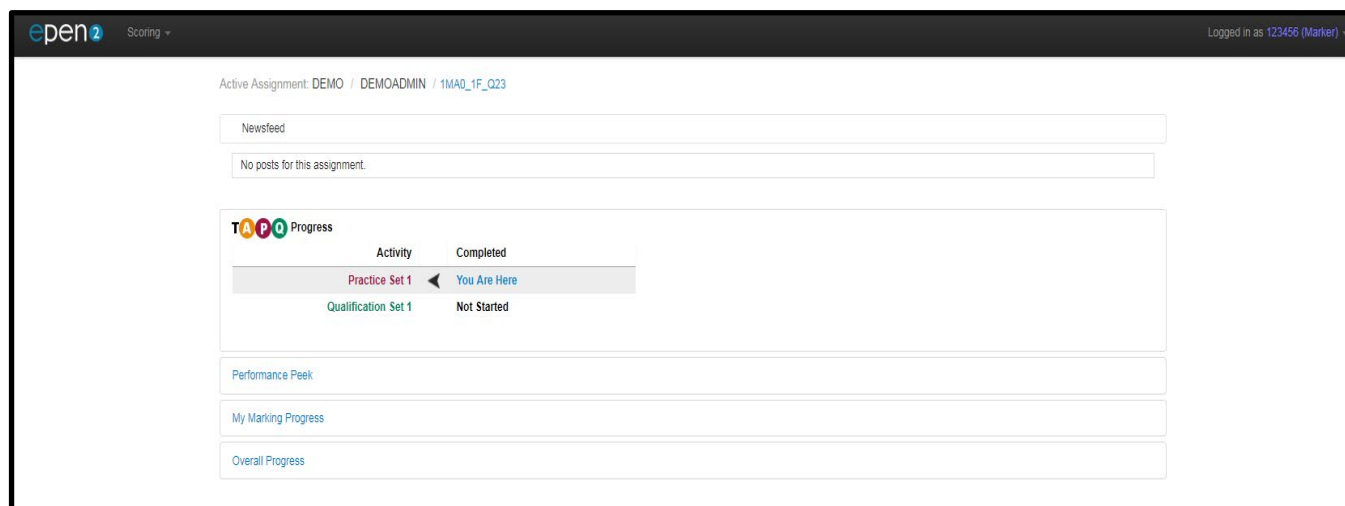
Figure 14 – TAPQ Reportlet

The system adds a You Are Here link to the TAPQ Progress reportlet. You can click the *You Are Here* link to access the Practice or Qualification sets; clicking You Are Here always lands you in the correct position within the sets should you logout before completing them. When entering a set you will be presented with the Beginning of Set message. Click on OK
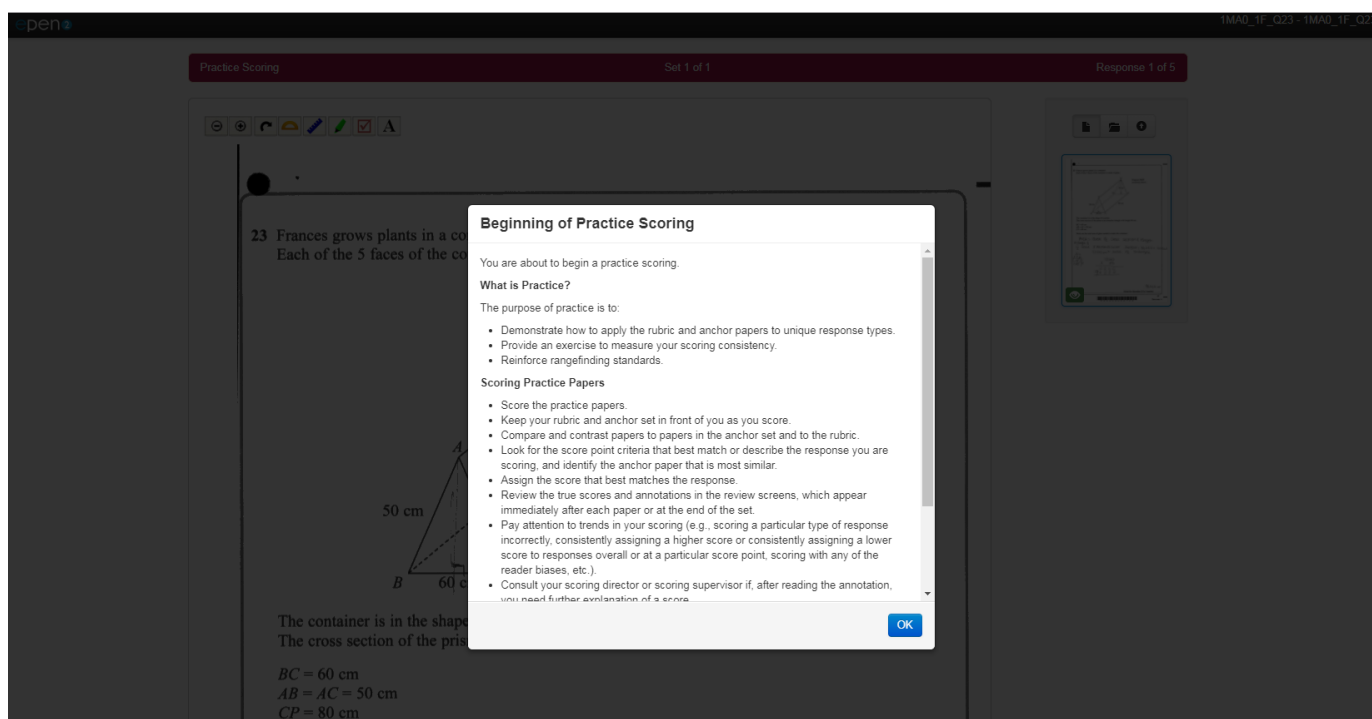

