

Quick Start Guide: Responsible Officer

Accessing Appraisal Toolkit for Doctors

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

Already registered and have the Responsible Officer role? Enter your email address and password then click 'Log In'

Login

Email Address

Password

[Forgot your password?](#)

Log In

Forgot your password? Click here to reset

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, once registered please contact us to have the Responsible Officer role added to your account

Select the Responsible Officer role after log in and click on 'Continue', if you do not have this option please contact our customer support team

Select Role

Role

Responsible Officer

Organisation

CLARITY DEMONSTRATION AREA TEAM

Cancel

Continue

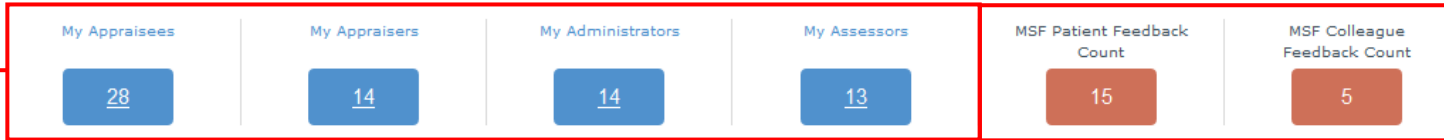
More Info

- You can access appraisal and revalidation data via dashboard widgets and calendars.
- You can access and control appraisals and revalidation cycles, record exemptions and conflicts.

Your Dashboard

Dashboard for CLARITY DEMONSTRATION AREA TEAM

View a list of your Appraisees, Appraisers, Administrators and Assessors by clicking on the widgets

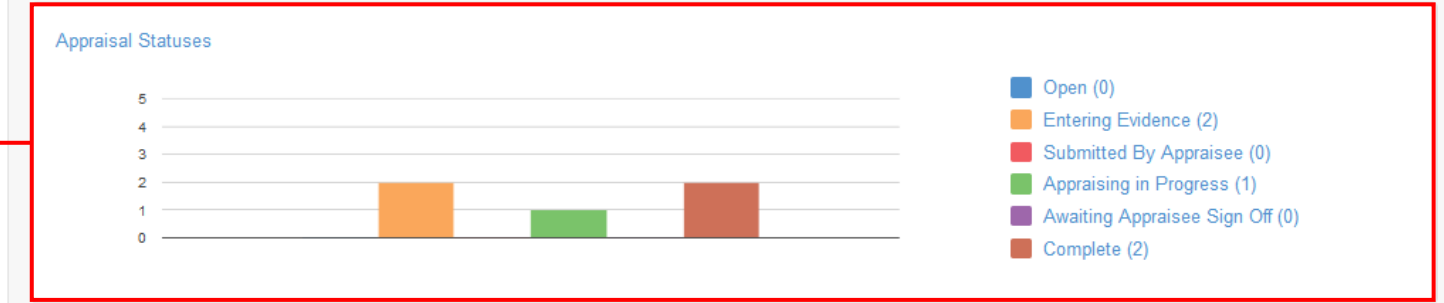


This widget shows the required number of colleague/patient questionnaires your organisation requires the doctors to complete for Revalidation

View your messages or appraisals calendar by clicking on the buttons

Messages (48 unread) | Calendar | 2015 | Settings

This graph shows the statuses of all appraisals within the selected appraisal year, you can click on the statuses on the right of the table to view all appraisals with the selected status



You can view Revalidations due before the end of the current appraisal year and Appraisees without a Revalidation date set with this widget

