Responsible Officer's Quick Start Guide

LOGGING IN TO APPRAISAL TOOLKIT

Appraisal Toolkit is an online application; you can login at https://appraisals.clarity.co.uk

Returning Users:

If you are a returning Responsible Officer who has already moved from the old Appraisal Toolkit, you do not need to register. Enter your login details into the sign in page and will be able to access the new Appraisal Toolkit. If you are an old Appraisal Toolkit user who has not yet been confirmed as transferred, please contact our Customer Support Team on **0845 113 7111** to arrange your migration.

New Users:

If you have never used Appraisal Toolkit before, you will need to register before you can access the application.

If your organisation has arranged for you to register, you will receive an email asking you to complete and confirm your registration details. Once this has been done, you will be able to log in as normal.
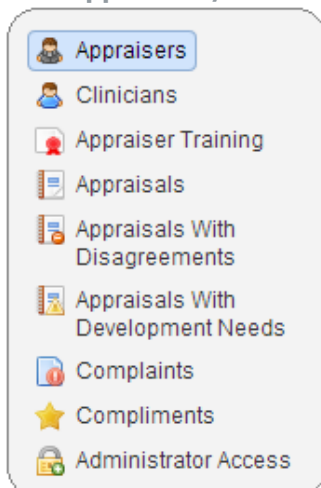
VIEWING APPRAISER/APPRAISEE INFORMATION

To view personal information (including Personal Details, GMC Number, Current Appraisals, Conflicts of Interest, Historic appraisals and Appraiser Training) for an individual registered within your organisation:

1. Click **Organisation** in the top menu
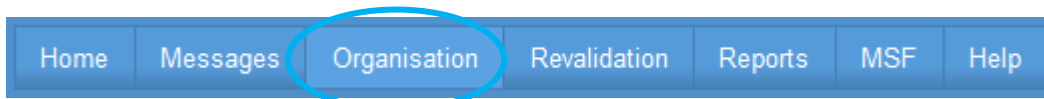
2. Click **Appraisers/Clinicians** in the left navigation bar

3. You can enter the users name into the search box or click **show more options** to search by GMC number or email address.

4. Click the View link to the right of the individuals name

5. Select the Current Appraisals, Conflicts, Historic appraisals or Appraiser Training tab (depending on which details you would like to view)
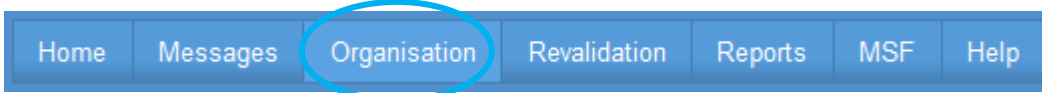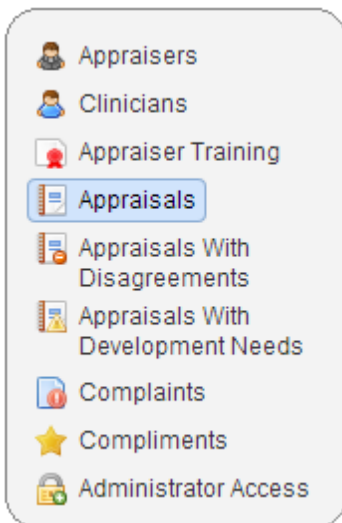

VIEWING APPRAISALS

To view a list of all of the historic and current appraisals from your organisation:

1. Click **Organisation** on the top menu

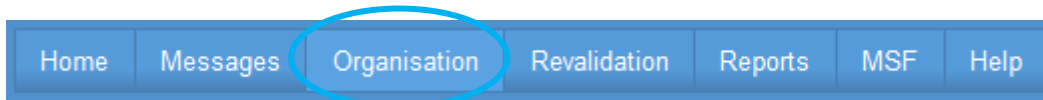2. Click **Appraisals** in the left navigation bar

3. Click the table headings to sort the appraisals. You can sort appraisals alphabetically according to clinician or appraiser, by year or due date and by status.