Figure 15 – ePEN2 Beginning of set message

You will then be presented with another dialogue box informing you of the item the set is for and how many sets you need to complete. Click on OK to proceed to the first response in the set.
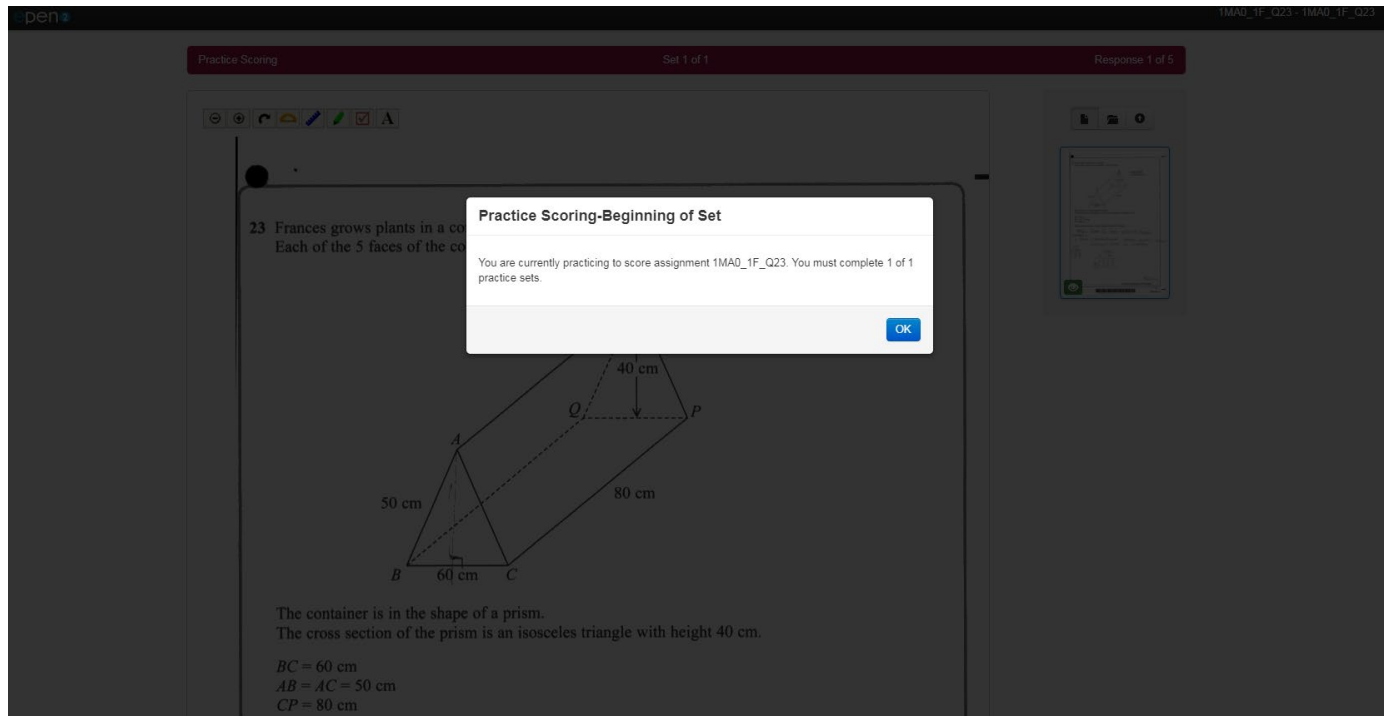
Figure 16 – ePEN2 Set content confirmation

The coloured banner at the top of the screen shows you what type of set you are in, how many sets there are for the item and how many responses are in the set.
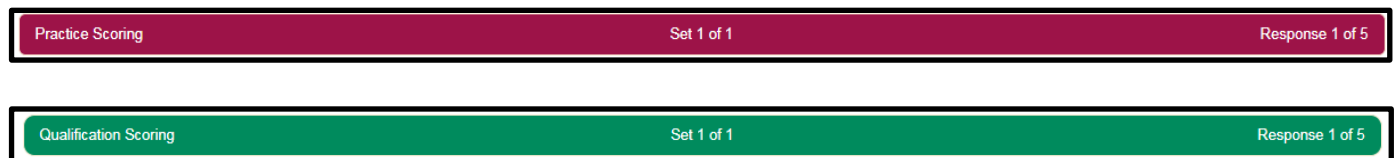
Figure 17 – ePEN2 Set banner in marking screen

After marking a response, ensure you check the True Score and then click on 'Next Response' to display the next response.

Figure 18 – ePEN2 Viewing the true score on a response

Once you have scored all responses in a set you will be presented with QC Progress Report. This will inform you on how you have performed in terms of accuracy of marking. Once you have reviewed the information click on 'Close'.

Figure 19 – ePEN2 QC Progress Report

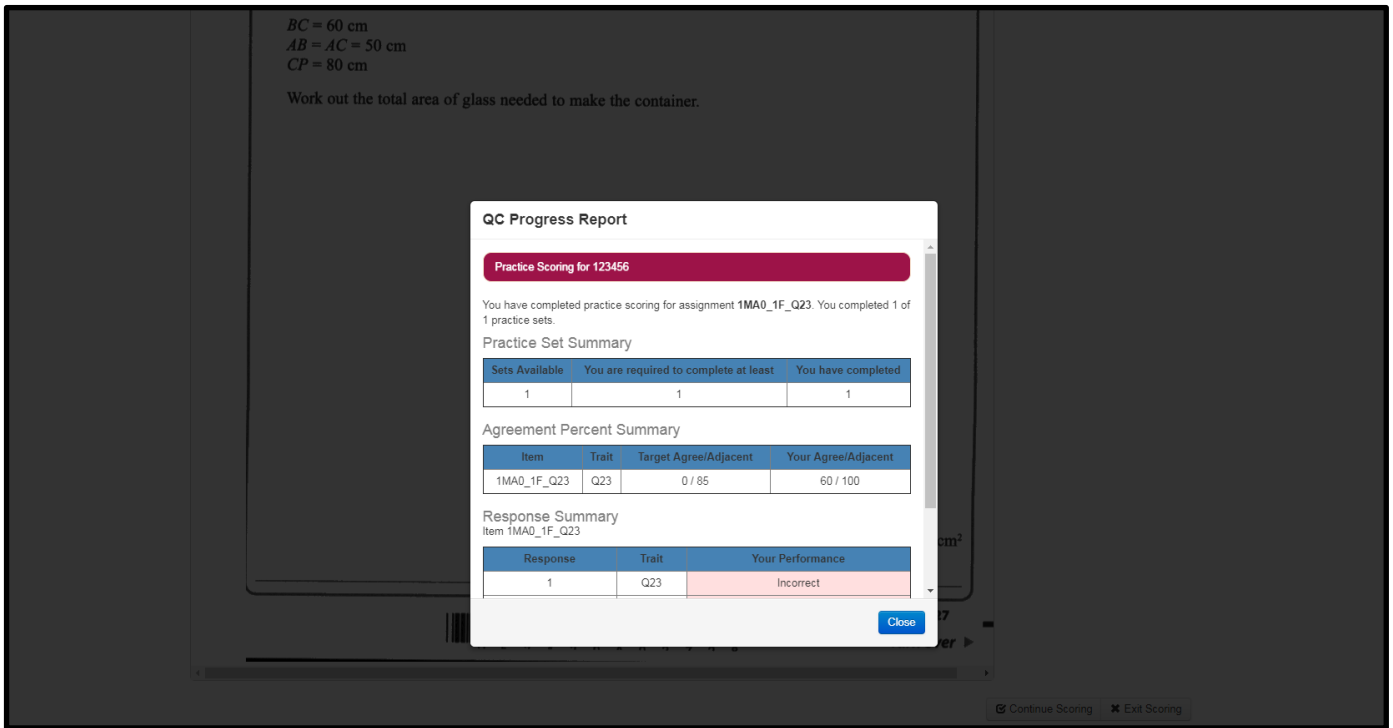You will then have the option of continuing on to the next set or Exit Scoring. It is advised that you Exit Scoring so that you can review the Mark Scheme and have a discussion with your Supervisor (dependent on the instructions you have received).