Revalidations Due

1

Without Revalidation Date

15

Appraisal Agreements

100%

- Appraiser Disagreed
- Appraiser Disagreed
- Both Disagreed
- Both Agreed

Latest 50 Appraisals Completed Since 17/10/2016

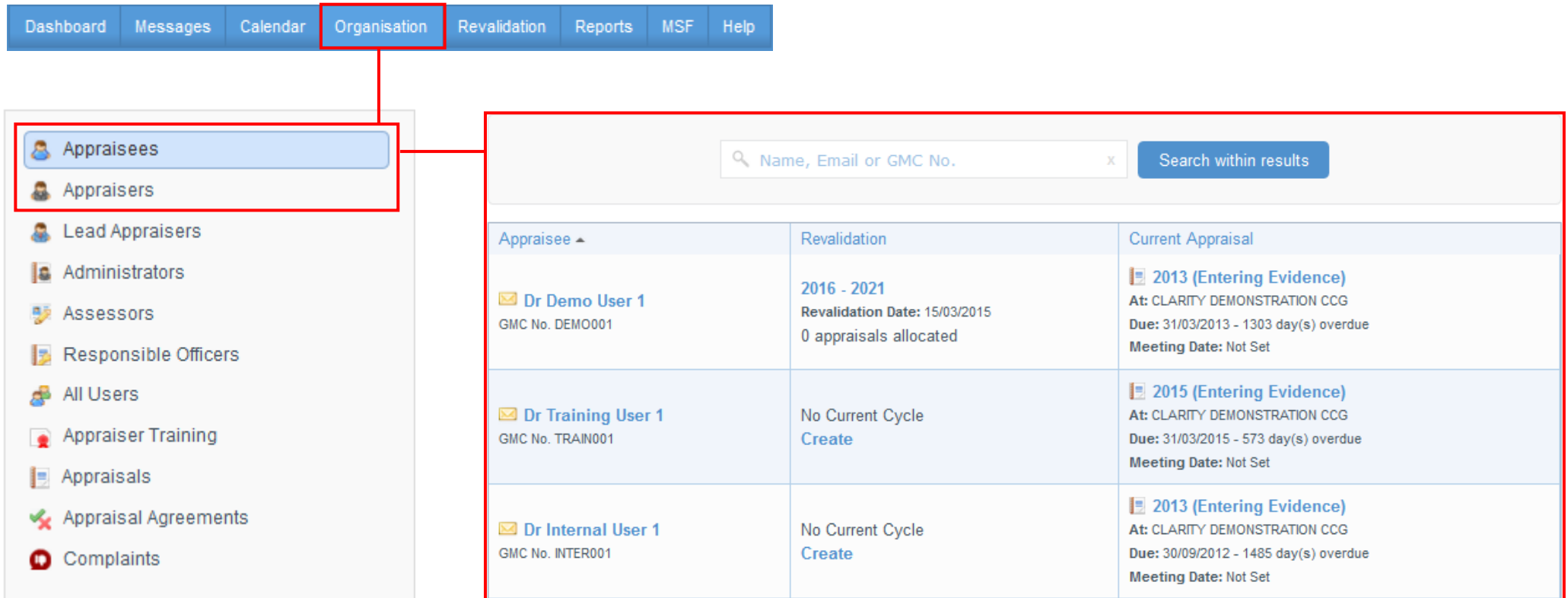
No Data - a graph will appear here once there is data available for this section.

You can view the percentage of appraisal agreements or disagreements between Appraisees and Appraisers within your organisation here







Viewing Appraisee/Appraiser information

To view personal information (including Personal Details, GMC Number, Contact details, Current Appraisals, Conflicts of Interest, Exemptions, Historic appraisals, Revalidation Cycles and Appraiser Training) for an individual registered within your organisation, click 'Organisation' in the top blue menu and select the role of the individual you wish to search for in the left menu (e.g. Appraisee, Appraiser), then use the search box to enter their name, GMC number or email address and click 'Search within results'.

You can access their profile by clicking on their name in the Appraisee/Appraiser column. The revalidation column will show you their revalidation information if they have created a cycle, if they have not you can click 'Create' to enter their revalidation information. You can view their current appraisal information in the 'Current Appraisal' column.



The screenshot shows the 'Organisation' menu selected in the top navigation bar. The left sidebar lists various roles, with 'Appraisees' highlighted. The main content area displays a search box and a table of appraisee information.

