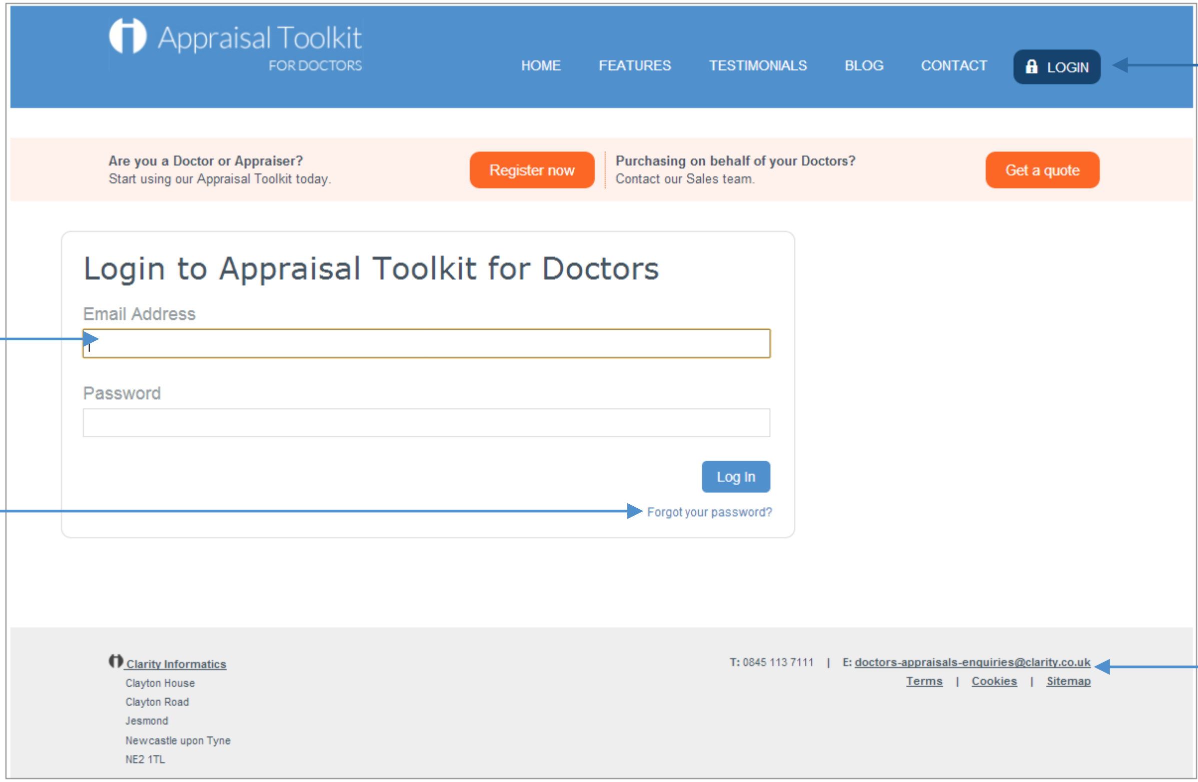
Quick Start Guide: Administrator

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.