Figure 20 – ePEN2 Continue or Exit Scoring

Once you have completed a set, you will see the TAPQ Progress reportlet update with the date and time it was completed. You will also see that the *You Are Here* link has moved down to the next set you are required to complete for the current active assignment.
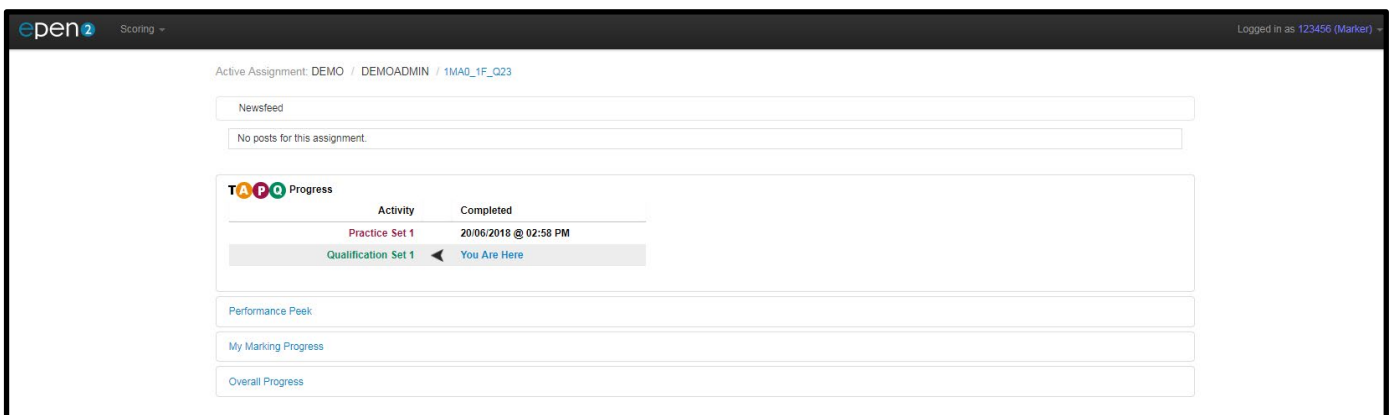
Figure 21 – ePEN2 Updated TAPQ Progress Reportlet

When you have successfully completed the Practice and Qualification sets for an assigned item, the TAPQ Progress reportlet will display 'No records found'. You will automatically gain access to mark live candidate responses**.**

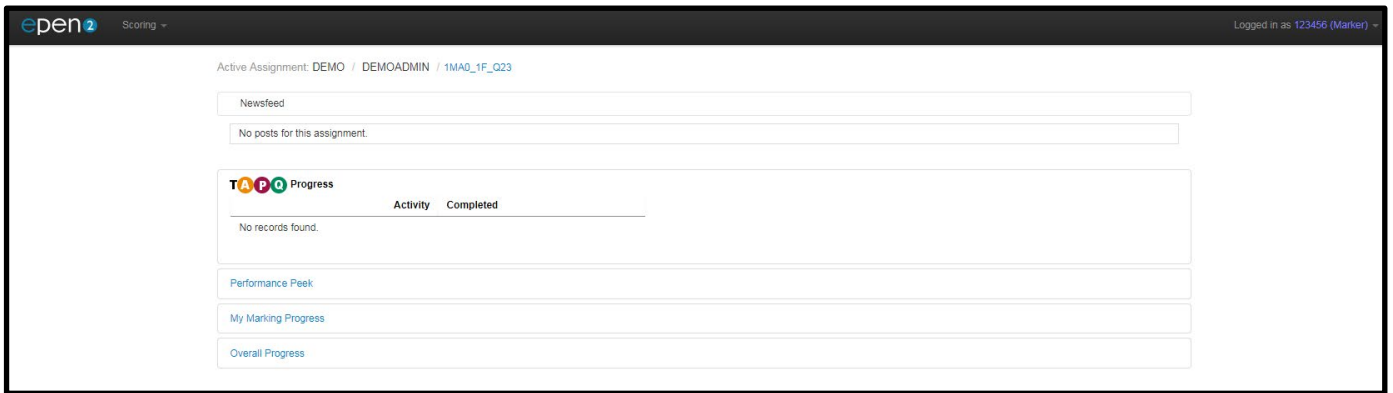*Figure 22 – ePEN2 TAPQ Completed*

If you were not able to successfully complete the Practice and Qualification sets for any given item, you will not be able to mark live responses for that item. It is recommended that you get in touch with your Supervisor should this happen.

How to mark candidate responses

After selecting the item, you wish to mark, you can access Mark Student Responses. You can access this screen by selecting *Mark Student Responses* from the *Scoring* menu on the Home page or by clicking the item name link in the Set Active Assignment screen.

