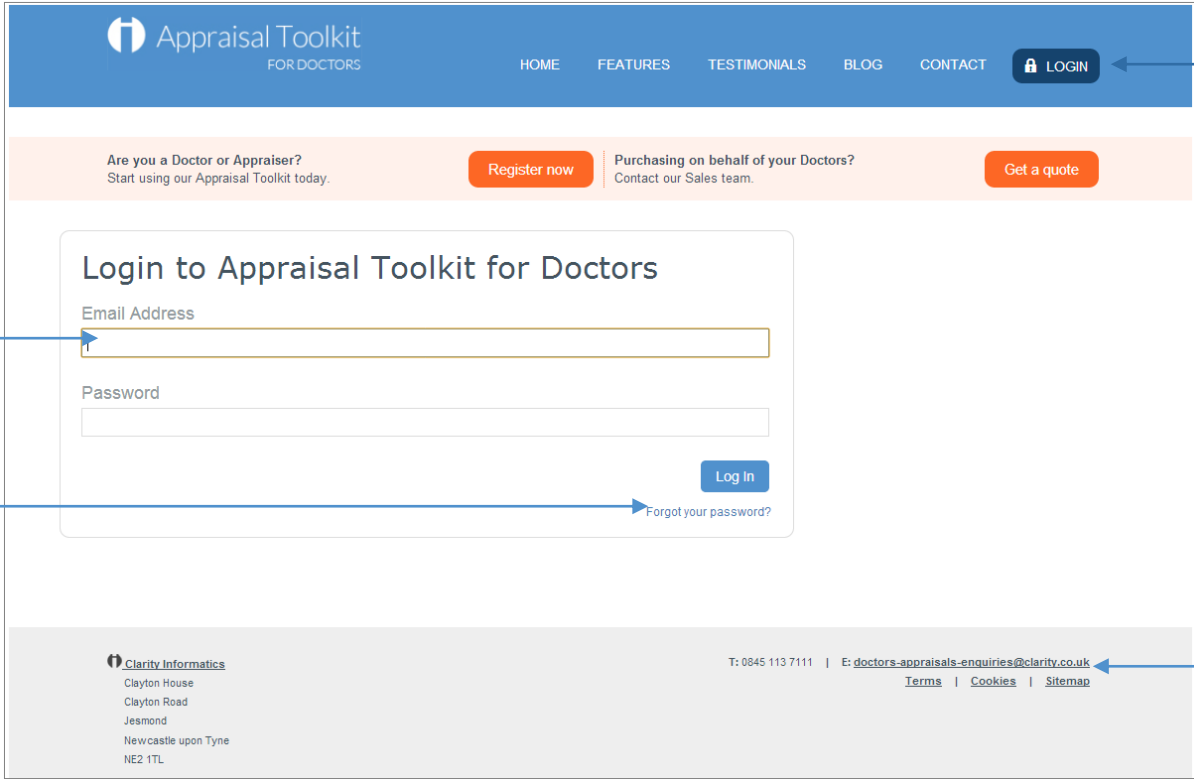


Quick Start Guide: Administrator

Accessing Appraisal Toolkit

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



The screenshot shows the Appraisal Toolkit website interface. At the top, there is a blue navigation bar with the logo and text 'Appraisal Toolkit FOR DOCTORS', and menu items: HOME, FEATURES, TESTIMONIALS, BLOG, CONTACT, and a LOGIN button. Below the navigation bar is a light orange banner with two sections: 'Are you a Doctor or Appraiser? Start using our Appraisal Toolkit today.' with a 'Register now' button, and 'Purchasing on behalf of your Doctors? Contact our Sales team.' with a 'Get a quote' button. The main content area is titled 'Login to Appraisal Toolkit for Doctors' and contains an 'Email Address' input field, a 'Password' input field, a 'Log In' button, and a 'Forgot your password?' link. The footer contains contact information for Clarity Informatics, including address, phone number, and email address, along with links for Terms, Cookies, and Sitemap.

