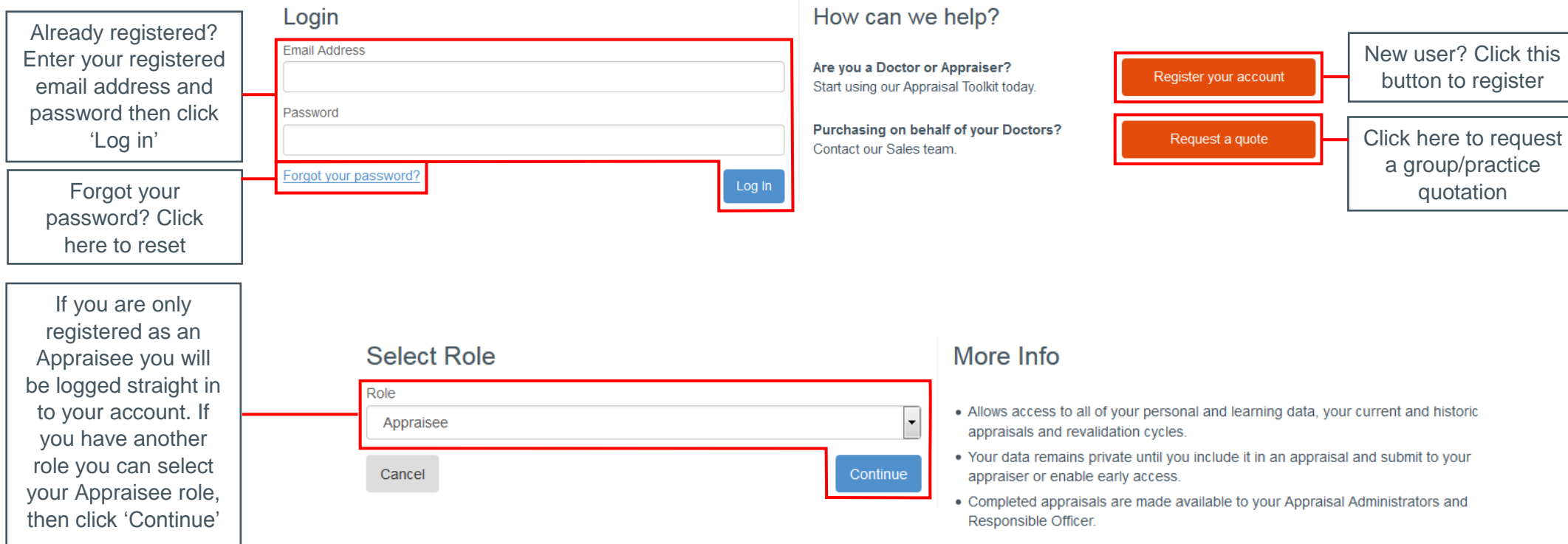# Quick Start Guide: Appraisee

Accessing Appraisal Toolkit for GPs and Hospital Doctors

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

Already registered? Enter your registered email address and password then click 'Log in'

Forgot your password? Click here to reset

Login

Email Address

Password

Forgot your password?

Log In

If you are only registered as an Appraisee you will be logged straight in to your account. If you have another role you can select your Appraisee role, then click 'Continue'

Select Role

Role

Appraisee

Cancel   Continue

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

Click here to request a group/practice quotation

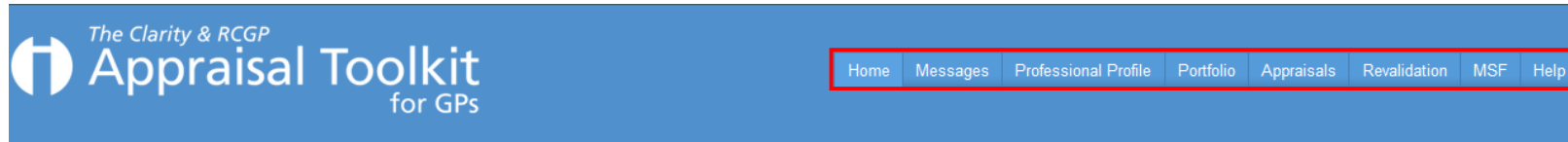### More Info

- Allows access to all of your personal and learning data, your current and historic appraisals and revalidation cycles.
- Your data remains private until you include it in an appraisal and submit to your appraiser or enable early access.
- Completed appraisals are made available to your Appraisal Administrators and Responsible Officer.