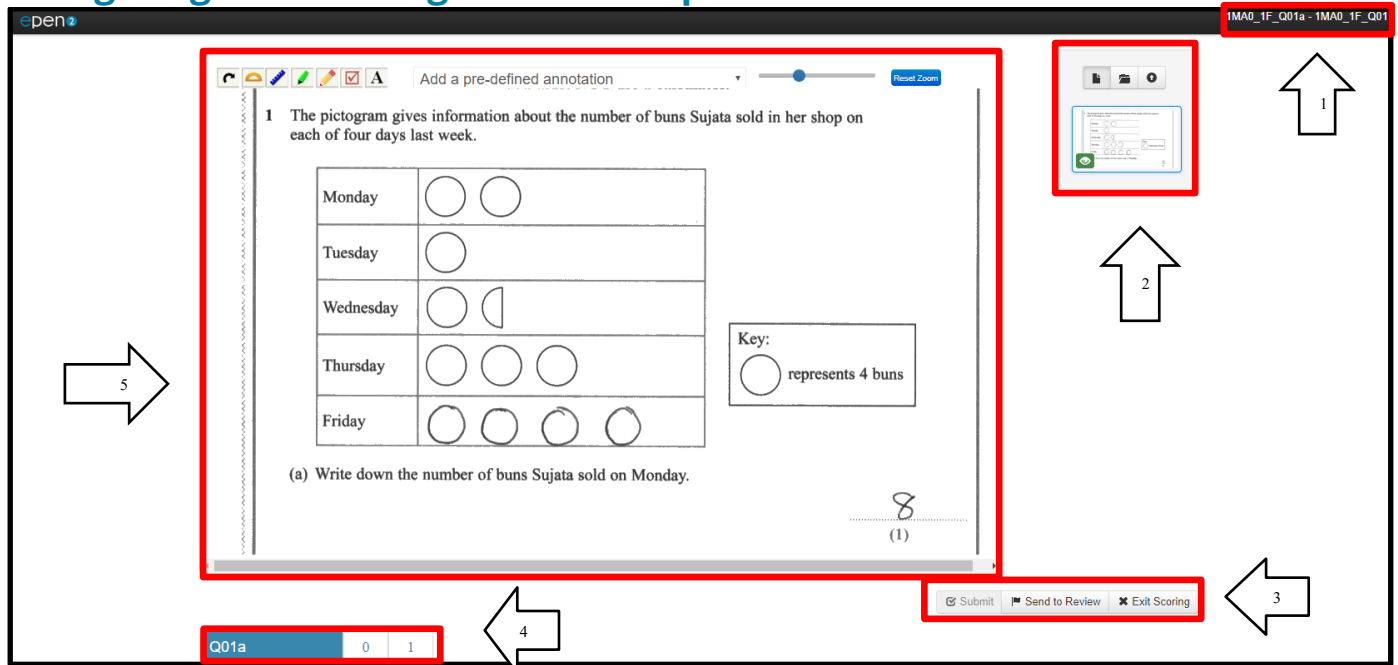## Navigating the Marking Student Responses screen

Figure 23 – ePEN2 Mark Student Responses screen

The main features of this screen (as labelled in *Figure 23)* are:

1. The item which is being marked is displayed here.
2. Select the document icon to display thumbnails of the clip images. Selecting the file icon will display the item Reference Library and the arrow icon will close the sidebar.
3. This is the action bar where you can submit marks, send a response to Review and close the Scoring window.
4. This is the marking grid but could also be in a drop-down list format. Please note that the marking grid can be displayed above, below or to the right of the clip image region
5. The clip image region – the clip image is displayed here, with the image functions displayed in the top right-hand corner of this region.

Annotation toolbar

The Annotation toolbar contains a variety of tools which functions are:
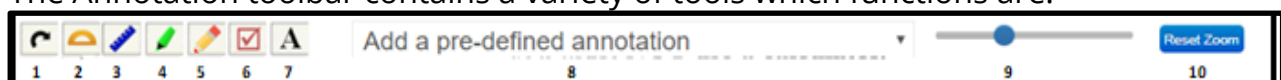

Figure 24 – ePEN2 Annotation Toolbar options

1. Rotate clip image

2. Angle measurement tool
3. Line measurement tool
4. Highlighter tool
5. Free pencil tool
6. Tick tool
7. Text tool
8. Pre-defined annotations
9. Zoom slider tool
10. Reset zoom

Marking Grids

Marking Grids are where you will input the mark you wish to award a candidate's response. They can be single trait where a single mark needs to be submitted or multi-trait where more than one mark needs to be submitted.

There are two kinds of Marking Grid which may be presented for you to input the mark(s) to be awarded to a candidate's response. The grid used depends on what has been pre-agreed and set up by your respective Assessment Team.

Grid format

When presented with this kind of Marking Grid, you will need to click within the appropriate white box to indicate the mark you wish to award.

Q06	0	1	2	3	4

Q1aAO1	0	1	2	3	4	5
Q1bAO2	0	1	2	3	4	5
Q1cAO1	0	1	2	3	4	5
Q1cAO2	0	1	2	3	4	5

Figure 25 – ePEN2 Marking Grid Types

Drop down list format

When presented with this kind of Marking Grid, you will need to click on each drop-down list and select the score point you wish to assign to each trait.

Q01	▼

Figure 26 – ePEN2 Marking pick list types

Reviewing marked responses

From the moment you first submit a score, to the point you click on *Exit Scoring* you will have the ability to review the last five (5) responses you have marked. To review these responses you will need to click on *View Buffer*.

Figure 27 – ePEN2 View Buffer

The *Buffered Responses* modal will then be displayed on-screen. The responses are listed top to bottom in the order of most recently scored. Select the response(s) you want to review and click on *Review Selected*. You will then see the selected response displayed and if necessary, you can amend the score assigned.

Figure 28 – ePEN2 Review responses

Once you have exited the scoring screen you will no longer be able to access the responses you have marked.

Sending responses to Review

There are occasions when you may come across a response you feel you are unable to mark. Should this happen you have the option to send that response to Review. This will remove the response from the marking pool and it will need to be accessed and reviewed by your supervisor.

To send a response to Review, click on *Send to Review.*
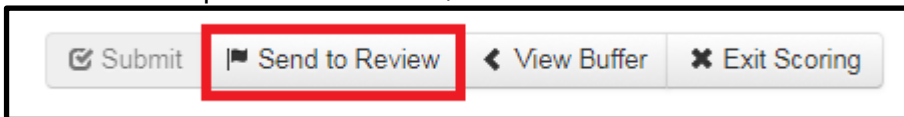
Figure 29 – ePEN2 Send to review button

This will open the *Send to Review* modal.

