

Quick Start Guide: Appraiser

Accessing Appraisal Toolkit for Doctors

Appraisal Toolkit for Doctors is a fully online application; once you are registered you can login at <https://appraisals.clarity.co.uk/doctors/toolkit>.

Already registered and have the Appraiser role? Enter your email address and password then click 'Log In'

Login

Email Address

Password

[Forgot your password?](#)

Log In

Forgot your password? Click here to reset

How can we help?

Are you a Doctor or Appraiser?

Start using our Appraisal Toolkit today.

Purchasing on behalf of your Doctors?

Contact our Sales team.

Register your account

Request a quote

New user? Click this button to register, once registered please contact us to have the Appraiser role added to your account

Select the Appraiser role after log in and click on 'Continue'. If you do not have this role option please contact our Customer Support Team.

Select Role

Role

Appraiser

Cancel

Continue

More Info

- You can set up appraisal meeting slots and invite your appraisees.
- You are able to review appraisees current and historic appraisals on submit or once they have granted early access.
- You can edit CPD credits, confirm PDPs and complete appraisal agreements.

Your Homepage

Dr Demo User 1, Appraiser | Log out

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Appraisal Toolkit
for GPs

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Click your name to change your personal details, role, or password

Keep track of how many appraisals you have performed/have left to perform during this appraisal period

Appraiser Dashboard

Total Appraisals	Completed Appraisals	Outstanding Appraisals
0	0	0

Click here to go to your Appraisal Toolkit messages inbox and view your system messages

Messages

(27 unread)

- An Appraisee has submitted their appraisal.
- You have been allocated an appraiser.
- A clinician has submitted their appraisal.

Keep track of your appraisal meetings and available meeting slots or create available meeting slots here

Appraisal Meeting Notices

- 1 Appraisals due in the next 4 weeks with no meeting booked. [Send reminders](#)
- 0 Available slots for appraisees to book. [Create slots](#)

Appraisal Meetings

April 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

● Available Slot
● Booked Appraisal Meeting

This calendar displays your upcoming appraisal meetings. Click the heading to go straight to the Appraisal Meetings section of your account

This table displays any appraisals that:

- Are newly submitted
- You are already appraising
- Are due within the next two months

Current/Upcoming Appraisals

This section lists all appraisals that are incomplete or due within the next two months.

GMC No.	Appraisee	Organisation	Status	Appraisal Date	Due Date	Actions
DEMO002	Dr Demo User 2	CLARITY DEMONSTRATION CCG	Ready To Appraise	19/09/2012	31/03/2013	Appraisal

Displaying items 1 - 1 of 1

Click the drop down to view the appraisal, the appraiser's profile and complete post appraisal feedback (if applicable)

Your Appraisals

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Use the navigation bar to move between your list of Appraisals and your Payment Status page. You can enter your appraiser's payment details for your records on the Payment Status page

Search Appraisals

This section provides you with an overview listing each of your appraisees and their current appraisal status. You can search for individual appraisees by name, GMC No., or appraisal due date using the Search function, and also access your appraisees' personal details and completed appraisals in the table.

Search within results

Search for a specific appraisal using the search function

Filter Results

Update results

For Appraisal Year clear

▼

Has Status clear

- Open
- Entering Evidence
- Submitted By Appraiser
- Appraising in Progress
- Awaiting Appraiser Sign Off
- Complete

Has Early Access Granted? clear

Yes
No

Appraisal ▲	Appraiser
<p>2011 (Complete)</p> <p>At: CLARITY DEMONSTRATION CCG Due: 30/09/2010 Meeting Date: 13/09/2011</p>	<p>✉ Dr Demo User 2 GMC No. DEMO002</p>
<p>2012 (Complete)</p> <p>At: CLARITY DEMONSTRATION CCG Due: 31/07/2011 Meeting Date: 31/07/2011</p>	<p>✉ Dr Demo User 2 GMC No. DEMO002</p>
<p>2013 (Submitted By Appraiser)</p> <p>At: CLARITY DEMONSTRATION CCG Due: 31/03/2013 - 1117 day(s) overdue Meeting Date: 19/09/2012</p>	<p>✉ Dr Demo User 2 GMC No. DEMO002</p>