Click through this menu for Appraisal Toolkit news and information

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

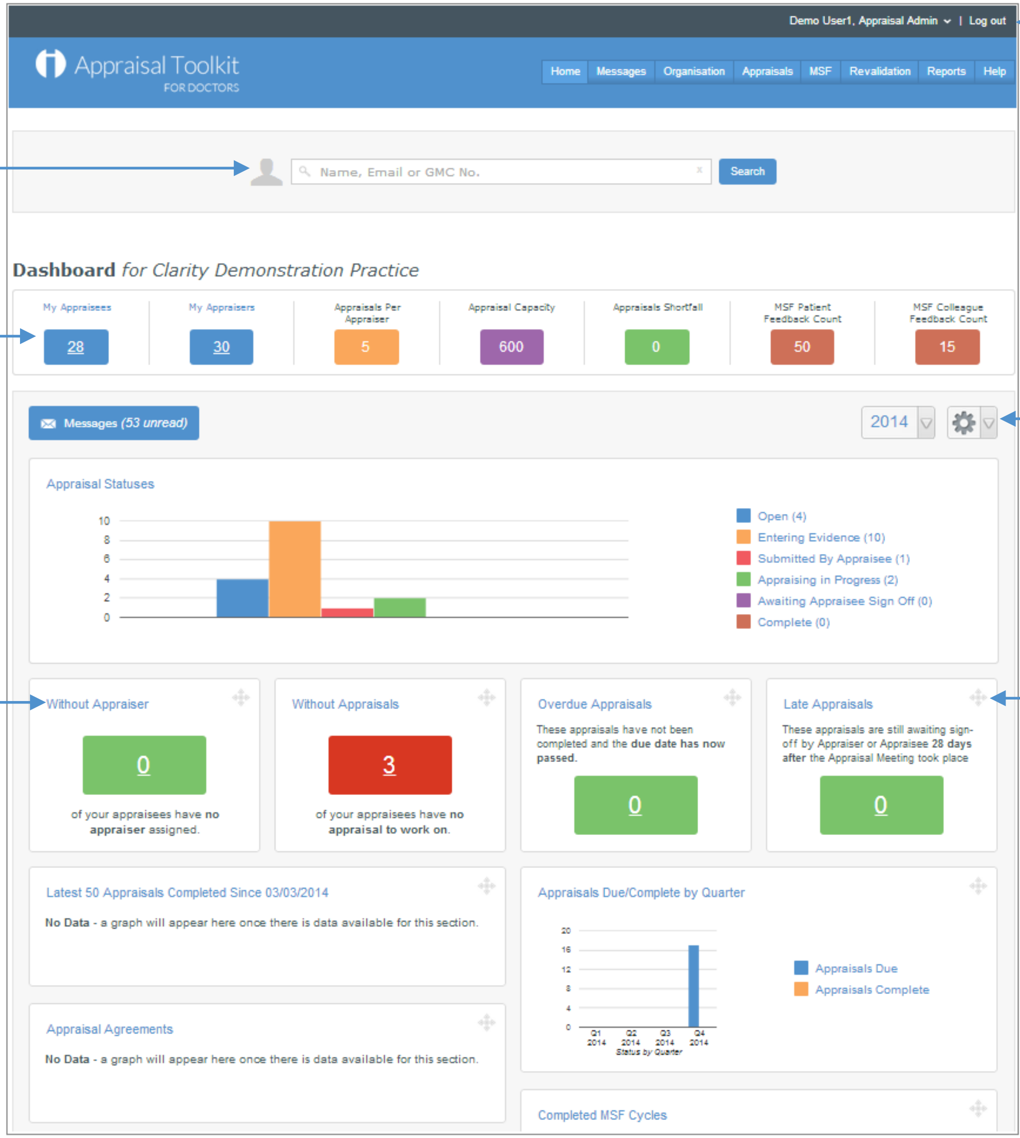
Need to contact us? Use this email address to contact our Customer Support Team directly

Your Dashboard

Enter a name, email, or GMC number to search for a user in your organisation

These widgets show vital statistics for your organisation. Use them to monitor your appraisees and appraisers

Click the blue links in each widget to view more detailed information about each section

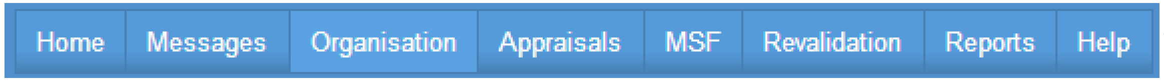


Click your name to change your personal information or change role/organisation

Click this arrow to reset your widgets to the default order, or click the arrow on the left to change the information displayed according to year

Click and drag widgets with the arrows at the top to move them around your page and re-order them as you'd like