Figure 30 – ePEN2 Send to review category and review box

1. Select the category you wish to assign this response to. Your options are:
   - Mark Scheme – if you are unable to find information in the Mark Scheme to allow you to assign a correct score
   - Out of Clip – if part of the candidate response is clearly not included in the response clip visible on-screen
   - Malpractice – if there is a malpractice concern
   - Sample
   - Other
2. In this field you can enter some text to explain to your supervisor the reason why you are sending the response to Review. This is optional**.**

Once you have selected the appropriate category and added a brief explanatory note (optional), click on *Submit*. The response will be sent to Review and a new unmarked response will be displayed on-screen.

Messaging

The messaging feature in ePEN2 allows you to send and receive messages between yourself and your supervisory staff. If received, messages will need to be read before you can continue marking.

Reviewing Messages Received

When you have received a message from your supervisor, there are two indicators. Firstly on the Home page you will see a *(!)* next your username and role in the top right hand corner of the screen.

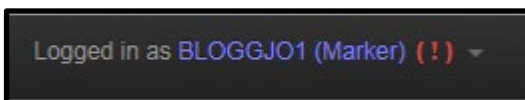*Figure 31 – ePEN2 Unread message icon*

When you click on the *(!)* the drop down list will show you have an unread message. Clicking on *Unread Messages* will take you to the message.
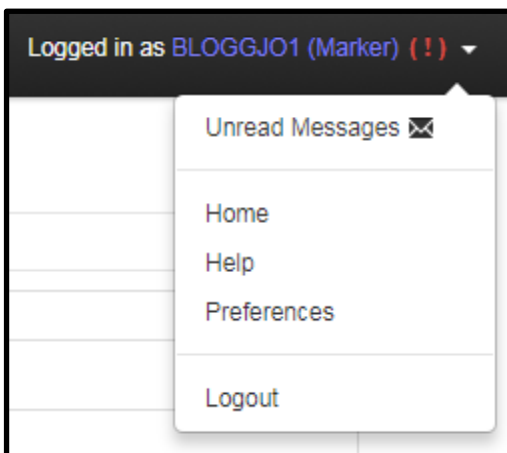

Figure 32 – ePEN2 unread message selector

If you didn't notice the *(!)* and went into *Mark Student Responses* you will be presented with the following notification.
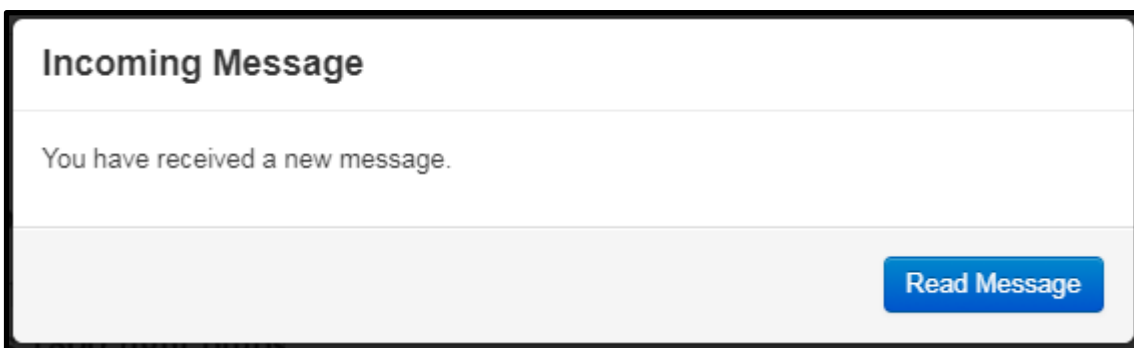

Figure 33 – ePEN2 Notice of message received

Clicking on *Read Message* will display the message along with details of the message. Once you have read the message clicking on *Continue Scoring* will restore your access to unmarked responses and allow you to continue marking.
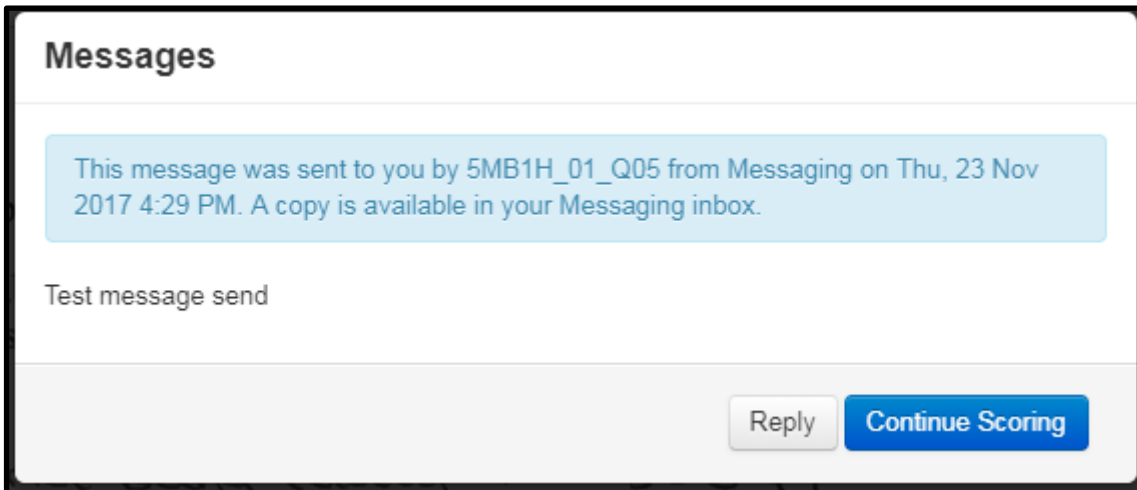
Figure 34 – ePEN2 Reading the message while in MSR