Your Homepage

Your Homepage shows your current appraisal details and status timeline and gives quick links to your most recent appraisal messages and your historic appraisals. You can start and access your current appraisal from the Homepage.

Click the headings in the top menu bar to navigate through the Appraisal Toolkit

The Clarity & RCGP Appraisal Toolkit for GPs

Home | Messages | Professional Profile | Portfolio | Appraisals | Revalidation | MSF | Help

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.

Click here to enter your revalidation date

Revalidation

Revalidation due by 15/03/2015

Click these links to access our extensive downloadable user guides and to contact our Customer Support Team through our helpdesk

Additional Resources

▸ Documentation and FAQs
▸ Helpdesk
▸ Useful websites

2013 - CLARITY DEMONSTRATION CCG

Appraiser: *Dr Training User 3*

| Evidence from 01/04/2012 | Evidence to 31/03/2013 | Meeting Book Now | Due before 31/03/2013 |

Keep track of your appraisal evidence and meeting dates

Current Appraisal Status

Open — In Progress — Submitted — Appraising in Progress — Awaiting Your Sign Off — Complete

Go to your Appraisal

Click 'Start your Appraisal' or 'Go to your Appraisal' to access your Appraisal Dashboard

View all Appraisals

To view a full list of your current and historic appraisals click here

Your Professional Profile

The Professional Profile is for you to record your professional information. Information entered into the Professional Profile dated within the current appraisal period will automatically populate in your current appraisal (i.e. date relevant roles, qualifications).

Click the sections in the left navigation menu to move around your Profile

Guidance Notes are available in each section, these include tips about what information to include and why it is important for your appraisal and revalidation. This information is collated from GMC and AORMC guidance