Managing Your Organisation



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

Inviting Users

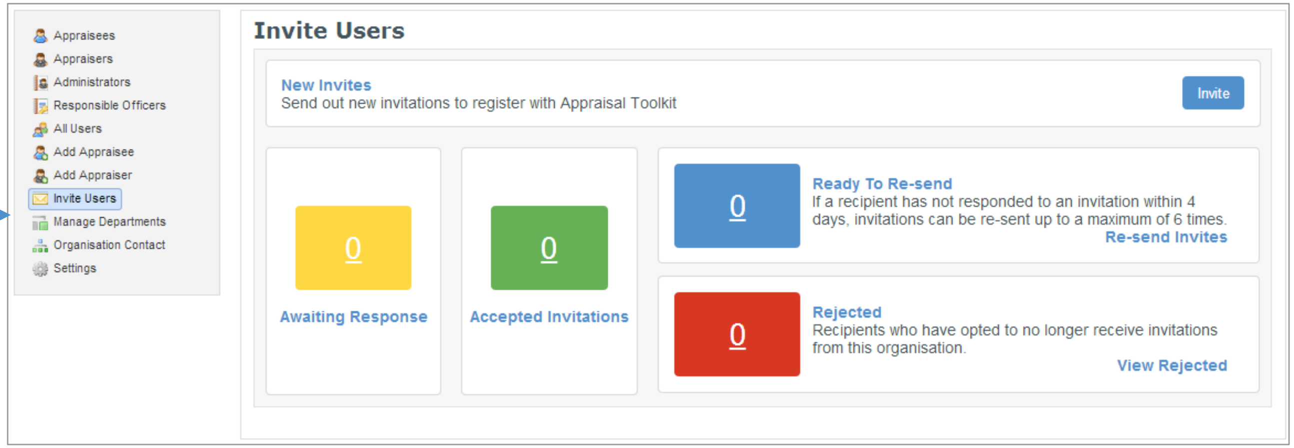
The Invite Users screen allows you to invite staff to join your organisation in Appraisal Toolkit, monitor the responses to your invitations and resend invitations to non-responsive recipients.

Click Invite Users in the left navigation bar to begin inviting users.

Click the ‘Invite’ button, enter the email addresses of the staff you want to invite, then click ‘Send’.

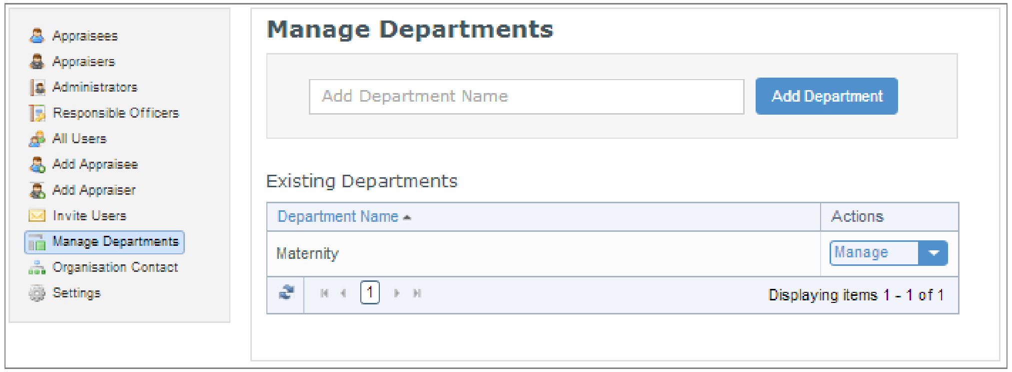
Recipients have the option to reject an invitation. They will no longer receive emails from Appraisal Toolkit and would need to register themselves without an invitation in the future should they choose to.

You can view a list of recipients that have rejected their invitations by clicking ‘View Rejected’.