You can also go straight into Messaging by selecting the Messaging task from the *Scoring* menu on the Home Page.
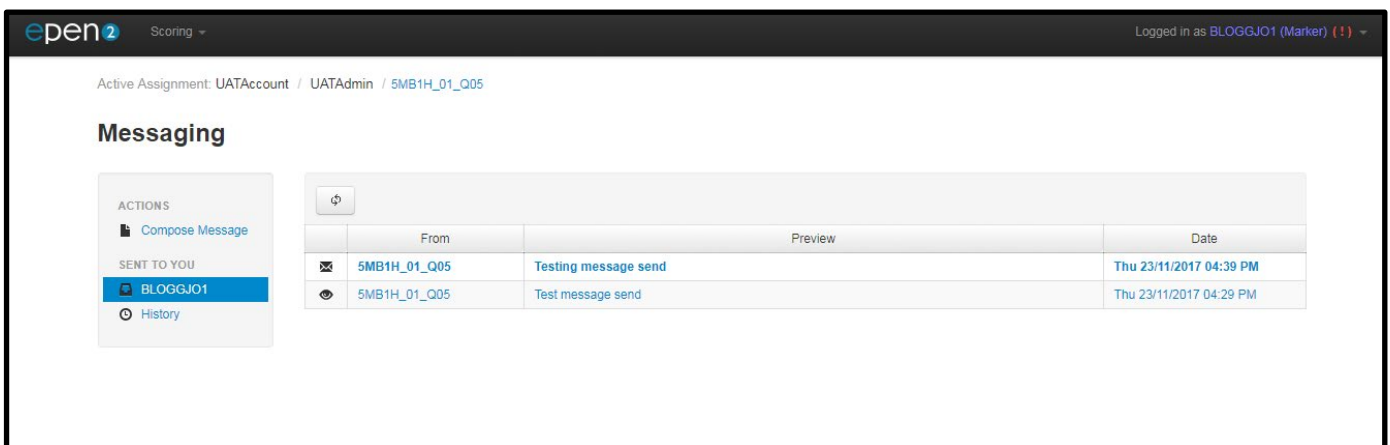
Figure 35 – ePEN2 Messaging screen

Unread messages will have the envelope icon and the wording in bold font; read messages will have the eye icon and the font will not be bold.
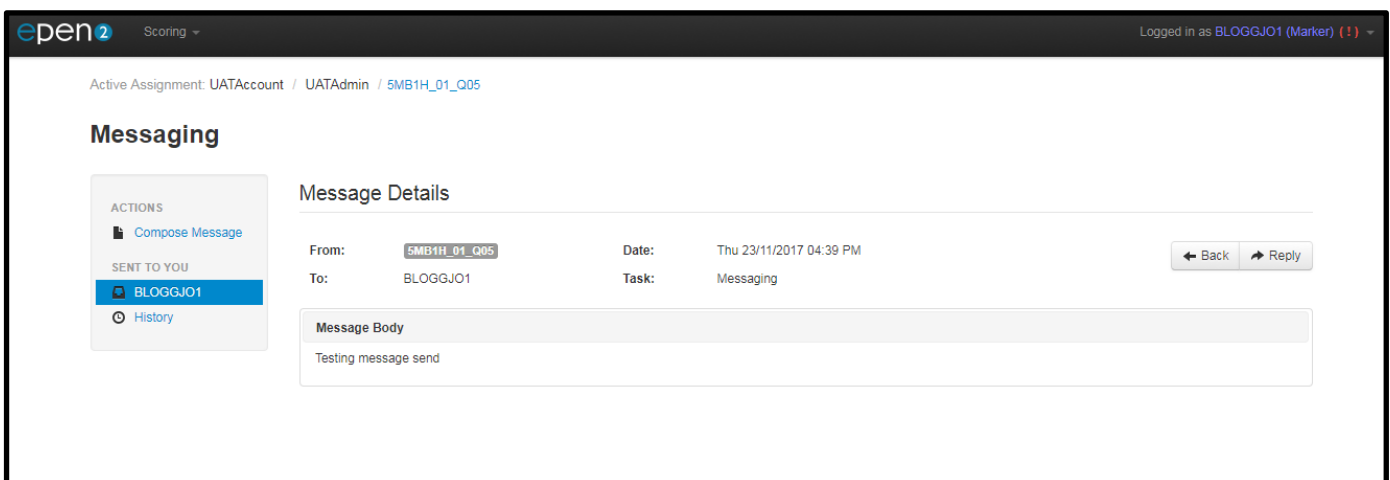
Figure 36 – ePEN2 Reading messaging in message screen

If necessary, you can also reply to any messages sent to you by your supervisor.

Composing a message

If you wanted to send your supervisor a message through ePEN2 you can do so from the *Messaging* screen. To start you will need to click on *Compose Message*.
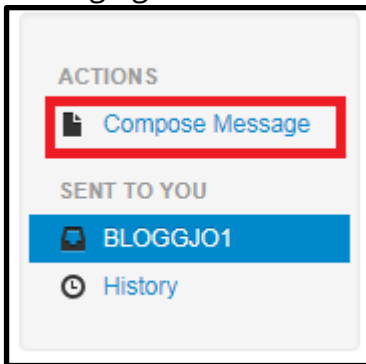
Figure 37 – ePEN2 Compose message option

You can then type your message in the field provided (up to 5000 characters). Once you have finished composing your message, click *Send*.

