



**Pearson**

**Distance learning and  
assessment policy**

**Quality Services and Governance**

**Who and what is this policy for:**

This policy is for centres who are applying to use distance learning or assessment in our qualifications and outlines the minimum requirements needed to deliver our qualifications in this way.

# Pearson Education Ltd – Our Mission and Values

Welcome to Pearson, the world's learning company. We have a simple mission: to help people make more of their lives through learning. Whether it's at home, in the classroom or in the workplace, learning is the key to improving our life chances. We are the UK's largest awarding body and we are regulated by Ofqual (England), SQA Accreditation (Scotland), CCEA Regulation (Northern Ireland) and Qualifications Wales (Wales). We offer academic and vocational qualifications that are globally recognised and benchmarked, with educational excellence rooted in names like Edexcel, BTEC, and LCCI.

Our regulatory policies are integral to our approach and articulate in a consistent way how we meet regulatory requirements. These policies are designed to support centres and learners with the design, delivery and award of Pearson qualifications and services.

## Contents

1.	Scope of policy .....	3
2.	What is distance learning and assessment?.....	3
	Distance learning and assessment are not appropriate where: .....	4
3.	How to apply to use distance learning or distance assessment.....	4
	Step 1: Complete and submit a Distance Learning Self-Assessment (DLSA) Form when you apply for qualification approval .....	4
	Step 2: Outcome of your application .....	5
	Step 3: Register your learners (after receipt of approval confirmation).....	5
4.	Regulatory references .....	5
5.	Helpful links and documents.....	6
	Other Pearson regulatory policies and guides (available from our webpage): .....	6
6.	Policy review date.....	6
7.	Useful contacts .....	6
A.	Appendix A Distance Learning Quality Self-Assessment (DLSA) with guidance notes .....	7
	The Self-Assessment .....	7
B	Appendix B Additional guidance .....	14
	Tips on authenticity of learner work and detecting plagiarism in distance assessment .....	14
	Tips on the movement of learner evidence of achievement and data.....	14
	Tips for using e-portfolios for assessment and system access and security.....	14

# 1. Scope of policy

- 1.1 This policy applies to the delivery of programmes of learning leading to Pearson qualifications, through means of distance learning and/or assessment for the majority or all of the programme.
- 1.2 The policy outlines the minimum requirements that you need to meet to be able to use distance learning or distance assessment.
- 1.3 It is essential that you understand, and follow, any qualification and unit-specific requirements for delivery or assessment that are set out in the qualification specification.
- 1.4 [The Skills Funding Agency \(2018-2019\)](#) states within their **apprenticeship** funding rules that funding **cannot be given to off-the-job training delivered by distance learning**. Off-the-job training can be funded if it provides a mixed delivery model, for example, distance, online or blended learning as per the limit of the funding band.
- 1.5 Distance learning and assessment may not be the right approach for some learners so it is important that you recruit with integrity. Distance learners will need to have the technical and communication skills to enable them to work independently and communicate effectively.

# 2. What is distance learning and assessment?

**Distance Learning** is a mode of delivering education and instruction, often on an individual basis, to learners who are not physically present in a traditional setting such as a classroom.

## ✓ Examples of distance learning

- Learners studying independently using a virtual learning environment for example online packages, posted resources, telephone support.

## ✗ What is not distance learning

- Learners are released from employment to attend classroom based theory sessions.
- Learners are undertaking practical experience, out of the classroom, that is part of the qualification.
- Remote teaching or learning as part of a blended learning programme where at least 50% is conducted face to face.

**Distance Assessment** is a method of assessment delivered to learners away from a centre, with little or no face to face contact with tutors, where the assessment is designed to be carried out remotely. Distance Assessment enables learners to be assessed even if they are in situations/settings where traditional methods of assessment delivery may be difficult or impossible to operate.

## ✓ Examples of distance assessment

- Use of e-portfolio / E-assessment where this is the sole means of contact between the learner and the assessor.
- Assessments completed in a location remote from the assessor, without direct supervision from a centre. For example, assignments completed using a Virtual Learning Environment or assessments completed as part of correspondence courses.

## ✗ What is not distance assessment

- Learners are assessed in their workplace, by an assessor, for a work based learning programme (for example, NVQ Construction).
- Pearson set exams that must be completed under supervision (on demand tests).
- E-portfolios which are being used in traditional learning settings.

