



# 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 Services Team on 0845 113 7111 to arrange your migration.

### New Users:

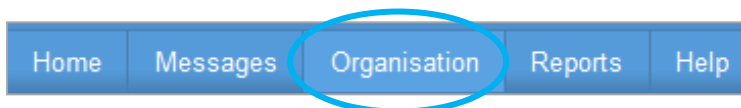
If you have never used the Appraisal Toolkit before, you will need to register before you can access the application.

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.

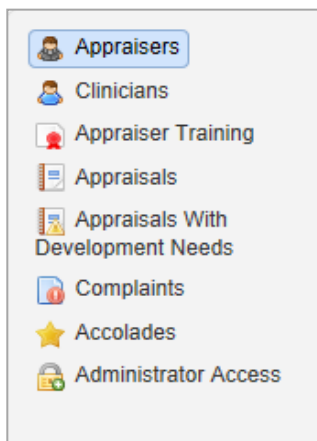
## VIEWING APPRAISER/APPRAISEE INFORMATION

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 on **Organisation** in the top menu



2. Select **Appraisers/Clinicians** from the left navigation menu





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

Search

[Show More Options](#)

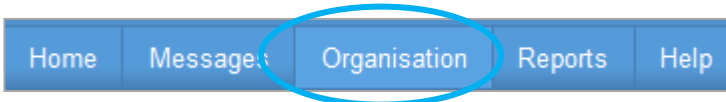
4. Click on the [View](#) link to the right of the individuals name
5. Select the Current Appraisals, Conflicts, Historic appraisals or Appraiser Training tab (depending on which details you would like to view)

Current Appraisals	Conflicts	Historic Appraisals	Appraiser Training										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Clinician</th> <th style="width: 20%;">Appraisal Status</th> <th style="width: 20%;">Due Date ▼</th> <th style="width: 20%;">Appraisal Date</th> <th style="width: 20%;">Complete Date</th> </tr> </thead> <tbody> <tr> <td>Dr Demo User2</td> <td>Entering Evidence</td> <td>31/03/2013</td> <td>19/09/2012</td> <td></td> </tr> </tbody> </table>	Clinician	Appraisal Status	Due Date ▼	Appraisal Date	Complete Date	Dr Demo User2	Entering Evidence	31/03/2013	19/09/2012				
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Dr Demo User2	Entering Evidence	31/03/2013	19/09/2012										
<span>«</span> <span>1</span> <span>»</span>				Displaying items 1 - 1 of 1									

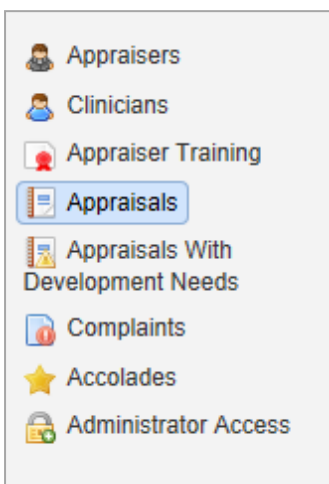
## VIEWING APPRAISALS

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

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



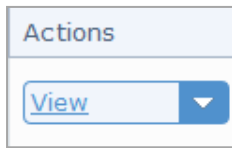
2. Click **Appraisals** from the left navigation menu



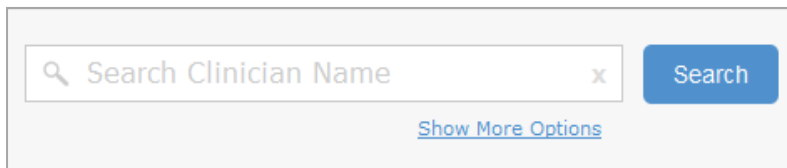
3. To sort the appraisals, click on the table headings. You can sort appraisals alphabetically according to clinician or appraiser, by year or due date and by status.



4. If an appraisal status is 'Complete', you can view it by clicking on the **View** link in the Actions column. (You cannot view 'Open' appraisals).



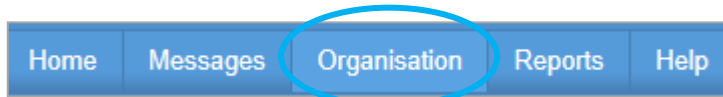
5. You can Search by entering the clinician's name into the search box or by appraiser name, clinician/appraiser GMC number or appraisal due date by clicking on the **Show More Options** link



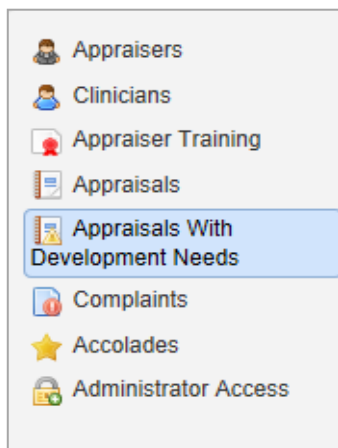
## VIEWING APPRAISALS WITH DEVELOPMENT NEEDS

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

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



2. Click on **Appraisals with Development Needs** from the left navigation menu

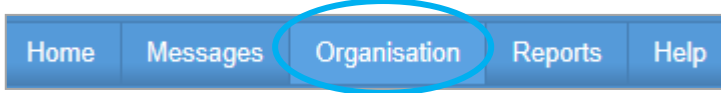


3. To sort the appraisals, click on the table headings. You can sort appraisals alphabetically according to clinician or appraiser, by year or due date and by status
4. You can view an appraisal by clicking the [View](#) link to the right of the item.

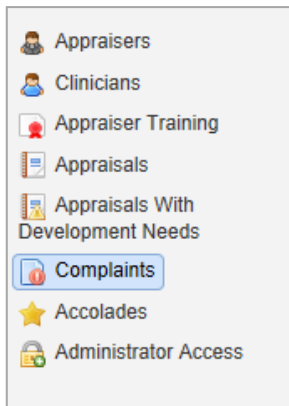


## VIEWING COMPLAINTS AND ACCOLADES

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



2. Click **Complaints** (or **Accolades**) in the left navigation menu

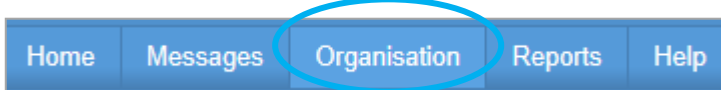


3. You can sort the items according to date received, clinician and title by clicking on the table headings
4. To view an item, click the [View](#) link to the right of the item.

## 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 menu



-  Appraisers
-  Clinicians
-  Appraiser Training
-  Appraisals
-  Appraisals With Development Needs
-  Complaints
-  Accolades
-  Administrator Access

- 3.
4. 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
<input checked="" type="checkbox"/>

Access Granted

Access Appraisals
<input type="checkbox"/>

Access Denied

5. Click [Save](#)