Figure 38 – ePEN2 Compose message from Messaging screen

Monitoring your performance and progress

Within your contract you will find details on the number of responses you need to mark along with milestone dates and volume targets. Separately, you will also receive information on the marking quality targets you will be required to meet. Via the two reportlets on the Home page (Performance Peek and My Marking Progress) you will be able to monitor your own performance against these targets on an ad hoc basis.
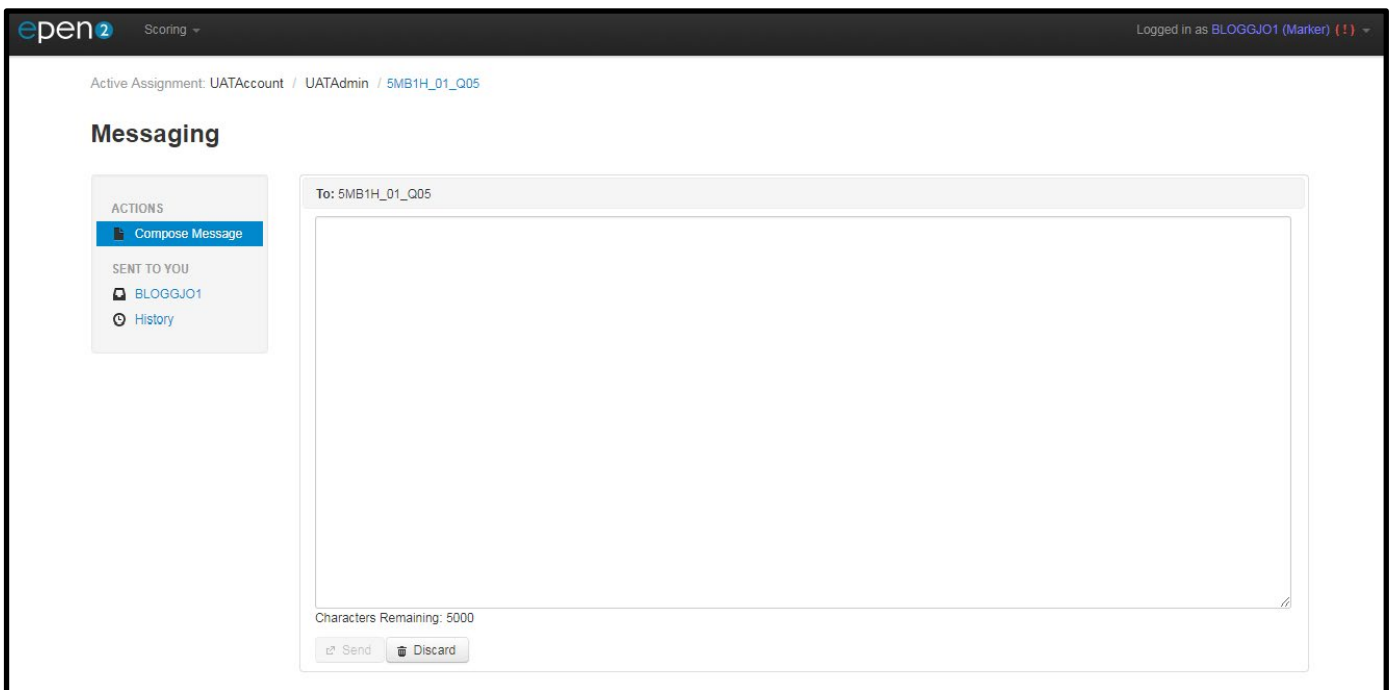
Performance Peek Reportlet

This reportlet displays data relating to the item currently selected as your *Active Assignment*.
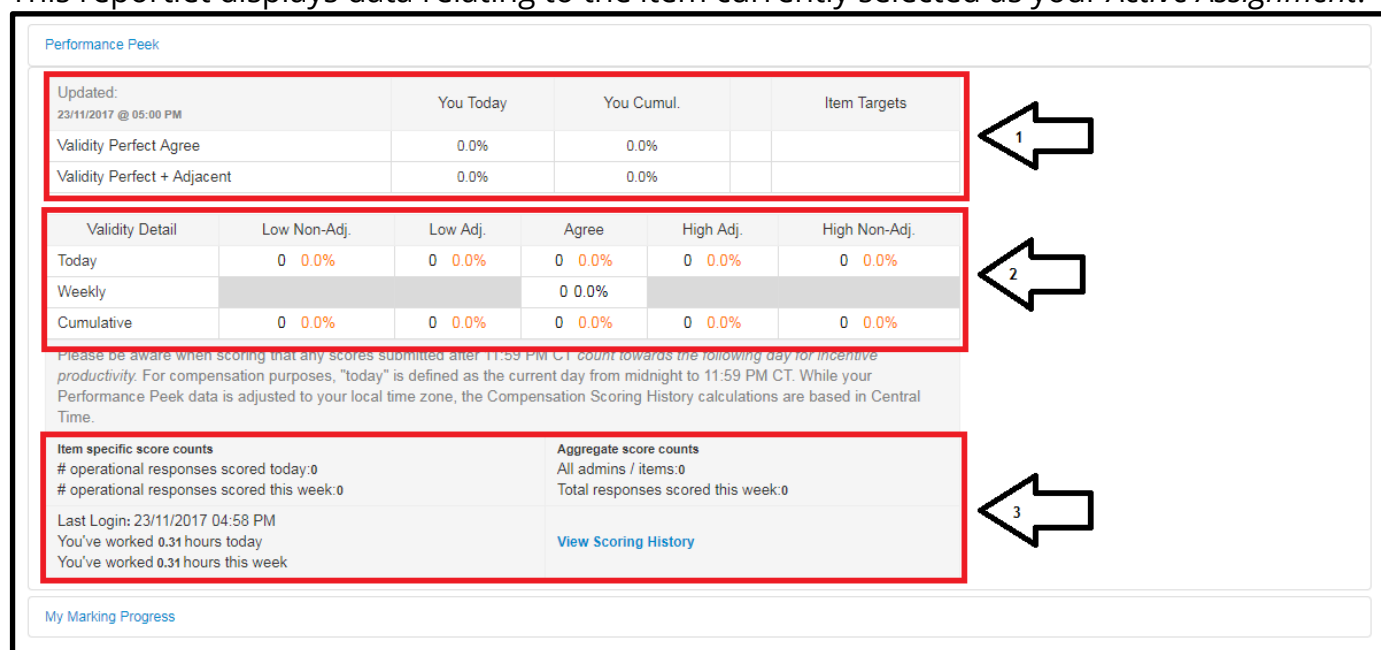
Figure 39 – ePEN2 Performance Peek reportlet

1. This section displays just the percentage of validity responses you have scored perfectly or within adjacency. This data is available cumulatively and just for the day on which you have viewed this reportlet.
2. This section not only gives you your percentage of validity responses scored perfectly or within adjacency, but also where your validity scoring has been outside of adjacency. Data is also available for the week (just for perfectly scored validity). Also along with the percentage you will see the actual number of validity responses contributing to the data.
3. This section gives you a tally of responses (for the selected Active Assignment)
    i. Scored today (excluding validity)
    ii. Scored this week (excluding validity)
    iii. Across all assigned items

Also, you can see the amount of time you have been marking on that day and that week.