GMC information and Personal details on this page will already be populated from registration. GMC information cannot be amended as this is taken directly from the GMC, if this is incorrect, please contact the GMC directly
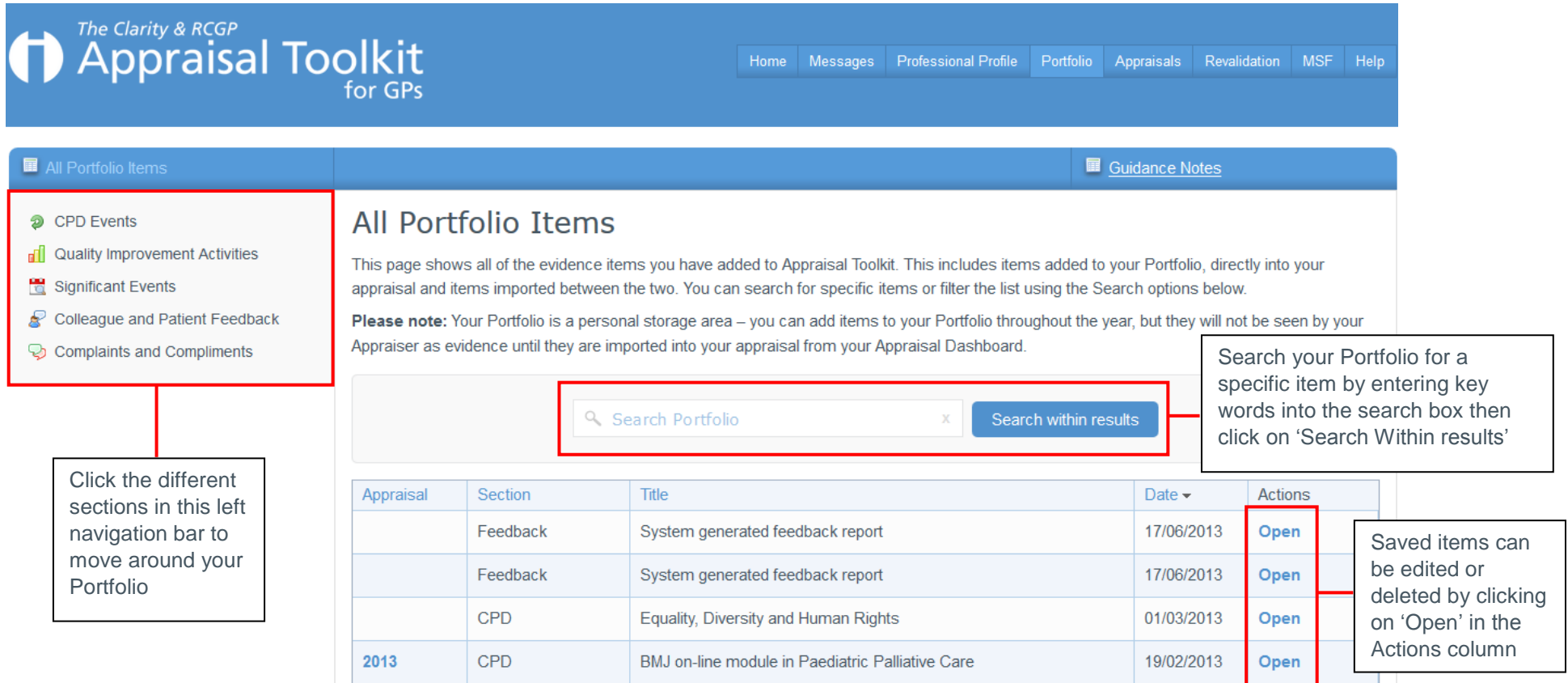
Your Portfolio

The Portfolio is the personal storage area of the Appraisal Toolkit. Evidence entered directly to the Portfolio will only been seen by yourself until you later choose to import into an appraisal.

Note: Items can be imported into an appraisal from the Appraisal Dashboard. Once an item is included in an appraisal it remains in the Portfolio showing the appraisal year in the Appraisal column.

Click the different sections in this left navigation bar to move around your Portfolio

Search your Portfolio for a specific item by entering key words into the search box then click on 'Search Within results'

Saved items can be edited or deleted by clicking on 'Open' in the Actions column

Your Appraisal Dashboard

Your Appraisal Dashboard contains the information you will be submitting to your appraiser. Information entered into section 3 of the appraisal should be new and relevant for the appraisal period you are working on.

Your appraiser's contact details are available for you to view from your dashboard (if your appraiser is assigned)

Click the different sections in this left navigation bar to move around your Appraisal Dashboard

This shows your appraisal timeline. Click 'Show History' to view your entire appraisal history, including any submissions or reversions

Keep track of your total CPD score for this appraisal

Book/amend an appraisal meeting with your appraiser and submit your appraisal evidence

View all documents uploaded to the appraisal, Import from your Portfolio, allow your appraiser, administrator or RO early access to your appraisal evidence, view your Revalidation Progress and download/print versions of your appraisal

Entering evidence

Appraisal evidence can be added to the Appraisal, Portfolio and Professional Profile. Items entered directly into the appraisal will automatically populate in the Portfolio and the Professional Profile.

CPD Events

Use this section to record any CPD Activities you undertake. Evidence should cover your full scope of practice, including any managerial or academic positions you may hold.

Add new item

Title	Type	Date ▾	CPD Score	Documents	
BMJ on-line module in Paediatric Palliative Care	Distance and Online Learning	19/02/2013	4		Open
Child Protection Update	Mandatory Training	04/02/2013	1	Certificate of Attendance	Open
Diabetes BMJ on-line learning modules	Distance and Online Learning	02/10/2012	3		Open
GP Trainer Group Meeting	Peer Learning Group	01/10/2012	2		Open
Emergency Planning Group - 6 weekly	Meetings - Organisation	19/08/2012	2		Open
Appraisal training	Structured Learning	29/04/2012	2		Open

Displaying items 1 - 6 of 6

If this symbol appears in the grid above, it indicates an Appraiser note has been added to this item.

