

Quick Start Guide: Appraisee

Accessing Appraisal Toolkit for GPs and Hospital Doctors

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

The screenshot shows the user interface for logging in or registering as an appraisee. It includes a 'Login' section with fields for 'Email Address' and 'Password', a 'Forgot your password?' link, and a 'Log In' button. Below this is a 'Select Role' section with a dropdown menu set to 'Appraisee' and 'Continue' and 'Cancel' buttons. To the right, there's a 'How can we help?' section with links for 'Are you a Doctor or Appraiser?' and 'Purchasing on behalf of your Doctors?'. Further right are two orange buttons: 'Register your account' and 'Request a quote'. At the bottom right, there's a 'More Info' section with a list of bullet points. A large blue '1' is positioned at the bottom left of the page.

Already registered?
Enter your registered email address and password then click 'Log in'

Forgot your password?
Click here to reset

If you are only registered as an Appraisee you will be logged straight in to your account. If you have another role you can select your Appraisee role, then click 'Continue'

Login

Email Address
Password

[Forgot your password?](#)

Log In

How can we help?

Are you a Doctor or Appraiser?
Start using our Appraisal Toolkit today.

Purchasing on behalf of your Doctors?
Contact our Sales team.

Register your account

Request a quote

New user? Click this button to register

Click here to request a group/practice quotation

Select Role

Role
Appraisee

Cancel Continue

More Info

- Allows access to all of your personal and learning data, your current and historic appraisals and revalidation cycles.
- Your data remains private until you include it in an appraisal and submit to your appraiser or enable early access.
- Completed appraisals are made available to your Appraisal Administrators and Responsible Officer.

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Your Homepage

Your Homepage shows your current appraisal details and status timeline and gives quick links to your most recent appraisal messages and your historic appraisals. You can start and access your current appraisal from the Homepage.

The Clarity & RCGP
Appraisal Toolkit
for GPs

Home Messages Professional Profile Portfolio Appraisals Revalidation MSF Help

Click the headings in the top menu bar to navigate through the Appraisal Toolkit

Click here to go to your Appraisal Toolkit messages inbox and view your system messages

Messages
(27 unread)

- ✉ An Appraisee has submitted their appraisal.
- ✉ You have been allocated an appraiser.
- ✉ A clinician has submitted their appraisal.

Click here to enter your revalidation date

Revalidation
Revalidation due by 15/03/2015

Click these links to access our extensive downloadable user guides and to contact our Customer Support Team through our helpdesk

Additional Resources

- ▶ Documentation and FAQs
- ▶ Helpdesk
- ▶ Useful websites

2019 - CLARITY DEMONSTRATION CCG
Appraiser: Dr Training User 3

Evidence from 01/04/2012 Evidence to 31/03/2013 Meeting Book Now Due before 31/03/2013

Current Appraisal Status

Open In Progress Submitted Appraising in Progress Awaiting Your Sign Off Complete

Go to your Appraisal

Keep track of your appraisal evidence and meeting dates

Click 'Start your Appraisal' or 'Go to your Appraisal' to access your Appraisal Dashboard

View all Appraisals

To view a full list of your current and historic appraisals click here

Your Professional Profile

The Professional Profile is for you to record your professional information. Information entered into the Professional Profile dated within the current appraisal period will automatically populate in your current appraisal (i.e. date relevant roles, qualifications).

The screenshot shows the 'The Clarity & RCGP Appraisal Toolkit for GPs' interface. The top navigation bar includes 'Home', 'Messages', 'Professional Profile' (highlighted with a red box), 'Portfolio', 'Appraisals', 'Revalidation', 'MSF', and 'Help'. The left navigation menu includes 'My Profile' (selected) and 'Guidance Notes' (highlighted with a red box). The main content area is titled 'My Personal and GMC Information' and contains sections for 'GMC Information', 'Personal Details', and 'Medical Indemnity'. A red arrow points from a callout box to the 'GMC Information' section.

Callout 1 (Left): Click the sections in the left navigation menu to move around your Profile

Callout 2 (Bottom Left): GMC information and Personal details on this page will already be populated from registration. GMC information cannot be amended as this is taken directly from the GMC, if this is incorrect, please contact the GMC directly

Callout 3 (Right): Guidance Notes are available in each section, these include tips about what information to include and why it is important for your appraisal and revalidation. This information is collated from GMC and AORMC guidance

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Page Footer: Agilio Primary Care

Your Portfolio

The Portfolio is the personal storage area of the Appraisal Toolkit. Evidence entered directly to the Portfolio will only be seen by yourself until you later choose to import into an appraisal.

Note: Items can be imported into an appraisal from the Appraisal Dashboard. Once an item is included in an appraisal it remains in the Portfolio showing the appraisal year in the Appraisal column.

