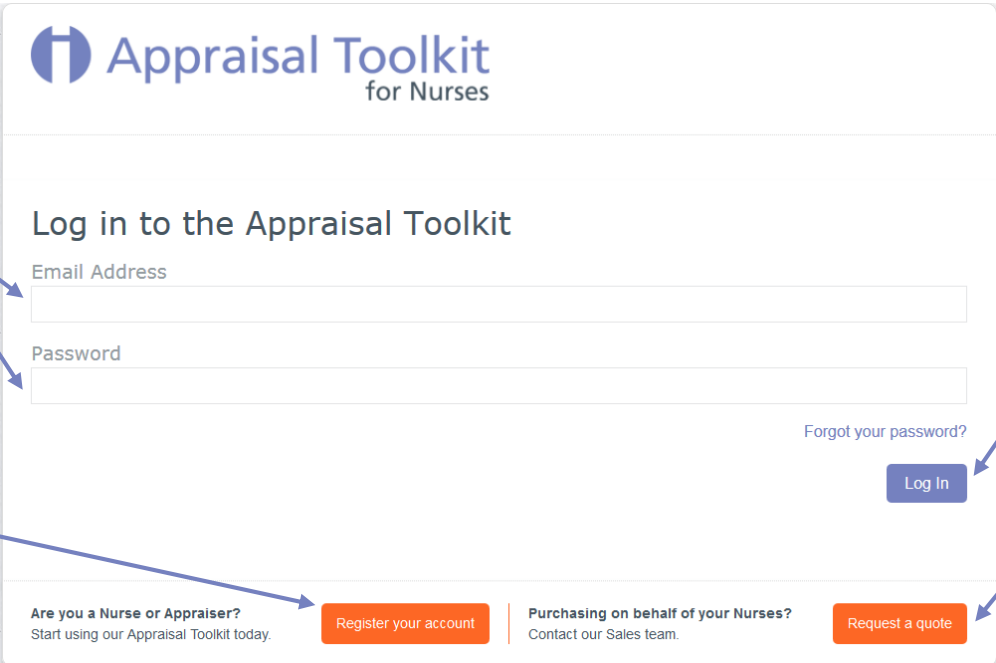


# Quick Start Guide: Nurse Appraiser

## Accessing Appraisal Toolkit for Nurses

Appraisal Toolkit for Nurses is a fully online application; you can register and login at <http://appraisals.clarity.co.uk/nurses/toolkit>. If you would like to access the site as an appraiser, contact our Customer Support Team on **0845 113 7333** or email us at [nurses-appraisals-enquiries@clarity.co.uk](mailto:nurses-appraisals-enquiries@clarity.co.uk).



The screenshot shows the 'Appraisal Toolkit for Nurses' login page. At the top, the logo and title are displayed. Below is the heading 'Log in to the Appraisal Toolkit' followed by input fields for 'Email Address' and 'Password'. A 'Log In' button is positioned to the right of the password field. Below the login section, there are two orange buttons: 'Register your account' and 'Request a quote'. A link for 'Forgot your password?' is also present. A separate window shows a 'Role' dropdown menu with 'Appraiser' selected and 'Continue' and 'Cancel' buttons.

Once registered, enter your registered email address and password here then click the 'Log in' button.

If you are not yet registered, click the 'Register your account' button and complete the registration page.

Forgot your password? Click here to reset.

Click here to request a group or practice quotation.

Once logged in you can select your role as Appraiser and click 'Continue', if you do not have this option please contact our customer support team

# Your Homepage

Demo User 1, Appraiser ▾ [Log out](#)

 Appraisal Toolkit  
for Nurses

[Home](#) [Messages](#) [Appraisals](#) [Appraisal Meetings](#) [Help](#)

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

(17 unread)

- ✉ You have been allocated to perform an appraisal.
- ✉ You have been allocated to perform an appraisal.
- ✉ You have been allocated to perform an appraisal.

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

### Appraisal Meeting Notices

- 4 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.

NMC Pin	Appraisee	Organisation	Status	Appraisal Date	Due Date ▾	Actions
AB123456	Trainee 001	CLARITY DEMONSTRATION AREA TEAM	Ready To Appraise		31/03/2016	<a href="#">Appraisal</a> ▾

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

# Appraisals

Appraisals

## 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, NMC Pin, or appraisal due date using the Search function, and also access your appraisees' personal details and completed appraisals in the table.

Name, Email or NMC Pin

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 Appraisee
- Appraising in Progress
- Awaiting Appraisee Sign Off
- Complete

Has Early Access Granted?

clear

Yes

No

You can filter your search results by appraisal year, appraisal status and whether early access has been granted

Appraisal	Appraisee
<b>2013 (Complete)</b> At: CLARITY DEMONSTRATION CCG Due: 31/03/2013 Meeting Date: 30/12/2012	Demo User 4 NMC Pin DEMO0004
<b>2014 (Appraising in Progress)</b> At: CLARITY DEMONSTRATION CCG Due: 31/03/2014 - 757 day(s) overdue Meeting Date: Not Set	Demo User 4 NMC Pin DEMO0004
<b>2016 (Submitted By Appraisee)</b> At: CLARITY DEMONSTRATION AREA TEAM Due: 31/03/2016 - 26 day(s) overdue Meeting Date: Not Set	Trainee 001 NMC Pin AB123456
<b>2016 (Open)</b> At: CLARITY DEMONSTRATION AREA TEAM Due: 31/03/2016 - 26 day(s) overdue Meeting Date: Not Set	Trainee 002 NMC Pin NOT SET
<b>2016 (Open)</b> At: CLARITY DEMONSTRATION AREA TEAM Due: 31/03/2016 - 26 day(s) overdue Meeting Date: Not Set	Trainee 003 NMC Pin NOT SET