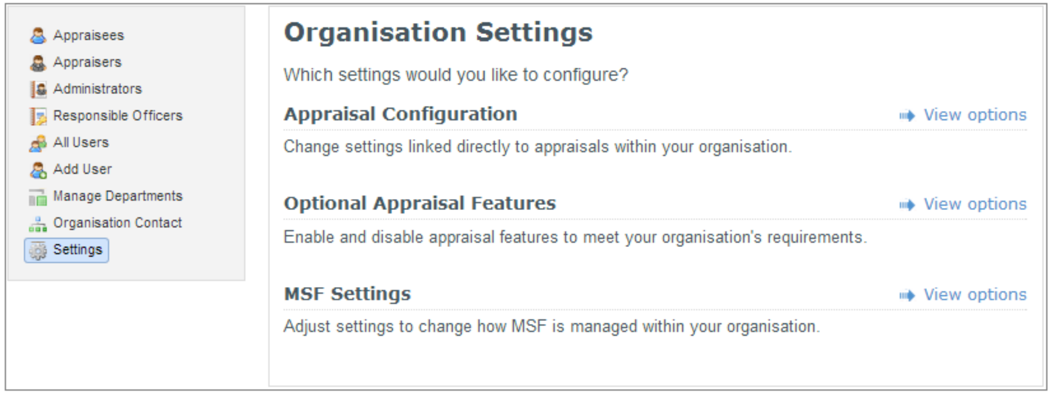
Assigning Roles

To add registered users to specific role, click ‘Add Appraisee’ or ‘Add Appraiser’ in the left navigation bar then search for their name. Click the ‘Add’ link to assign the role to the user



Departments

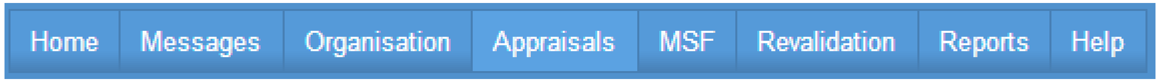
You can separate your staff into departments. Click ‘Manage Departments’ in the left navigation bar, add departments using the add function at the top of the page, then click the ‘Manage’ link to begin assigning your appraisees.



Organisation Settings

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

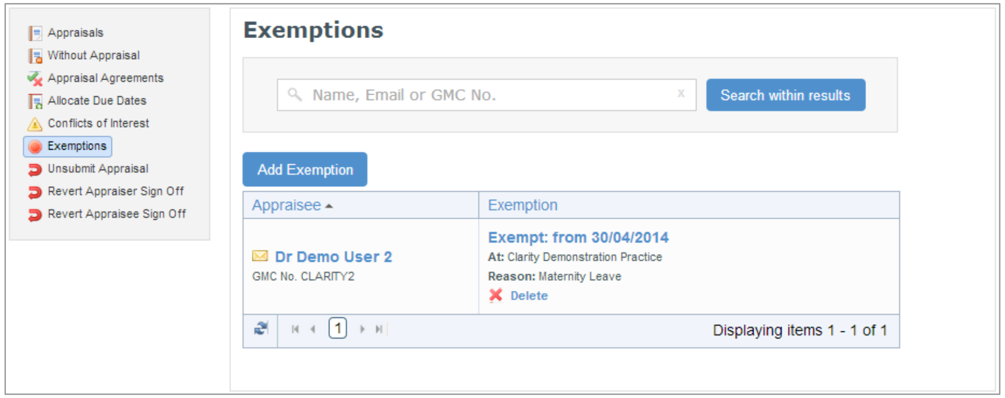
Managing Appraisals



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 and edit this information into the Exemptions section.



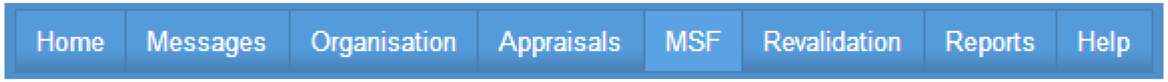
Allocating Appraisal Dates and Appraisers

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’ in the navigation bar 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.