Import (2)

Left navigation menu:

1. Personal Information
- GMC Information
- Personal Information
- Qualifications
- Memberships

2. Roles & Responsibilities
- Roles
- Job Plans
- Last Year's PDP
- Minor Surgery Log

3. Appraisal Information
- CPD Events
- Quality Improvement Activities
- Significant Events
- Colleague and Patient Feedback
- Complaints and Compliments
- Additional Areas of Discussion
- Pre-Appraisal
- Proposed PDP
- GMP Overview
- Statements and Declarations

Details tab form:

Details | GMP Domains | Documents | Reflection | PDP

Title

Select a CPD Type
Please Select...

Date
Should be between 01/04/2012 and 31/03/2013

End Date

Description and Learning

CPD

CPD Score | 0

CPD Credit Hours
0

Planning Hours
0

Save

Annotations:

Once the 'Details' have been saved, click on each of the other tabs along the top menu to add GMP domains, documents, reflection and link to your PDP

Complete the blank fields on the Details tab then click on the 'Save' button at the bottom of the page
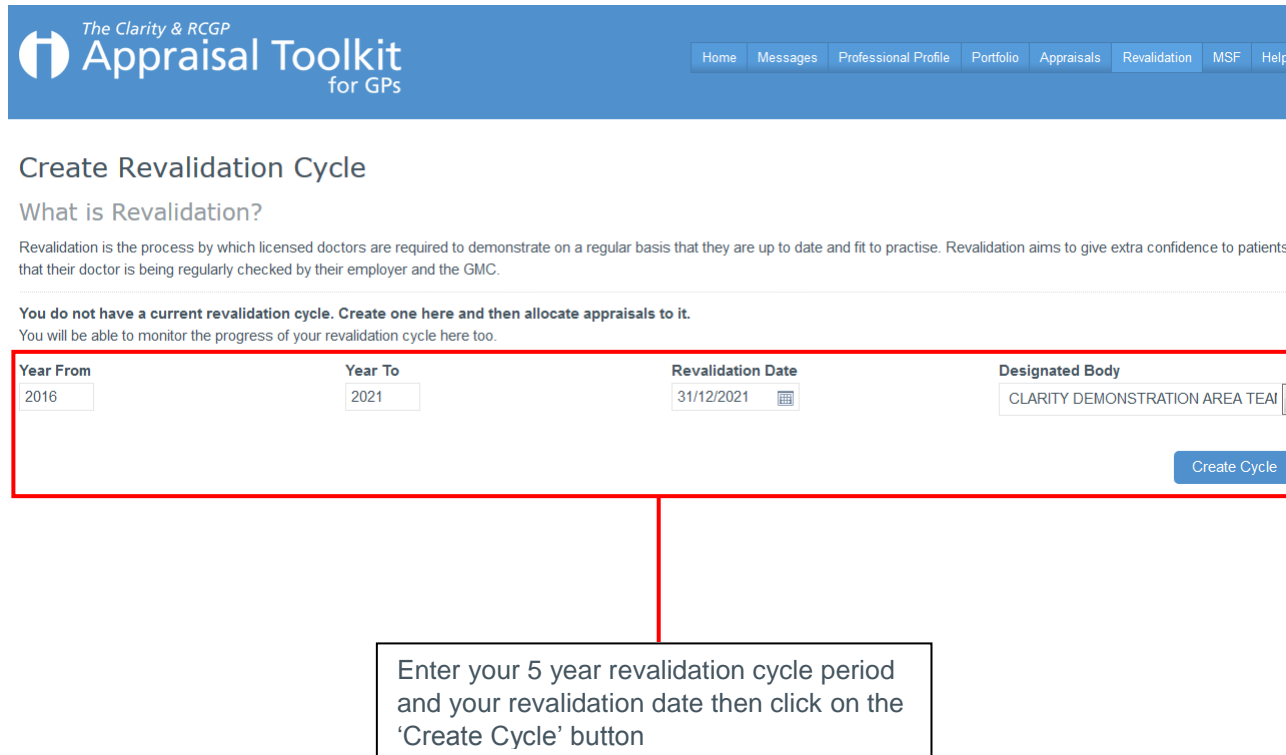
Saved items can be edited or deleted by clicking on 'Edit/Delete' in the Actions column of the table. Documents can also be added or removed when editing