4. If an appraisal status is 'Complete', you can view it by clicking **View** in the Actions column.

5. You can Search by entering the clinician's name into the search box or by appraiser name, clinician/appraiser GMC number or appraisal due date by clicking **Show More Options.**
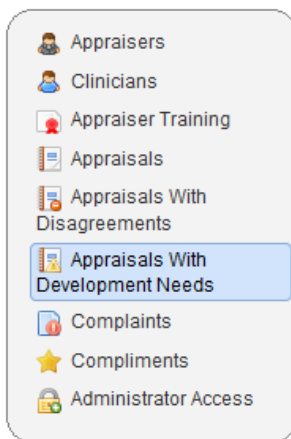

VIEWING APPRAISALS WITH DEVELOPMENT NEEDS

To view a list of appraisals with low appraisal assessments which need to be addressed:

1. Click **Organisation** on the top menu

2. Click **Appraisals with Development Needs** in the left navigation bar

3. To sort the appraisals, click on the table headings. You can sort appraisals alphabetically according to clinician or appraiser, by year or due date and by status

4. You can view an appraisal by clicking the **View** link to the right of the item.
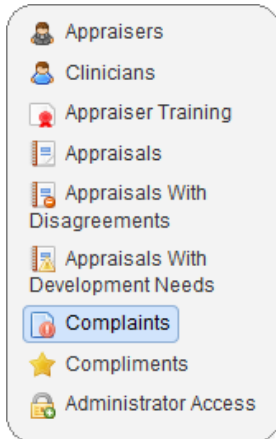
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VIEWING COMPLAINTS AND COMPLIMENTS

1. Click **Organisation** on the top menu

2. Click **Complaints** (or **Compliments**) in the left navigation bar

3. You can sort the items according to date received, clinician and title by clicking on the table headings

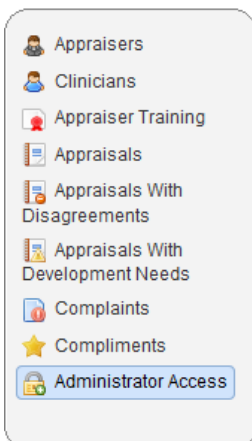4. To view an item, click the **View** link to the right of the item.

GRANTING/RESTRICTING ADMINISTRATOR ACCESS TO APPRAISALS

To allow or deny your organisation's Appraisal Administrators access to the details of appraisals:

1. Click **Organisation** on the top menu

2. Click **Administrator Access** in the left navigation bar

APPRAISAL TOOLKIT

3. To allow access right, tick the box in the Access Appraisals column next to administrator's name.
    To remove access, un-tick the box.

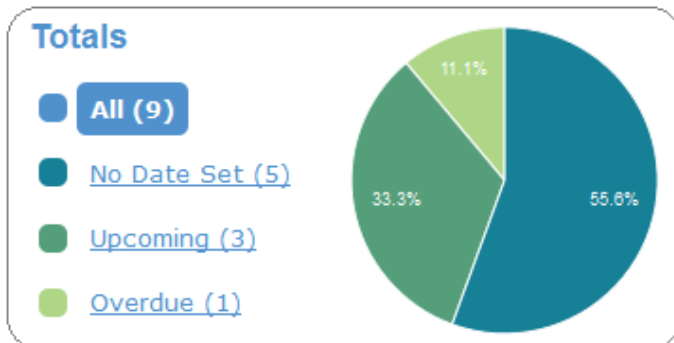| Access Appraisals		Access Appraisals
☑		☐
Access Granted		Access Denied

4. Click [Save]

REVALIDATION PROGRESS

To see your organisation's revalidation progress:

1. Click "Revalidation" in the top menu

| Home | Messages | Organisation | Revalidation | Reports | MSF | Help |

2. Your organisation's revalidation statistics are shown in the pie chart

Totals
- All (9)
- No Date Set (5)
- Upcoming (3)
- Overdue (1)

11.1%
33.3%
55.6%

3. Click View to see the revalidation information for an individual Clinician; including a table
    showing the number of items of each evidence type contained in each strengthened appraisal,
    any missing evidence that is mandatory for revalidation and the Appraiser details.

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