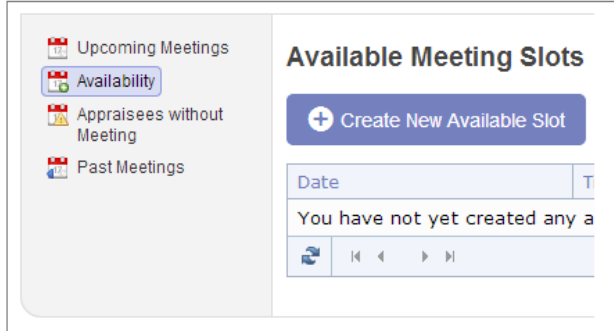
This table holds all of your appraisees. Click 'Appraisee' to see their details or 'Appraisal' to view their submitted appraisal

1

Displaying items 1 - 5 of 5

## Appraisal Meetings

To create a new available meeting slot click on 'Availability' in the left navigation bar then click 'Create New Available Slot'.



### 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 individuals. Click the appropriate circle to select

If a meeting has been booked you can view or edit it. Click 'Upcoming meetings' in the left navigation bar then 'view / edit' next to the meeting to go to the edit screen.

### Appraisal Meeting

[Back to List](#)

<b>Appraiser:</b> Miss Appraiser Clarity	<b>Due Date:</b> 31/12/2013
<b>Email:</b> tutorial1@clarity.co.uk	<b>Telephone:</b> 0845 113 7333
<b>Organisation:</b> Both Care	<b>Revalidation Date:</b> Unknown

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**Current Appraisal Status**

Open — **Entering Evidence** — Ready To Appraise — Appraising in Progress — Awaiting Appraiser Sign Off — Complete

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**SAT**  
**26**  
OCT 2013

**Time:** 09:00 - 10:00 **Location:** My Office

[Suggest New Times](#) [Suggest New Location](#)

Click 'Suggest New Times' or 'Suggest New Location' to change the meeting details. This will send a request to your appraiser who will accept or reject the changes. If they reject the changes they may suggest their own alterations which you can accept or reject

# Completing an Appraisal

Use the left navigation menu to move around the Appraisal.

Last Year's PDP items must be reviewed and given a status

The Appraisal Summaries sections Summary of Discussion, Agreed PDP and Appraiser Statements must be completed before an appraisal can be signed off

Click here to 'Sign Off' the Appraisal or 'Revert Submission' back to the appraiser if they need to make any changes to their Appraisal evidence

The screenshot shows the 'Dashboard' with a left navigation menu. The menu is organized into four main sections:

- 1. Personal Information:** Personal Information, Qualifications, Memberships
- 2. Roles & Responsibilities:** Roles, Job Plans, Last Year's PDP (highlighted), Extended Skills
- 3. Appraisal Information:** CPD Events, Quality Improvement Activities, Serious Untoward Incidents, Feedback, Complaints and Compliments, Additional Areas Of Discussion, Proposed PDP, Six Cs Overview, NMC Code Overview, Statements and Declarations, Additional Information
- 4. Appraisal Summaries:** Summary of Discussion (highlighted), Agreed PDP (highlighted), Appraiser Statements (highlighted)

At the bottom, there is an 'Actions' section with: Appraisal Meeting, Sign Off (highlighted), and Revert Submission.



Appraiser Notes can be added to each section or individual entries by clicking this icon. Notes can be shared with the appraisee or can be private, meaning only you can see them.

Adjust CPD

As an Appraiser you can adjust a Nurse's CPD Hours within CPD Events, Quality Improvement Activities and Serious Untoward Incidents. To adjust their hours open the item you wish to edit and then click on 'Adjust CPD'.

The 'Details' tab shows a 'Status' dropdown menu with 'Please Select...' and a 'Give the reason for the above status' text area.

Click 'Open' next to the last year's PDP item you wish to review, use the tabs across the top of the item to review the evidence. Select a status from the drop down menu in the 'Details' tab. If you select 'Complete' as a status you must enter the completion date. If you select any other status you must enter the reason why.

**Summary of Discussion**  
Use this section to summarise the appraisal meeting. Once the appraisal meeting has taken place you should use this section to record a summary of discussion before signing off the appraisal.

**Agreed PDP**  
In this section you must either accept an appraisee's proposed PDP items or Add Agreed PDP items. Click 'Accept Proposed PDP items' to select the proposed items you are agreeing to. Click 'Add new item' to add a new Agreed PDP item that hasn't been proposed.

**Appraiser Statements**  
Before you sign off the appraisal, you must give answers to a number of statements regarding the appraisal. Read each Statement and select 'agree' or 'disagree'. If you disagree you must explain why.

Accept Proposed PDP items (1)

Once you have had the appraisal meeting and complete the Last Year's PDP, Summary of Discussion, Agreed PDP and Appraiser Statements you can Sign Off the appraisal. Click Sign Off in the left navigation menu and then click 'Sign Off' at the bottom right of the Sign Off overview page.

## FAQs

### How do I change my email address/username?

- To change your username/email address, please contact our Customer Support Team on **0845 113 7333**.

### 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 for Nurses. The most common issues are listed below:

- Your email address 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 of 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, an email is sent to the registered email address when the account locks. Within the email there is a link to unlock your account.

If you have been locked out or are having difficulty with your user credentials, please contact the Customer Support Team on **0845 113 7333**. You will be asked to provide your full name, NMC number and answer to your security question before your password can be reset or account unlocked.

For further guidance please see our online documentation at [Appraisal Toolkit Help](#).

Contact our Customer Support Team on **0845 113 7333** or email us at [nurses-appraisals-enquiries@clarity.co.uk](mailto:nurses-appraisals-enquiries@clarity.co.uk).