My Marking Progress reportlet

In the *My Marking Progress* reportlet, you can track your progress against your marking milestones, your contractual responses, and against individual assigned items.
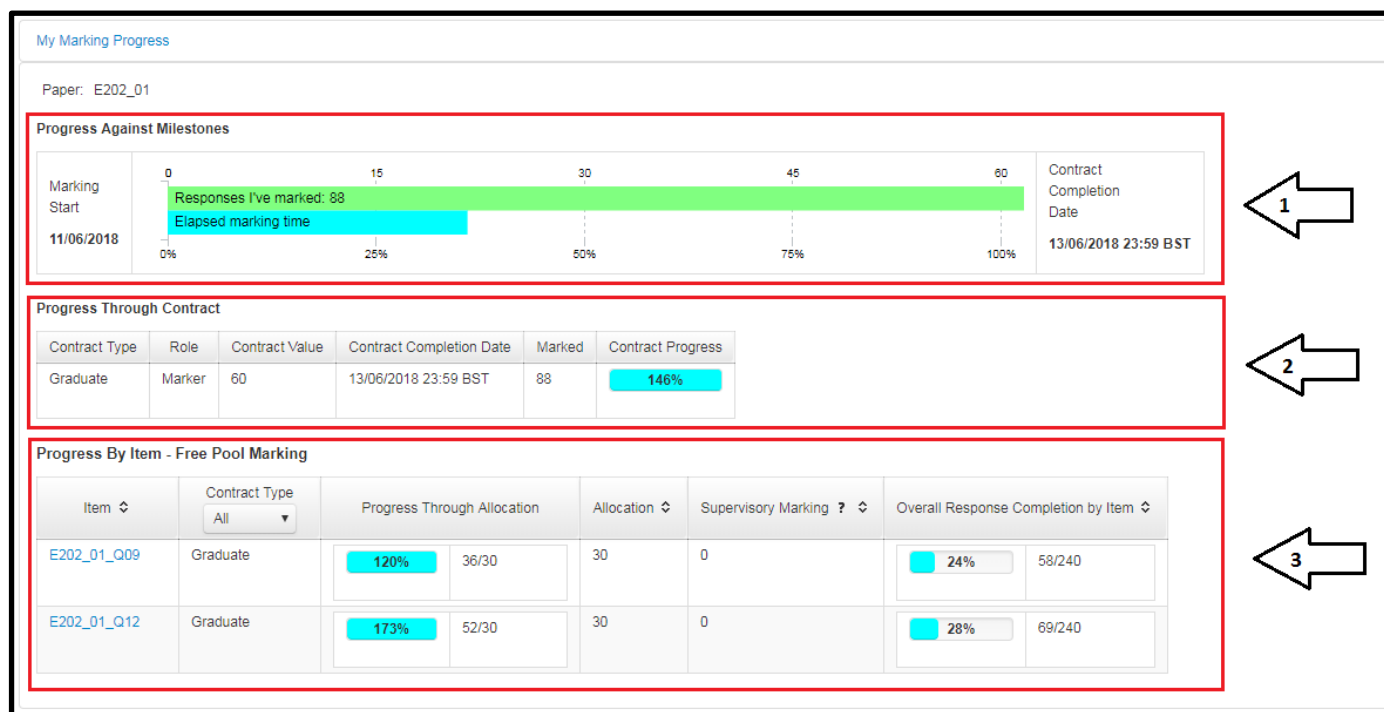

Figure 40 – ePEN2 My Marking Progress reportlet

1. **Progress Against Milestones** – the top bar (labeled 'Responses I've marked') will display how many responses you have marked . This bar will show as green if you are on target or ahead. If it is displaying as red, you are at risk of not meeting a milestone. The bottom bar (labeled 'Elapsed marking time') displays the amount of time that has elapsed since the Standardisation (STM) date. So at glance you can see whether you are marking at a pace which will allow you complete your contract by the stated deadline.

2. **Progress Through Contract** – The table presents, in figures, the overall amount you have been contracted to mark, the amount you have marked (and the percentage) and the number of responses left to mark. If you are marking both Expert and Graduate items for a paper, then your data will be presented against each contract type.

3. **Progress By Item** – this table shows you your marking progress against each individually assigned item. The reportlet will display your individual item allocations and the number of responses you have marked for each item. The last column on this reportlet will show you the number of responses which have been marked for each item by *all* the markers on the paper, and the number of responses available on ePEN2.

To the right of the Progress By Item section title, the current marking window is also indicated. This will be displayed as:

- **Familiarisation Phase** – this is the marking period before Standardisation Reset. During this time marking progress is reset every 24 hours. So be sure to take screen shots of your marking progress before 11:59pm every day, just in case your Supervisor requests evidence that you have completed your familiarisation marking. You will not have any stated item allocations during this time.
- **Operational Marking** – this is the marking period immediately following the Standardisation Reset. It will continue up until 11:59pm on the Contract Completion Date (CCD). At this point you will have your item allocations set (if there are sufficient responses available to calculate the allocation distribution). If you complete your allocation during this time and there is a pool present you will receive automatic access to the pool, but your item allocation values will not change.
- **Free Pool Marking** – this is the marking period immediately after the CCD has passed. During this time all unmarked responses become part of the pool and all eligible Examiners will have access to mark them. Please note that your item allocation values will not change. If you have completed your contract allocation before CCD, then any further marking completed is paid at an incentivised rate.

Additional Support and Guidance

While this document is intended to inform you of how ePEN2 works in terms of interacting with the User Interface (UI) available to you as a Marker, it does not detail how you will use it in practice. To support you in the practical use of ePEN2 there are a number of resources available to you via the Edexcel Gateway. From there you will be able to access:

- Interactive training modules: each module runs for 5-10 minutes.
- Quick Reference Guides: Step-by-step instructions on how to carry out various tasks on ePEN2.
- Details on how to contact the AA Helpdesk along with details of their hours of operation.
- The minimum specification requirements for any computer or laptop being used to access ePEN2 for marking.

Frequently Asked Questions (FAQs)

Below are some common questions along with answers/resolutions.

Question	Answer/Resolution
I have forgotten my ePEN2 password.	Click on the *Reset my password* link and provide the answer to the selected Security Questions. You will then be asked to enter and confirm a new Password.
I have forgotten the answers to my security questions.	Please contact the AA Helpdesk who will be able to reset your security questions, giving you the ability to set them up again. Please note that for data protection reasons you may be asked to confirm some details we hold on you.
I am unable to see script images/clips.	Please ensure you are accessing ePEN2 via a compatible browser. The ePEN2 Minimum Requirements document lists all compatible Browsers.
I am unable to access one of my assigned items. (not listed in my Active Assignment list or no link on the My Marking Progress reportlet	You have been locked out of the item by your Supervisor. Please contact your Supervisor for further details.