Once you've registered, login to your account with your email address and password

Can't remember your password? Click this link to reset it

Click through this menu for Appraisal Toolkit news and information

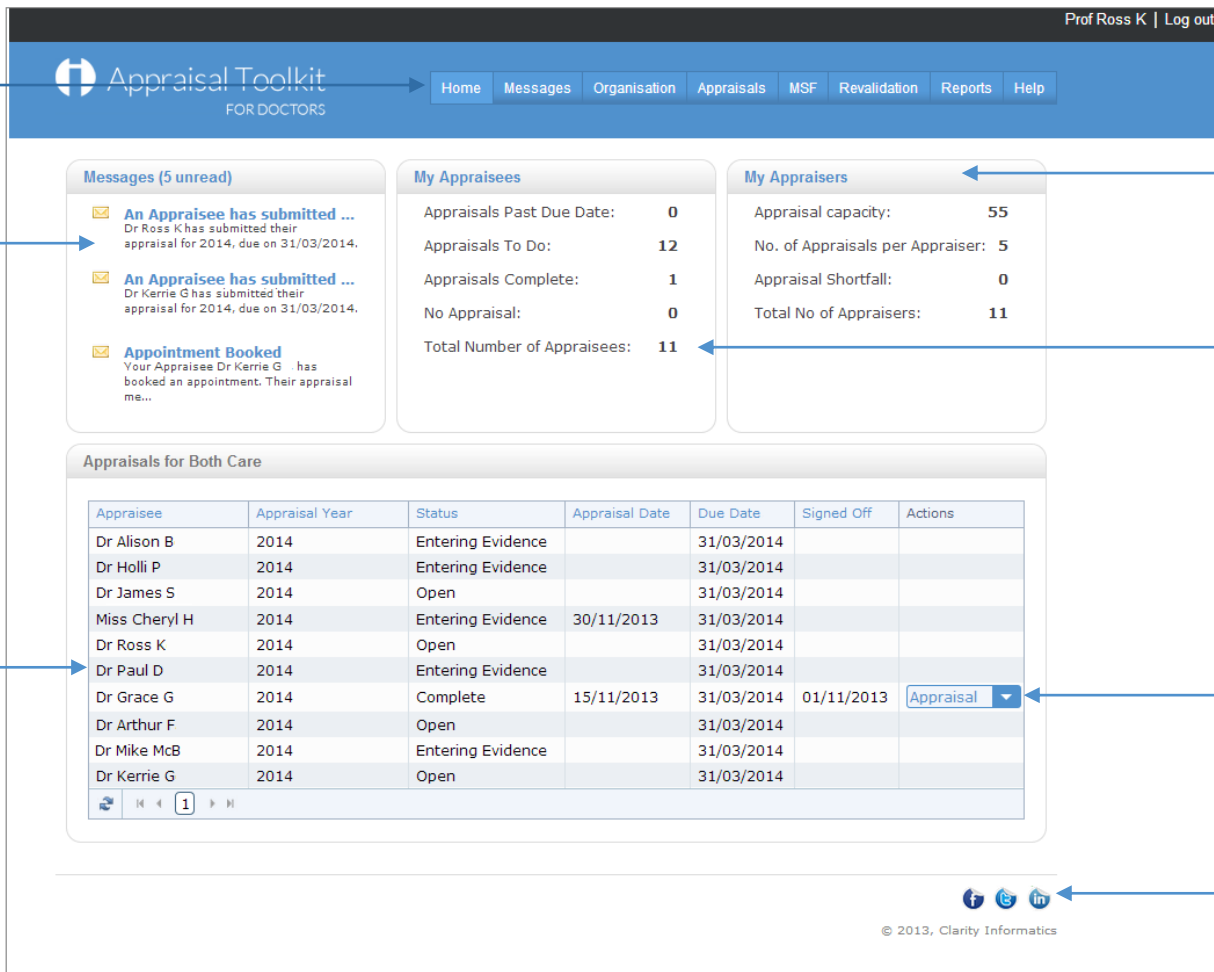
Need to contact us? Use this email address to contact our Customer Support Team directly

Your Homepage

Use this menu to navigate around Appraisal Toolkit

Click the 'Messages' link to go to your Appraisal Toolkit inbox, this contains your system messages and updates on appraisee progress.

This table contains your organisation's appraisals for this year. Sort it alphabetically or by date by clicking the column headers.