« 1 »
Displaying items 1 - 3 of 3

This table holds all of your appraisees. Click the appraiser's name to see their details or click on the appraisal to see their submitted appraisal

Completing an Appraisal

All Last Year's PDP items need to be assigned a status, this can be done by clicking 'Open' next to each Last Year's PDP item

The Summary of Discussion, Agreed PDP and Appraiser Statements must be completed. You can access each of these sections via the appraisal Dashboard menu or by clicking 'Sign off' and clicking on the red highlighted messages

4

- 1. Personal Information**
 - + GMC Information
 - Personal Information
 - Qualifications
 - Memberships
- 2. Roles & Responsibilities**
 - Roles
 - Job Plans
 - Last Year's PDP
- 3. Appraisal Information**
 - CPD Events
 - Quality Improvement Activities
 - Significant Events
 - Colleague and Patient Feedback
 - Complaints
 - Compliments
 - Minor Surgery Log
 - Proposed PDP
 - Additional Areas of Discussion
 - Pre-Appraisal
 - GMP Overview
 - Statements and Declarations
 - Additional Information
- 4. Appraisal Summaries**
 - Summary of Discussion
 - Agreed PDP
 - Appraiser Statements
- Actions**
 - Appraisal Meeting
 - Sign Off
 - Revert Submission

Sign Off Appraisal

You can sign off this appraisal once all sections are highlighted in green.

Once you have signed off, your Appraiser will review your input before signing off and completing the appraisal.

● Last Year's PDP

⚠ There are Last Year's PDP items without a status. You must review the PDPs and assign each one a status.

● Summary of Discussion

⚠ You must complete all fields in the Summary of Discussion

● Agreed PDP

⚠ This appraisal does not have any Agreed PDPs. The appraiser should have at least one Agreed PDP per appraisal

● Appraiser Statements

⚠ You have not completed all of the Appraiser Statements

You must resolve all errors marked red before you can sign off this appraisal.

Once all mandatory sections have been completed you can sign off the appraisal. Click 'Sign off' in the Actions section of the appraisal Dashboard menu, then click 'Sign off' at the bottom right of the Sign off page.

Sign Off

Appraisal Meetings

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Home Messages Appraisals Appraisal Meetings

- Upcoming Meetings
- Availability**
- Appraisees without Meeting
- Past Meetings

Available Meeting Slots

Create new available slot

Date	Time Start	Time End
You have not yet created any available meeting slots		

Click this button in the Availability section to create meeting slots ready for your appraisees to book their appraisal meetings

Add New Slot

[Back to List](#)

Date

Time Start Time End

If entering a time manually, please ensure it is in 24 hour format 00:00

Location

Offer Meeting Slot to
 All Appraisees
 Selected Appraisees

Notes

Save

Enter the details for the meeting you would like to create in these boxes. You can offer the slot to all appraisees or selected appraisees

FAQs

I am unable to log in to Appraisal Toolkit, what do I do?

There could be a number of reasons why you are be unable to Log in to Appraisal Toolkit, the most common issues are listed below:

- Incorrect email address/password are being entered
- Typos in the email address/password being entered
- Including spaces at the beginning or end of the email address/password
- Misspelling of the password
- The password is case sensitive – you may not be including the correct uppercase, lowercase, letters, numbers and characters (your password **must** contain seven characters, including at least one number and one special character (? / ! £ \$ % & * \ # @ ~)
- Your account may be locked out - entering the incorrect password 3 times locks an account.

If you have been locked out or are having difficulty with your user credentials, please contact our Customer Support Team on **0191 287 5800**. You will be asked to provide your full name, GMC number and to answer your security question before your password can be reset.

How do I change my email address?

Please contact our Customer Support Team on **0191 287 5800** who will be able to assist in changing your email address over the telephone.

What mandatory information do I need to complete?

As the appraiser it is your responsibility to complete Section 4 of the appraisal evidence, this includes:

- Agreed PDP
- Summary of Discussion
- Appraiser Statements.
- You must also give each of the clinician's 'Last Year's PDPs' a status before you are able to sign off the appraisal.

For further guidance please see our online documentation at <http://wiki.clarity.co.uk/display/1/Appraiser>, contact our Customer Support Team on **0191 287 5800** or email us at doctors@agiliosoftware.com