

Guidelines for Migrating to CBT and Online Proctoring

This document outlines questions to ask, decisions needed and steps to begin converting exams that have traditionally been delivered on paper into an online delivery and proctoring model. While CBT exam migration is not our primary service, we are working with several institutions in need of these services to implement a coronavirus contingency plan for business continuity. We are here to act as your partner and guide in whatever capacity will be helpful for your institutional success.

In order for exams to be administered and proctored online, content must be reviewed for online-readiness and subsequently entered into a Learning Management System (LMS) for delivery. ProctorU is integrated with Canvas, Blackboard, Moodle and Brightspace (D2L). While we have API access for use in connecting to other LMS's, using one of these four will ensure the fastest conversion and migration process possible.

Step 1: Exam Readiness Assessment

Before beginning to convert exams, ProctorU's Project Manager for Exam Conversion and Exam Conversion Specialists will meet with the University to review, revise, and finalize a plan describing the activities and processes, who will be responsible for which activities (see our [Resource Planning Guide](#) for more detail), and the timeline for the conversion process. This step in the process is mission critical to the success of the project because of the number of people the exam conversion process will involve, the level of security required, needed training and the wide variety of formats of existing exams.

We understand that exams are key intellectual property of an institution. It is critical that the security of the exams and answer keys be protected. The processes used must prioritize protecting the security of the exams.

Key questions and decision to make in this step:

1. Which LMS will you be converting into?
2. How many exams will be converted?
3. What format are exams currently in?
4. When will exams be provided from the institution to ProctorU?
5. Who will be on the conversion team from the institution?
6. How do you define success for your program?

Step 2: Online Proctoring Set-up

During this step, our Project Manager and Implementation Specialists will meet with your team to determine capacity needs and specific exam directions that need to be considered in the implementation. This step is to ensure your institution is set up for success before rolling out online proctoring to individual faculty for exam uploading.

Key questions and decisions to make in this step:

1. Who from your organization will focus on the online proctoring implementation?
2. What LMS does your institution use?
3. Are your exams already in the LMS? If not, who will be responsible for loading exams?
4. What are your expected testing dates?
5. What is your anticipated volume?
6. How long are your exams?
7. What is the daily exam distribution?
8. What are your institution-wide exam rules? What resources are permitted?

Step 3: Instructor Onboarding and Training

This is where the rubber meets the road. Our implementation specialists and training specialists will assist in the onboarding and training of faculty. This includes integrating your LMS with ProctorU, uploading exams into the proctoring platform, training faculty on how to use the system and providing documentation that can be passed along to test-takers.

Key questions and decisions to make at this step:

1. Do you have a mechanism in place to communicate with instructors?
2. Who will act as the Faculty Liaison at your institution to ensure all instructors are trained and onboarded within the scheduled time frame?
3. What are the exam rules and permitted resources for each course and/or exam?
4. Is there specific information you want to include in our online proctoring training, documentation and/or FAQs that will be provided to faculty?
5. Who at your institution will make decisions about how to handle students who have disabilities or accessibility needs for exams during proctoring? Note that ProctorU has expertise in working with a multitude of accommodations and would be happy to offer guidance.
6. Do faculty understand the reporting suite and how to handle incidents?

Step 4: Test-Taker Readiness

ProctorU's Customer Success Resources will provide test-taker readiness material, instructional videos for how to use the proctoring services, and test it out pages to ensure students are prepared for exam day. Training and communication to students will be a key element to ensure a successful transition to online proctoring.

Key questions and decisions to make at this step:

1. Will the institution send out communication to all students or allow departments and/or individual faculty to handle this on their own?
2. Are there any specific technical concerns faced by students that need to be considered for proctoring?

If you are already a ProctorU partner, we will guide you through the [implementation process](#). You will work closely with our implementation and faculty onboarding teams to ensure your program is successfully launched as quickly as possible.