## Example of distance assessment: Pearson Higher National Diploma Level 5 in Business

Learners are home based. Programme may be delivered and assessed by:

- Learners working from their computers at home
- Video conferencing
- Videos and CDs are provided
- Online learning materials are provided
- Electronic chat forums and virtual classrooms
- Tutor marked assignments by post or email
- Learners come into the centre for supervised assessment
- E-portfolio

Support is available to the learners by:

- Tutor support by phone or email during centre opening hours
- Assignments are marked and returned to learners within a week
- There is a technical support helpline for learners

Learners work is authenticated by:

- Supervised assessment activities
- Password controlled/voice recognition software is being used
- Telematic equipment (online or telephone questioning with the learner)
- Employers authenticate the learner's work

### Distance learning and assessment are not appropriate where:

- Practical skills and/or interaction with individuals/equipment need to be demonstrated and assessed.
- The assessment methods chosen by the centre to meet the requirements of distance learning are not the most appropriate to assess learners' achievement of the learning outcomes.
- There are group work situations/units where collaboration with others is needed.
- There is a requirement for learners to be overseen in person by centre staff at a specific physical location, under controlled conditions, this includes observations of performance in SVQ/NVQ type competency based qualifications and Pearson externally set and marked examinations and controlled tasks.

## 3. How to apply to use distance learning or distance assessment

### Step 1: Complete and submit a Distance Learning Self-Assessment (DLSA) Form when you apply for qualification approval

- 3.1** You must have approval for a distance learning or assessment mode of delivery. It is important that **you do not start delivering a programme** by distance learning or distance assessment **without approval** as this could lead to specific sanctions or withdrawal of your centre or programme approval.

#### Distance learning and assessment Policy

Owner Head of Centre Management

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November 2018 version 2 DCL 1: Public (Unclassified)

Ratified by PUKLT December 2018

- 3.2 Applying to us means that we can put quality assurance procedures in place to support you and your learners. Visit our [qualifications approval page](#) for details on how to apply for approval.
- 3.3 **If you are already approved** for qualifications which you now want to deliver by distance learning or assessment you will need to let us know by submitting a completed DLSA Form and send it to [ukapproval@pearson.com](mailto:ukapproval@pearson.com) or [internationalVQapproval@pearson.com](mailto:internationalVQapproval@pearson.com).
- 3.4 We may ask to see some of the evidence that you have recorded in the DLSA Form.
- 3.5 We may need to visit your centre to confirm how the approval criteria can be met for this mode of study. You will need to demonstrate how your quality systems will support distance learning or assessment to ensure our approval requirements are met.
- 3.6 Please see section 5 for other useful documents to support you.

## Step 2: Outcome of your application

- 3.7 There are three possible outcomes to your application:
  - Your application is successful and we do not need any further information now. You can start delivering distance learning and/or assessment as detailed in your approval letter.
  - Your application is incomplete and we will ask you for further information
  - Your application is unsuccessful. We will write to you to explain why you have not been successful. If you wish to reapply for approval later, you will need to develop an action plan to address any requirements.

## Step 3: Register your learners (after receipt of approval confirmation)

- 3.8 When you register learners, you need to tell us which learners are being taught or assessed at a distance.
- 3.9 When you register your learners, you should check the distance learning option under 'mode of delivery'.
- 3.10 We will continue to support and monitor your use of distance learning or distance assessment through the normal Standards Verification process.

## 4. Regulatory references

- 4.1 UK regulators require all awarding organisations to establish and maintain their compliance with regulatory conditions and criteria. As part of this process, policies that relate to Pearson's status as an awarding organisation will reference any conditions and criteria that they address.
- 4.2 This policy addresses the following regulatory criteria and conditions:

### Ofqual/CCEA Regulation/Qualifications Wales General Conditions of Recognition

Arrangements with third parties	Condition C1
Arrangements with centres	Condition C2
Accessibility of qualifications	Condition D2
Ensuring an assessment is fit for purpose and can be delivered	Condition E4
Setting the assessment	Condition G1
Arrangements for Reasonable Adjustments	Condition G6
Completion of the assessment under the required conditions	Condition G8
Delivering the assessment	Condition G9

The awarding body shall ensure that it has the necessary arrangements and resources for the effective delivery; assessment and quality assurance of SQA accredited qualifications.