Multi-Source Feedback



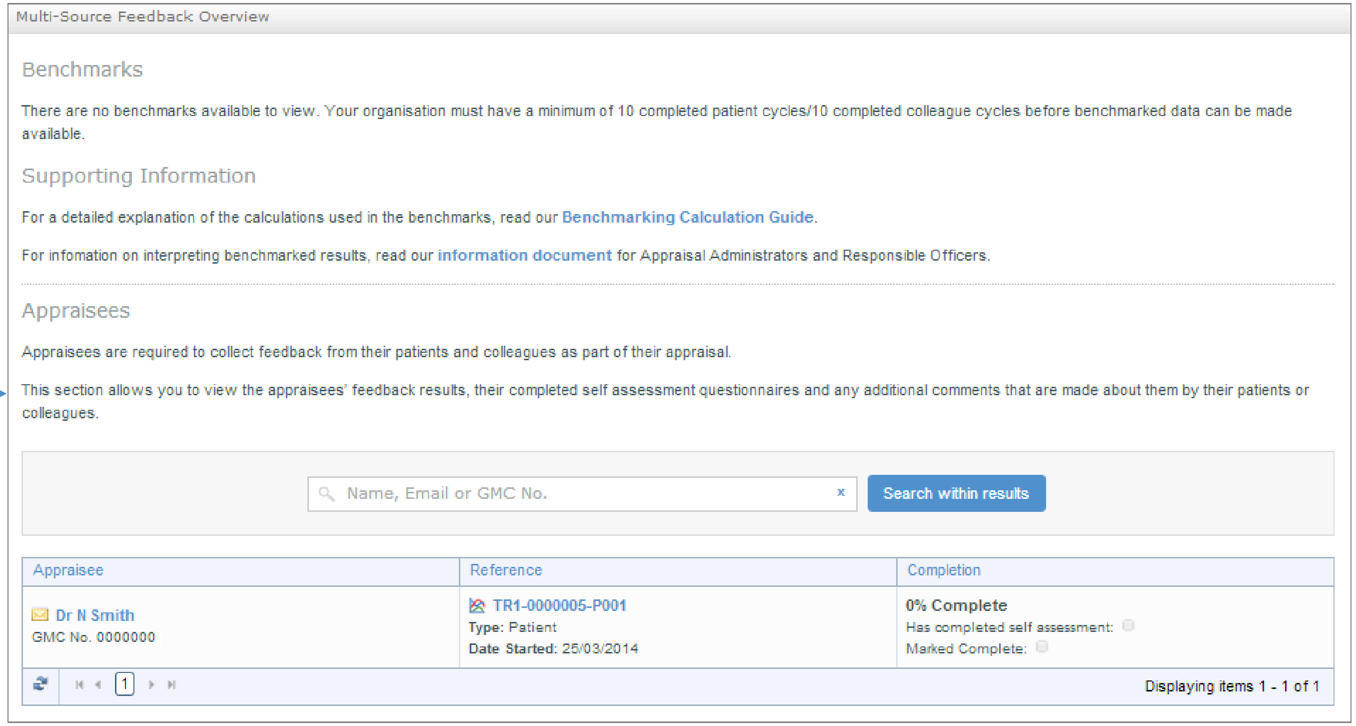
Click 'MSF' in the top menu bar to see your organisation's MSF progress, including benchmarks and individual results.

MSF Cycles

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

The Completion column will show when the appraisee has filled in their self-assessment and marked their cycle as complete.

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



FAQS

- **What is an MSF 'Cycle'?**

When an appraisee sends out a set of questionnaires to their colleagues or patients, they must first open a 'cycle'. This determines how many responses must be collected before they are able to see their results. Until the cycle reaches the minimum number of responses and is closed, all questionnaires that are distributed will be included in the cycle, and their results amalgamated into one set of results. You can set the minimum number of responses for cycles in your organisation in Organisation Settings.

- **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.