The Clarity & RCGP
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for GPs

Home Messages Professional Profile Portfolio Appraisals Revalidation MSF Help

All Portfolio Items Guidance Notes

- CPD Events
- Quality Improvement Activities
- Significant Events
- Colleague and Patient Feedback
- Complaints and Compliments

All Portfolio Items

This page shows all of the evidence items you have added to Appraisal Toolkit. This includes items added to your Portfolio, directly into your appraisal and items imported between the two. You can search for specific items or filter the list using the Search options below.

Please note: Your Portfolio is a personal storage area – you can add items to your Portfolio throughout the year, but they will not be seen by your Appraiser as evidence until they are imported into your appraisal from your Appraisal Dashboard.

Search Portfolio Search within results

Appraisal	Section	Title	Date	Actions
	Feedback	System generated feedback report	17/06/2013	Open
	Feedback	System generated feedback report	17/06/2013	Open
	CPD	Equality, Diversity and Human Rights	01/03/2013	Open
2013	CPD	BMJ on-line module in Paediatric Palliative Care	19/02/2013	Open

Click the different sections in this left navigation bar to move around your Portfolio

Search your Portfolio for a specific item by entering key words into the search box then click on 'Search Within results'

Saved items can be edited or deleted by clicking on 'Open' in the Actions column

Your Appraisal Dashboard

Your Appraisal Dashboard contains the information you will be submitting to your appraiser. Information entered into section 3 of the appraisal should be new and relevant for the appraisal period you are working on.

The dashboard is titled "Your Appraisal for 2019" and features a progress bar at the top with stages: Evidence from 01/03/2018, Evidence to 31/03/2019, Meeting Book Now, and Due before 01/04/2019. Below this is a "Current Appraisal Status" timeline with stages: Open, In Progress, Submitted, Appraising in Progress, Awaiting Your Sign Off, and Complete. The main content area includes:

- Appraiser:** [Name], **Revalidation Date:** 15/04/2021, **Organisation:** CLARITY DEMONSTRATION CCG
- History:** 12/09/2013 - In Progress: Appraiser Removed: Dr Demo User10 (with Show history link)
- Last Year's PDP:** Last Years PDP (1)
- Appraisal Information:**

	Total
CPD Credit Hours Total	82.15
CPD (6)	14
Quality Improvement (6)	66.15
Significant Events (1)	2
Feedback (0)	
Complaints and Compliments (2)	
Additional Areas of Discussion	
Pre-appraisal Preparation	

The left navigation bar is divided into three main sections:

- 1. Personal Information:** GMC Information, Personal Information, Qualifications, Memberships.
- 2. Roles & Responsibilities:** Roles, Job Plans, Last Year's PDP, Minor Surgery Log.
- 3. Appraisal Information:** CPD Events, Quality Improvement Activities, Significant Events, Colleague and Patient Feedback, Complaints and Compliments, Additional Areas of Discussion, Pre-Appraisal, Proposed PDP, GMP Overview, Statements and Declarations, Additional Information.

Additional sections include:

- Actions:** Appraisal Meeting, Submit Appraisal.
- Tools:** Current Appraisal Documents, Completed Appraisals, Import from Portfolio, Grant Early Access, Revalidation Progress, Download Appraisal, Print Appraisal.

Your appraiser's contact details are available for you to view from your dashboard (if your appraiser is assigned)

This shows your appraisal timeline. Click 'Show History' to view your entire appraisal history, including any submissions or reversions

Keep track of your total CPD score for this appraisal

View all documents uploaded to the appraisal, Import from your Portfolio, allow your appraiser, administrator or RO early access to your appraisal evidence, view your Revalidation Progress and download/print versions of your appraisal

Click the different sections in this left navigation bar to move around your Appraisal Dashboard

Book/amend an appraisal meeting with your appraiser and submit your appraisal evidence

Entering evidence

Appraisal evidence can be added to the Appraisal, Portfolio and Professional Profile. Items entered directly into the appraisal will automatically populate in the Portfolio and the Professional Profile.

1. Personal Information

- GMC Information
- Personal Information
- Qualifications
- Memberships

2. Roles & Responsibilities

- Roles
- Job Plans
- Last Year's PDP
- Minor Surgery Log

3. Appraisal Information

- CPD Events**
- Quality Improvement Activities
- Significant Events
- Colleague and Patient Feedback
- Complaints and Compliments
- Additional Areas of Discussion
- Pre-Appraisal
- Proposed PDP
- GMP Overview
- Statements and Declarations

CPD Events

Use this section to record any CPD Activities you undertake. Evidence should cover your full scope of practice, including any managerial or academic positions you may hold.

[Add new item](#)

Title	Type	Date	CPD Score	Documents	
BMJ on-line module in Paediatric Palliative Care	Distance and Online Learning	19/02/2013	4		Open
Child Protection Update	Mandatory Training	04/02/2013	1	Certificate of Attendance	Open
Diabetes BMJ on-line learning modules	Distance and Online Learning	02/10/2012	3		Open
GP Trainer Group Meeting	Peer Learning Group	01/10/2012	2		Open
Emergency Planning Group - 6 weekly	Meetings - Organisation	19/08/2012	2		Open
Appraisal training	Structured Learning	29/04/2012	2		Open

Displaying items 1 - 6 of 6

[Import \(2\)](#)

If this symbol appears in the grid above, it indicates an Appraiser note has been added to this item.