Principle 10

## 5. Helpful links and documents

- Distance Learning Quality Self-Assessment (DLQA) (please see Appendix A of this policy).
- Individual Qualification Specifications (available to download from our website).
- Quality Assurance Handbooks (available to download from our website).
- Additional qualification-specific guidance (**particularly in relation to the conduct of assessment and moderation**) (available alongside our specifications on our website).
- JCQ [Suspected malpractice in examinations and assessments: policies and procedures](#).
- The [Skills Funding Agency](#) Funding Rules.
- Apprenticeship funding: [rules and guidance for employers 2018 - 2019](#).

### Other Pearson regulatory policies and guides ([available from our webpage](#)):

- Equality and diversity policy.
- A guide to recruiting with integrity and enrolling candidates onto qualifications.
- Centre guidance for dealing with malpractice.
- Enquiries and appeals about Pearson vocational qualifications policy.
- Recognition of prior learning policy and process.
- Collaborative arrangements for the delivery of vocational qualifications policy.
- Pearson's Self-Regulated Framework policy.
- Policy for the removal of centre and programme approval.
- Supplementary guidance for reasonable adjustment and special consideration in vocational internal assessed units.

## 6. Policy review date

6.1 This policy will be reviewed in November 2019

## 7. Useful contacts

7.1 Centres in the UK can contact our UK approvals team at [UKapproval@pearson.com](mailto:UKapproval@pearson.com). Centres outside of the UK can contact our international approvals team at [internationalVQapproval@pearson.com](mailto:internationalVQapproval@pearson.com).

## A. Appendix A Distance Learning Quality Self-Assessment (DLSA) with guidance notes

- A1** Quality Assurance (QA) of distance learning, as defined in Distance Learning and Assessment Policy, is a subset of QA at Pearson with special focus and attention on nine quality categories: Centre governance, Technology Support, Centre Support, Learner Support, Course Design, Course Structure, Teaching and Learning, Learner Engagement, Evaluation and Assessment.
- A2** The DLSA contains positive quality indicators grouped in the nine categories and these must be fully met. Our experts may ask you to provide the evidence you list to support this assessment. The examples given are for your guidance, and are not an exhaustive list.
- A3** The DLSA will help you review your readiness to deliver and assess Pearson programme(s) at a distance. There are three possible outcomes from this approvals process:
- Your application is successful and we do not need any further information now. You can start delivering distance learning and/or assessment as detailed in your approval letter.
  - Your application is incomplete and we will ask you for further information.
  - Your application is unsuccessful. We will write to you to explain why you have not been successful. If you wish to reapply for approval later, you will need to develop an action plan to address any requirements.
- A4** Please check that the information on the DLSA Form is correct at the time of submission to us. Falsifying information could lead to sanctions being imposed or withdrawal of approval.

### The Self-Assessment

Positive quality indicators	Evidence may include	Your evidence
<b>1 Centre governance</b>		
You have an appropriate governance structure to guide and enable effective planning, decision making and continuous improvement relating to distance learning programmes.	<ul style="list-style-type: none"> <li>• Governance structures</li> <li>• Course review documents</li> </ul>	
The distance learning programmes are fully integrated into your policies, processes and structures.	<ul style="list-style-type: none"> <li>• Assessment policies</li> <li>• Internal verification policies</li> <li>• Course handbook</li> <li>• Prospectus</li> </ul>	
You have a process for planning and allocating sufficient resources and a well-defined budget for distance programmes.	<ul style="list-style-type: none"> <li>• IT support</li> <li>• Teaching staff with expertise.</li> </ul>	