Click on the section you wish to add evidence on the left navigation menu then click the 'Add new item' link at the top left of the table

Your Revalidation

Your Revalidation page allows you to keep track on where you are up to with your Revalidation.

Note: When you first start using Appraisal Toolkit you will need to create a revalidation cycle (see screenshot below).

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The Cycle Status shows how many completed appraisals are assigned to the cycle, CPD points included towards revalidation and if colleague and patient feedback are included

Click 'Change Period' or 'Change date' to change your revalidation period or date

GMC Revalidation Status   *Not set*

⇄ Cycle Status and Options

Cycle Status

0 completed appraisals allocated to this cycle.

● **CPD Score: 0**
*It is recommended that a minimum of **250** CPD Score are accumulated over a revalidation cycle.*

● **Patient Feedback:** At least 1 completed feedback cycle is required.

● **Colleague Feedback:** At least 1 completed feedback cycle is required.

Cycle Options

Revalidation Cycle: 2016 - 2021
⇄ **Change Period**

Revalidation Date: 31/12/2021
🗓 **Change Date**

📋 **Allocate Appraisals**

Click 'Allocate Appraisals' to allocate current, historic or completed appraisals to the cycle

A table will be displayed showing evidence towards revalidation once an appraisal has been completed using Appraisal Toolkit and/or historic appraisals have been allocated with the additional information included

8

FAQs

How do I change my email address/username?

- To change your username/email address, please contact our Customer Support Team on **0845 113 7111.**

The system won't accept my username and/or password, 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:

- Your username is incorrect:
  - Using the wrong email address
  - Typos in the email address
  - Including spaces at the beginning or end of your email address
- Your password is incorrect:
  - Using the wrong password
  - Misspelling your password
  - Your password is case sensitive – you may not be including the correct uppercase, lowercase, letters, numbers and characters (your password **must** contain at least seven characters, including at least one number and one special character (? / ! £ $ % & * \ # @ ~)
- You are locked out:
  - Entering the incorrect password 3 times locks out an account. When the account is locked, an email is generated to the registered email address containing a link to unlock the account.

If you have been locked out or are having difficulty with your user credentials, please contact the Customer Support Team on **0845 113 7111**. You will be asked to provide your full name, GMC number and answer to your security question before your password can be reset.

How do I add PDPs?

The first time you use Appraisal Toolkit you can enter the PDP activities you have been working towards over this appraisal period.

If this is your first appraisal, tick ☐ **This is my first ever appraisal for this organisation.** in the Last Year's PDP section and you will not need to complete the following steps.

To add a new PDP:

- View your current appraisal
- Click 'Last Year's PDP' in section 2 of the left navigation bar
- Click **Add new item**
- Complete each of the tabs and click **Save**

You can link your Portfolio evidence to the PDP in the 'Development Evidence tab – just tick the ☐ **Use My Portfolio** box and select your items.

Can I make amendments to my appraisal after submitting it?

If you have submitted your appraisal but your appraiser has not yet started reviewing it, you can undo your submission by clicking 'Revert Submission' in your left navigation bar. If your appraisal has an 'Appraising in Progress' status, contact your appraiser or administrator and ask them to revert it for you.

For further guidance please see our online documentation at http://wiki.clarity.co.uk , contact our Customer Support Team on **0845 113 7111** or email us at doctors-appraisals-enquiries@clarity.co.uk.