Prof Ross K | Log out

Appraisal Toolkit FOR DOCTORS

Home Messages Organisation Appraisals MSF Revalidation Reports Help

Messages (5 unread)

- An Appraisee has submitted ... Dr Ross K has submitted their appraisal for 2014, due on 31/03/2014.
- An Appraisee has submitted ... Dr Kerrie G has submitted their appraisal for 2014, due on 31/03/2014.
- Appointment Booked Your Appraisee Dr Kerrie G has booked an appointment. Their appraisal me...

My Appraisees

- Appraisals Past Due Date: 0
- Appraisals To Do: 12
- Appraisals Complete: 1
- No Appraisal: 0
- Total Number of Appraisees: 11

My Appraisers

- Appraisal capacity: 55
- No. of Appraisals per Appraiser: 5
- Appraisal Shortfall: 0
- Total No of Appraisers: 11

Appraisals for Both Care

Appraisee	Appraisal Year	Status	Appraisal Date	Due Date	Signed Off	Actions
Dr Alison B	2014	Entering Evidence		31/03/2014		
Dr Hollie P	2014	Entering Evidence		31/03/2014		
Dr James S	2014	Open		31/03/2014		
Miss Cheryl H	2014	Entering Evidence	30/11/2013	31/03/2014		
Dr Ross K	2014	Open		31/03/2014		
Dr Paul D	2014	Entering Evidence		31/03/2014		
Dr Grace G	2014	Complete	15/11/2013	31/03/2014	01/11/2013	Appraisal
Dr Arthur F	2014	Open		31/03/2014		
Dr Mike McB	2014	Entering Evidence		31/03/2014		
Dr Kerrie G	2014	Open		31/03/2014		

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

Keep track of your appraisees' and appraisers' activity in these overviews, or click the links to see lists of all of the appraisees or appraisers in your organisation.

Click the arrow to show the drop down menu containing options to view or print the appraisal, or view the appraisee's details.

Click the social media links to follow Clarity on Facebook, Twitter or LinkedIn and find out about updates and news first!

Managing Your Organisation



Click 'Organisation' in the top menu bar top begin managing your organisation, staff and settings.

Assigning Roles

To add registered users to specific role, click 'Add User' in the left navigation bar then search for their name. Click the 'Add' link then select their role (e.g. appraisee or appraiser).

The screenshot shows the 'Add User' interface. On the left is a navigation sidebar with 'Add User' selected. The main content area has a search bar with the placeholder text 'Search by Name, Email or GMC No.' and a 'Search' button. Below the search bar is a table with columns 'Name', 'GMC No.', and 'Actions'. The table currently displays 'No records to display.' and a pagination bar at the bottom indicates 'Displaying items 0 - 0 of 0'.

The screenshot shows the 'Manage Departments' interface. On the left is a navigation sidebar with 'Manage Departments' selected. The main content area has a form with a text input labeled 'Add Department Name' and an 'Add Department' button. Below this is a table titled 'Existing Departments' with columns 'Department Name' and 'Actions'. The table lists 'Department 1' and 'Department 2', each with a 'Manage' dropdown menu. A pagination bar at the bottom indicates 'Displaying items 1 - 2 of 2'.

Departments

You can separate your staff into departments. Click 'Manage Departments' in the left navigation bar, add departments using the add function at the top of the page, then click the 'Manage' link to begin assigning your appraisees.

Organisation Settings

Which settings would you like to configure?

Appraisal Configuration [View options](#)

Change settings linked directly to appraisals within your organisation.

Optional Appraisal Features [View options](#)

Enable and disable appraisal features to meet your organisation's requirements.

MSF Settings [View options](#)

Adjust settings to change how MSF is managed within your organisation.

Organisation Settings

You can edit your organisation's settings to conform to local policies; simply click 'Settings' in your left navigation bar, then click 'View Options' next to each setting type. Appraisal Toolkit provides a number of optional features and MSF settings for you to edit, along with fully configurable appraisal process allowing you to personalise how evidence is collected, whether Appraisal Toolkit automatically assigns appraisal due dates, how many times an appraiser can appraise an individual, and more.