<b>2 Technology support</b>		
A technology strategy and plan including electronic security measures is in place to ensure established standards and regulatory requirements are met.	<ul style="list-style-type: none"> <li>• There is password protection, encryption and security of data</li> </ul>	
The technology delivery platform and systems are highly reliable and operate within established, measurable technology operating standards	<ul style="list-style-type: none"> <li>• System downtime tracking</li> </ul>	
A contingency plan is in place to ensure continuity of data centres operation, student access and support services in the event of prolonged service disruption.	<ul style="list-style-type: none"> <li>• List of back-up facilities in the event of system failure</li> <li>• A contingency plan</li> <li>• Archives of individual learner evidence on appropriate media e.g. CD ROM, Flash memory sticks.</li> </ul>	
Centre staff and learners are well supported and kept informed in developing the required knowledge and skills to effectively use technologies	<ul style="list-style-type: none"> <li>• Training on how to use e-assessment</li> <li>• Course handbook</li> <li>• Staff induction</li> <li>• Training materials</li> <li>• Learner induction</li> </ul>	
Whether you maintain and manage your own data centres and technology platform or contracts/outsources hosting services all systems are managed in line with established data management practices including power, backup and disaster recovery plans.	<ul style="list-style-type: none"> <li>• A full Disaster Recovery process or plan</li> <li>• Evidence of agreements with, and monitoring of, supplier(s)</li> </ul>	
A process and development standards are in place that ensure permissions are in place for appropriate use of online course materials.	<ul style="list-style-type: none"> <li>• Creative commons, copyright or fair use permissions in place</li> </ul>	
Usability tests are conducted and applied to ensure courses are meeting Web Content Accessibility Guidelines (WCAGs) and recommendations for improvement are implemented where	<ul style="list-style-type: none"> <li>• Usability test reports and evaluations</li> </ul>	

**Distance learning and assessment Policy**

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needed before the course is available for student enrolment.		
<b>3 Centre support</b>		
<p>The centre staff receive:</p> <ul style="list-style-type: none"> <li>• Training, assistance and support before teaching on distance programmes.</li> <li>• Ongoing training and professional development related to evolving and improving practice in distance teaching and learning.</li> <li>• Training and support materials related to fair use, plagiarism, and legal and ethical concepts relevant to copyright and use of digital and web based resources.</li> </ul>	<ul style="list-style-type: none"> <li>• Training materials</li> <li>• Technology helplines</li> <li>• Staff induction</li> <li>• Staff training days</li> <li>• Training materials</li> <li>• Access to internal policies</li> </ul>	
Clear standards are established and monitored for staff engagement and expectations concerning distance teaching	<ul style="list-style-type: none"> <li>• Staff handbook with clear response times to communication and feedback</li> </ul>	
Staff have information on the ways in which learner's evidence of achievement will be assessed and the way workplace-based and performance evidence will be assessed and how this will be facilitated.	<ul style="list-style-type: none"> <li>• Assessment policy</li> </ul>	
<b>4 Learner support</b>		
<p>You should have controls in place to ensure that you are recruiting with integrity and learners can confirm their identity. Delivery by distance learning means that you may not have evidence of an individual's identity at the point of admission. You should keep documents safe, and that when learners submit work they can identify themselves either by re-submitting the documents or can provide information about that document to demonstrate who they are.</p>	<ul style="list-style-type: none"> <li>• Process for checking a learner's identity (for example gathering key documents to provide evidence of learner identity or activities to take part in for authentication purposes)</li> </ul>	

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<p>Before starting on a course, a learner is assessed to ensure that:</p> <ul style="list-style-type: none"> <li>• They have the capabilities and understanding to be successful on a distance learning programme.</li> <li>• They understand about the mode of delivery</li> <li>• They have access to the minimum technology skills and equipment required</li> </ul>	<ul style="list-style-type: none"> <li>• Pre-enrolment assessments of learners</li> <li>• Interviews for suitability</li> <li>• English language testing for HNs</li> <li>• Course syllabus</li> </ul>	
<p>During their study learners have access to:</p> <ul style="list-style-type: none"> <li>• Information and training in how to access required materials through electronic databases, digital material repositories, Learning Management System (LMS) and other sources.</li> <li>• Required course materials in digital and/or print format, such as textbooks, course readings and online teaching and learning resources before the course start date.</li> <li>• Library professionals and resources</li> <li>• Appropriate technical assistance and technical support staff.</li> <li>• Effective and timely academic, personal, pastoral, career advice and counselling.</li> </ul>	<ul style="list-style-type: none"> <li>• Online or on-site technology support available</li> <li>• Online course materials</li> <li>• Online or print resources available</li> <li>• Syllabus clearly outlines learner-tutor contact times</li> </ul>	
<p>Learner support services are focused on meeting the needs of distant learners rather than fitting existing on campus services.</p>	<ul style="list-style-type: none"> <li>• Online or on-site technology support available</li> </ul>	
<p>Frequently Asked Questions (FAQs) or Just in Time (JIT) tutorials are provided to help learners find answers to the most common questions related to studying at a distance.</p>	<ul style="list-style-type: none"> <li>• FAQs</li> <li>• Online tutorials</li> </ul>	
<p>Guidance and tutorials are provided to learners in the effective use of all technologies used for course delivery.</p>	<ul style="list-style-type: none"> <li>• Training and guidance materials</li> </ul>	