Once the 'Details' have been saved, click on each of the other tabs along the top menu to add GMP domains, documents, reflection and link to your PDP

[Details](#) [GMP Domains](#) [Documents](#) [Reflection](#) [PDP](#)

Title

Select a CPD Type

Date

End Date

Description and Learning

CPD

CPD Score 0

CPD Credit Hours 0

Planning Hours 0

[Save](#)

Click on the section you wish to add evidence on the left navigation menu then click the 'Add new item' link at the top left of the table

Saved items can be edited or deleted by clicking on 'Edit/Delete' in the Actions column of the table. Documents can also be added or removed when editing

Complete the blank fields on the Details tab then click on the 'Save' button at the bottom of the page

Your Revalidation

Your Revalidation page allows you to keep track on where you are up to with your Revalidation.

Note: When you first start using Appraisal Toolkit you will need to create a revalidation cycle (see screenshot below).



Create Revalidation Cycle

What is Revalidation?

Revalidation is the process by which licensed doctors are required to demonstrate on a regular basis that they are up to date and fit to practise. Revalidation aims to give extra confidence to patients that their doctor is being regularly checked by their employer and the GMC.

You do not have a current revalidation cycle. Create one here and then allocate appraisals to it.
You will be able to monitor the progress of your revalidation cycle here too.

Year From	Year To	Revalidation Date	Designated Body
<input type="text" value="2016"/>	<input type="text" value="2021"/>	<input type="text" value="31/12/2021"/>	<input type="text" value="CLARITY DEMONSTRATION AREA TEA"/>
			<input type="button" value="Create Cycle"/>

Enter your 5 year revalidation cycle period and your revalidation date then click on the 'Create Cycle' button

The Cycle Status shows how many completed appraisals are assigned to the cycle, CPD points included towards revalidation and if colleague and patient feedback are included

Click 'Change Period' or 'Change date' to change your revalidation period or date

GMC Revalidation Status Not set

▼ ↻ Cycle Status and Options

Cycle Status

0 completed appraisals allocated to this cycle.

● **CPD Score: 0**
It is recommended that a minimum of 250 CPD Score are accumulated over a revalidation cycle.

- **Patient Feedback:** At least 1 completed feedback cycle is required.
- **Colleague Feedback:** At least 1 completed feedback cycle is required.

Cycle Options

Revalidation Cycle: 2016 - 2021
[↻ Change Period](#)

Revalidation Date: 31/12/2021
[📅 Change Date](#)

[📄 Allocate Appraisals](#)

Click 'Allocate Appraisals' to allocate current, historic or completed appraisals to the cycle

A table will be displayed showing evidence towards revalidation once an appraisal has been completed using Appraisal Toolkit and/or historic appraisals have been allocated with the additional information included

FAQs

How do I change my email address/username?

- To change your username/email address, please contact our Customer Support Team on **0845 113 7111**.

The system won't accept my username and/or password, what do I do?

There could be a number of reasons why you are be unable to Log in to Appraisal Toolkit. The most common issues are listed below:


- Your username is incorrect:
 - Using the wrong email address
 - Typos in the email address
 - Including spaces at the beginning or end of your email address
- Your password is incorrect:
 - Using the wrong password
 - Misspelling your password
 - Your password is case sensitive – you may not be including the correct uppercase, lowercase, letters, numbers and characters (your password **must** contain at least seven characters, including at least one number and one special character (? / ! £ \$ % & * \ # @ ~)
- You are locked out:
 - Entering the incorrect password 3 times locks out an account. When the account is locked, an email is generated to the registered email address containing a link to unlock the account.

If you have been locked out or are having difficulty with your user credentials, please contact the Customer Support Team on **0191 287 5800**. You will be asked to provide your full name, GMC number and answer to your security question before your password can be reset.

How do I add PDPs?

The first time you use Appraisal Toolkit you can enter the PDP activities you have been working towards over this appraisal period. If this is your first appraisal, tick **This is my first ever appraisal for this organisation.** in the Last Year's PDP section and you will not need to complete the following steps.

To add a new PDP:

- View your current appraisal
- Click 'Last Year's PDP' in section 2 of the left navigation bar
- Click **Add new item**
- Complete each of the tabs and click 

You can link your Portfolio evidence to the PDP in the 'Development Evidence' tab – just tick the **Use My Portfolio** box and select your items.

Can I make amendments to my appraisal after submitting it?

If you have submitted your appraisal but your appraiser has not yet started reviewing it, you can undo your submission by clicking 'Revert Submission' in your left navigation bar. If your appraisal has an 'Appraising in Progress' status, contact your appraiser or administrator and ask them to revert it for you.

For further guidance please see our online documentation at <http://wiki.clarity.co.uk> , contact our Customer Support Team on **0191 287 5800** or email us at doctors@agiliosoftware.com