Managing Appraisals

Home Messages Organisation **Appraisals** MSF Revalidation Reports Help

Click 'Appraisals' in the top menu bar top begin managing your organisation's appraisals, exemptions and conflicts.

Exemptions

If you have any appraisees who are exempt from an appraisal (e.g. for maternity leave or long term sickness) you can add this information into the exemptions section.

Exemptions

The Exemptions section highlights appraisees and appraisers who are exempted from beginning a new appraisal such as those that are on maternity leave and those that are on long term sickness.

[Add Exemption](#)

Appraiser	Reason	From	Until	Actions
No records to display.				
Displaying items 0 - 0 of 0				

Batch Allocate Appraisers

Suggested Appraiser Matches

Warning: The matched Appraisers, represented below, will be responsible for performing the appraisals for each Appraisee they are matched to.

If you wish to continue and view our suggested matching of Appraisers to Appraisees, please click 'Suggest Matches' below.

[Suggest matches](#)

Allocating Appraisal Dates and Appraisers

Click 'Allocate Due Dates' in the left navigation bar to automatically allocate due dates to multiple appraisees. You can then allocate multiple appraisers by clicking 'Batch Allocate Appraisers' then 'Suggest Matches'.

Reverting

As an administrator you can revert the statuses of your appraisees' appraisals if they (or their appraiser) need to edit information after submitting or signing off the appraisal. Click the appropriate link in the left navigation bar to find the appraisal and revert it.

Revert Appraiser Sign Off

Use this action to change the status of an appraisal from 'Awaiting Appraiser Sign Off' to 'Appraising in Progress'. This will allow the Appraiser to add or edit any information they provided for the appraisal, they will then have to sign off the appraisal once amendments are completed and the normal process will continue.

Note: Both the Appraiser and Appraiser will be informed of the change by a system message.

Appraiser	Year	Appraiser	Due Date ▲	Actions
No records to display.				

Displaying items 0 - 0 of 0

Multi-Source Feedback



Click 'MSF' in the top menu bar to see your organisation's MSF progress, including benchmarks and individual results.

MSF Cycles

Click the 'View' link to see your appraisee's cycle. If it is not yet complete you can send email feedback requests to colleagues or patients on behalf of the clinician.

Once the cycle is complete you can also view the cycle results and any relevant benchmarks (specialty, organisation and national).

Multi-Source Feedback Overview

Benchmarks

There are no benchmarks available to view. Your organisation must have a minimum of 10 completed patient cycles/10 completed colleague cycles before benchmarked data can be made available.

Supporting Information

For a detailed explanation of the calculations used in the benchmarks, read our [Benchmarking Calculation Guide](#).

For information on interpreting benchmarked results, read our [information document](#) for Appraisal Administrators and Responsible Officers.

Appraisees

Appraisees are required to collect feedback from their patients and colleagues as part of their appraisal.

This section allows you to view the appraisees' feedback results, their completed self assessment questionnaires and any additional comments that are made about them by their patients or colleagues.

Appraiser	Type	Ref	Date Started	% Complete	Self Assess.	Marked as Complete	
Miss Nicole S	Colleague	CLA4-9999999-C001	24/10/2013	0	<input type="checkbox"/>	<input type="checkbox"/>	View

Displaying items 1 - 1 of 1

FAQS

An appraisee's appraisal is marked as 'Submitted' – why can't I view it?

Appraisal management can only view an appraisal once it is marked as 'Complete'. Until an appraisal is completed, the appraisee and their appraisers can adjust the appraisal as they see fit to ensure inclusion of all the necessary information.

How do I remove a user from my organisation?

To remove a user from your organisation, click 'Organisation' in the top menu. Click their role in the left navigation bar, find the user and click the arrow next to their name to bring up the drop down menu. Click the 'Remove' link to go to the Remove User page.

I have access to multiple organisations, do I have to log out and back in every time I want to swap between them?

No! To swap between your roles/organisations simply click your name in the top right corner. This will take you to your account details page. Click the 'Change active role' button in the top right corner and select the organisation you want to change to.

How do I enable Paper MSF for my organisation?

You can enable paper MSF and purchase packs for your appraisees in the Organisation Settings section (see page 4 for more details). Click 'MSF Settings', then 'Enable' next to Paper-based MSF.

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.