**Distance learning and assessment Policy**

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	<ul style="list-style-type: none"> <li>• Online or on-site tutorials available</li> </ul>	
<b>5 Course design</b>		
A course development process is followed that ensures courses are effectively designed for distance delivery and learners can develop the necessary knowledge and skills to meet measurable learning outcomes at the course and programme level.	<ul style="list-style-type: none"> <li>• Course syllabus</li> <li>• Course materials</li> <li>• Assessment strategies</li> <li>• Student feedback</li> </ul>	
A course review process is in place to ensure consistency in course development for learner retention and quality of the learning experience.	<ul style="list-style-type: none"> <li>• Review process</li> </ul>	
Clear course development standards and guidelines for distance course development are in place and are followed to ensure appropriate engagement between staff and learners, and interaction with content and courseware.	<ul style="list-style-type: none"> <li>• Course guidelines</li> </ul>	
<b>6 Course / Programme Structure</b>		
All courses in the distance programme include a syllabus clearly outlining course objectives, learning outcomes, assessments and assessment methods, books and required readings and supplies, technical and proctoring requirements, and other related course information making all course requirements clear and transparent.	<ul style="list-style-type: none"> <li>• Course handbooks</li> <li>• Induction pack</li> <li>• Prospectus</li> </ul>	
The structure of all courses ensures that all learners, regardless of physical location, have access to library / learning resources that adequately support the learning experience.	<ul style="list-style-type: none"> <li>• Equal Opportunity policy</li> <li>• Access and special consideration policy</li> </ul>	
Instructional materials and teaching and learning resources are accessible to all learners (including learners with disabilities), easy to use, and may be accessed by multiple operating	<ul style="list-style-type: none"> <li>• IT policy</li> <li>• Equal Opportunity policy</li> <li>• Access and special consideration policy</li> </ul>	

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systems, devices and applications, including assistive technologies.		
Opportunities and tools are provided to enable and encourage collaboration where appropriate and standards for appropriate online behaviour are established and clearly communicated within every course.	<ul style="list-style-type: none"> <li>• Learner registration forms</li> <li>• Course/learner handbook</li> <li>• Learner induction</li> </ul>	
There is a clear schedule for the delivery of the distance learning package and associated resources and study materials.	<ul style="list-style-type: none"> <li>• Course syllabus/ information booklet</li> <li>• Assessment plan</li> </ul>	
<b>7 Teaching and Learning</b>		
Learner-to- learners and centre-to-learner interactions and engagement are effectively facilitated.	<ul style="list-style-type: none"> <li>• Communication options available such as post, phone, face-to-face, email, online chat</li> </ul>	
Feedback on learner progress, assignments, and questions is constructive and provided in a timely manner.	<ul style="list-style-type: none"> <li>• Assessment policy</li> </ul>	
Centre use effective strategies to create and maintain a presence in the course.	<ul style="list-style-type: none"> <li>• Communication options available such as post, phone, face-to-face, email, online chat, video conference</li> </ul>	
<b>8 Learner engagement</b>		
Learners are provided with appropriate tools and opportunities to interact with peers and centre as an online community.	<ul style="list-style-type: none"> <li>• Online or on-site support available</li> </ul>	
<p>Learners are provided with opportunities to:</p> <ul style="list-style-type: none"> <li>• Engage with other learners in collaborative and reflective learning activities or discussions where appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>• Online or on-site facilities available (eg forums)</li> <li>• Syllabus clearly outlines learner-tutor contact times</li> <li>• Online or on-site technology support available</li> </ul>	

