



# Administrator's Quick Start Guide

## REQUESTING AN ADMINISTRATOR ACCOUNT

If you require a new administrator account to be set up on the Appraisal Toolkit, email our support team at [appraisals-support@clarity.co.uk](mailto:appraisals-support@clarity.co.uk) with the following details: User's name, organisation and email address.

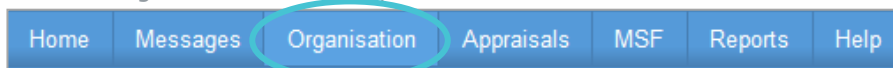
## LOGGING ON TO APPRAISAL TOOLKIT

Appraisal Toolkit is an online application; you can login at <https://appraisals.clarity.co.uk> using your registered email address and password.

## ENTERING YOUR ORGANISATION'S CONTACT DETAILS

To add details for your organisation including email address, telephone number and website address:

1. Click on Organisation on the top menu



2. Complete the available fields where required and 

### Edit Organisation

**Organisation Name**


**Organisation Email**

**Organisation Telephone**

**Appraisal Admin Email**

**Appraisal Office Telephone**

**Website**



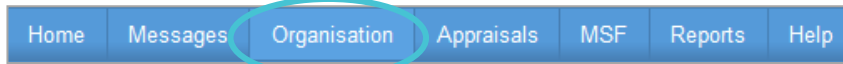


## ADDING NEW STAFF – CLINICIANS AND APPRAISERS

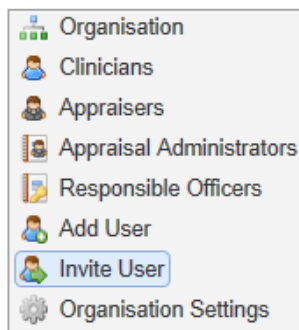
With administrator access you can invite staff to register for Appraisal Toolkit. Invites should only be sent to individuals who have never used Clarity’s Appraisal Toolkit. If an individual is already using the old toolkit but has not yet moved to the new Appraisal Toolkit, contact our customer Support Team on **0845 113 7111** or [appraisals-support@clarity.co.uk](mailto:appraisals-support@clarity.co.uk) who will arrange for any existing users and data to be migrated.

To invite a new user:

1. Click on Organisation on the top menu



2. Click the **Invite User** link in the left navigation menu



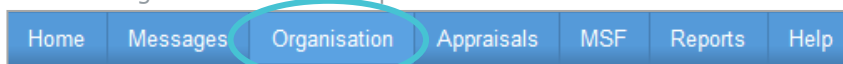
3. Complete the email address, recipient name and personalised message fields and click

**Send**

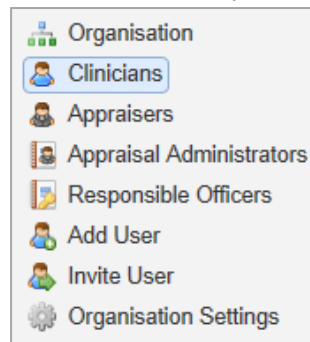
An email containing a link to the registration page will be sent to the invitee. Once new users have completed the registration process they will be available on your organisation list for you to assign their roles and appraisals as necessary.

## VIEWING YOUR CLINICIANS AND APPRAISERS

1. Click on Organisation on the top menu



2. Select Clinicians or Appraisers from the left navigation menu to view a list of users with the chosen role within your organisation



3. To view an individual (including any completed appraisals), click the **View** link to the right of their name

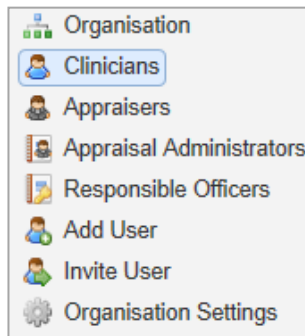


## ASSIGNING ROLES

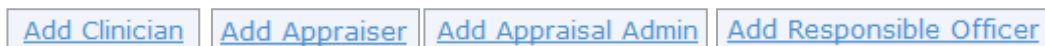
1. Click on Organisation on the top menu



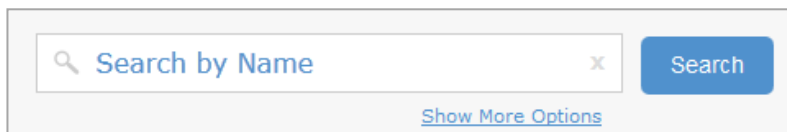
2. Click on either Clinician, Appraiser, Appraisal Administrator or Responsible Officer, depending on the role you wish to add



3. Click on the Add link above the list of users



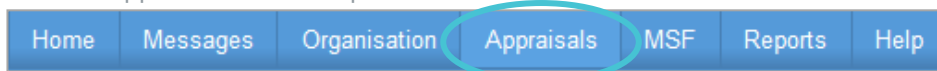
4. Enter the users name into the search box or click **Show More Options** to search by GMC number or email address.



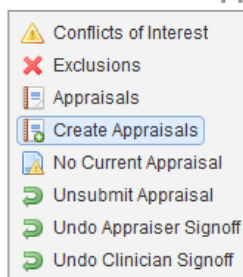
5. From your search results click on the **Add** link in the view column and the user will be added to the chosen role within your organisation

## BATCH APPRAISAL CREATION

1. Click on Appraisals on the top menu



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



3. Select the appraisal year from the drop down menu



**Appraisal Year Ending**

2013 ▼

**Start**

4. Click on the Start button

Created   Already Has Appraisal   No Due Date   Excluded

Clinician	Due Date
Prof Ross Kemp	30/09/2012
Admin Admin	31/03/2013

« ‹ 1 › »      Displaying items 1 - 2 of 2

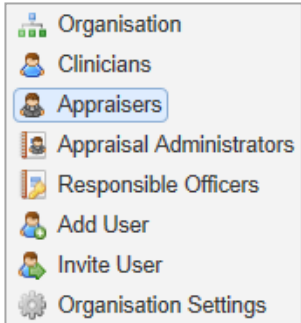
All clinicians without an appraisal for the chosen year will have an appraisal created. Click on the appropriate tabs to view clinician's who already had an appraisal allocated, who have been excluded and those without an appraisal due date.

### ALLOCATING APPRAISERS TO MULTIPLE CLINICIANS

1. Click on Organisation on the top menu



2. Click on **Appraisers** on the left navigation menu



3. Click on the [View](#) link to the left of the chosen appraiser

4. Click on **Match Clinicians for Appraisal** above the list of current appraisals

0 Total Appraisals   0 Completed Appraisals   0 Outstanding Appraisals

Current Appraisals   Conflicts   Historic Appraisals   Appraiser Training

[Match Clinicians For Appraisal](#)

Clinician	Status	Due Date	Appraisal Date	Complete Date
No records to display.				

« ‹ 1 › »      Displaying items 0 - 0 of 0



5. Select the tick boxes on the right of clinicians to be appraised by the chosen appraiser

Clinician	GMC No	Due Date	
Mr. James Stephenson	NOT SET	31/03/2012	<input checked="" type="checkbox"/>
Mr. James Stephenson	NOT SET	31/03/2013	<input checked="" type="checkbox"/>
Mr. James Stephenson	NOT SET	31/03/2013	<input checked="" type="checkbox"/>

1      Displaying items 1 - 3 of 3

6. Click [Match](#) to allocate the appraiser to the selected clinicians