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<ul style="list-style-type: none"> <li>Engage, both on request and on their own initiative, with centre and support staff.</li> </ul>		
The online learning environment encourages and enables formal and informal learning interactions.	<ul style="list-style-type: none"> <li>Student feedback</li> <li>Chat forums</li> <li>Feedback on assignments</li> </ul>	
<b>9 Evaluation and Assessment</b>		
A variety of data (academic and administrative) are used to evaluate programme effectiveness and guide changes toward continual improvement, annually.	<ul style="list-style-type: none"> <li>Internal course reviews</li> <li>Departmental meetings</li> <li>Student voice feedback</li> <li>Assessment boards where applicable</li> </ul>	
Annual course evaluations collect feedback from learners on: <ul style="list-style-type: none"> <li>The effectiveness of instruction and teaching and contribute to the assessment of staff performance and planning of professional development</li> <li>The quality of course materials and support services</li> </ul>	<ul style="list-style-type: none"> <li>Programme evaluation forms</li> <li>Annual course review</li> </ul>	
There is a clear schedule for final summative assessment of learners' work.	<ul style="list-style-type: none"> <li>Assessment plans</li> <li>Assessment policy</li> <li>Internal verification policy and plans</li> <li>Learner/course handbook</li> </ul>	
There are clear instructions on the way in which you will ensure that evidence submitted by each learner is authentic.	<ul style="list-style-type: none"> <li>Instructions on authenticity of learner work</li> <li>Learner/course handbook</li> </ul>	

Signed: \_\_\_\_\_ (Head of Centre)

Date: \_\_\_\_\_

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## B Appendix B Additional guidance

### Tips on authenticity of learner work and detecting plagiarism in distance assessment

- B1** It is important that learners understand that it is their responsibility to submit only evidence that is their own, and that they are aware of any activities they will be expected to take part in for authentication purposes. As part of external quality assurance, Standards Verifiers will review the process through which centres confirm the authenticity of learners' evidence.
- B2** You should have appropriate controls in place to prevent and detect plagiarism and which allows each learner to generate evidence that is valid and can be authenticated. Read our [Guide to dealing with malpractice and maladministration in vocational qualifications](#) for more information about how to prevent plagiarism.
- B3** Through rigorous assessment and internal quality assurance processes, you should make sure that:
- Evidence submitted by each learner can be authenticated as their own work.
  - Learners and assessors complete a declaration of authenticity.
- B4** Some ways of authenticating learner work include:
- Using electronic tools and software that are designed specifically for minimising or eliminating opportunities for impersonation.
  - Audio or video taped evidence
  - Using personal logs or personal statements
  - Signing and countersigning learners work.
  - Using witness testimonies or summative assessment.

### Tips on the movement of learner evidence of achievement and data

- B5** You should take time to review and understand any restrictions on the collection and storage of data on learners and on their evidence of achievement both within and across the borders of countries in which you operate. Please refer to your specific government's website.
- B6** If you decide to use postal means for the movement of learners' evidence and for the movement of assessment records and internal quality assurance records, you must make sure that, in the event of loss of these materials in transit, learners are not disadvantaged and the security of the assessment process is not compromised. You should keep original copies of learners' evidence, assessment records and internal quality assurance records, providing authenticated copies of these for assessment through postal means as defined by the [verification procedures and guidelines](#).
- B7** Systems should have sufficient capacity to store, retrieve, generate and share all necessary data, including the ability to exchange data securely with other internal and external systems, as required, without endangering the integrity of the data.

### Tips for using e-portfolios for assessment and system access and security

- B8** If you are using e-assessment it's important to make sure that it is securely, readily and easily accessible for:
- Learners
  - Internal Verifiers
  - Assessors
  - Standards Verifiers
  - Users at locations remote from the centre

- Using witness testimonies or summative assessment
- Any other interested and validated organisation or person.

**B9** Check that access to your e-portfolios and their contents are controlled through:

- A defined hierarchy of user access Assessors
- Unique security passwords/IDs provided for each level of user
- Read-only rights provided to those with limited access
- Facility to differentiate between qualified and non-qualified assessors
- Isolation of completed units following final assessment
- Facility to grant remote access to allocated Pearson standards verifiers.

**B10** Learners should be confident that their evidence of learning will not suffer interference and will be correctly attributed to them.

**B11** Your distance learning / distance assessment system should be easy and intuitive to use for all users – learners, assessors, Internal Verifiers and Standards Verifiers - and to be capable of:

- Storing the full range of file types - text, sound, scanned images, digital pictures, video, templates and standard software applications
- Being customised for candidates with special access requirements
- Providing links to other documents/areas, such as your centre policies and procedures, Pearson qualification documentation and the relevant Sector Skills Council and professional bodies' websites
- Providing a full range of user support material, including Frequently Asked Questions and user guides.

**B12** Portfolio evidence must be retained and accessible for standards verification and audit, assessment and internal verification records must be kept for at least three years. The e-portfolio product should:

- Meet our requirements for retention of evidence
- Safeguard against removal or modification of archived documents.