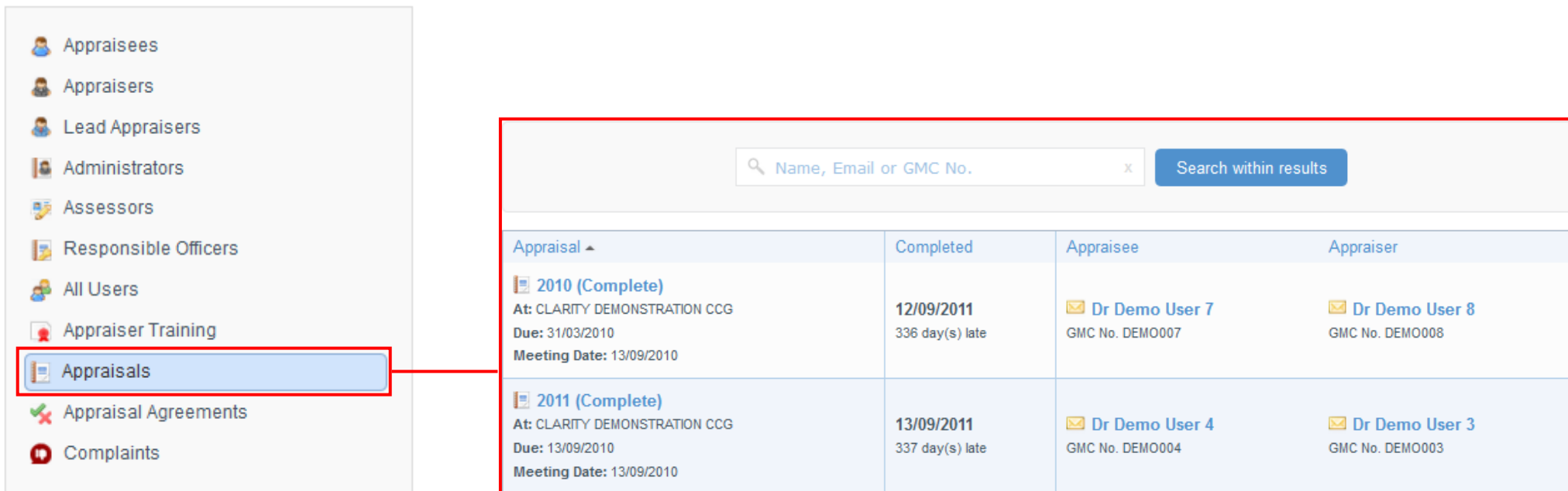
| Appraisee ▲ | Revalidation | Current Appraisal |
|---|---|--|
|  Dr Demo User 1 GMC No. DEMO001 | 2016 - 2021 Revalidation Date: 15/03/2015 0 appraisals allocated |  2013 (Entering Evidence) At: CLARITY DEMONSTRATION CCG Due: 31/03/2013 - 1303 day(s) overdue Meeting Date: Not Set |
|  Dr Training User 1 GMC No. TRAIN001 | No Current Cycle Create |  2015 (Entering Evidence) At: CLARITY DEMONSTRATION CCG Due: 31/03/2015 - 573 day(s) overdue Meeting Date: Not Set |
|  Dr Internal User 1 GMC No. INTER001 | No Current Cycle Create |  2013 (Entering Evidence) At: CLARITY DEMONSTRATION CCG Due: 30/09/2012 - 1485 day(s) overdue Meeting Date: Not Set |

Viewing Appraisals

To view a list of all of the historic and current appraisals from your organisation, click 'Organisation' on the top blue menu, click 'Appraisals' in the left navigation bar, then use the search box to enter the Appraisee or Appraiser's name, GMC number or email address and click 'Search within results'.

You can click the table headings to sort the appraisals. You can sort appraisals alphabetically according to Appraiser or Appraiser, due date (Appraisal column) and by date completed.

If an appraisal status is 'Complete', you can view it by clicking on the appraisal in the Appraisal column.



The screenshot shows the 'Appraisals' section of the Appraisal Toolkit. On the left, a navigation menu lists various roles, with 'Appraisals' highlighted in blue and enclosed in a red box. A red line connects this menu item to a table of appraisals on the right. The table has a search bar at the top with the text 'Name, Email or GMC No.' and a 'Search within results' button. The table columns are 'Appraisal', 'Completed', 'Appraisee', and 'Appraiser'. Two rows of appraisals are listed, both with a status of 'Complete'.

| Appraisal | Completed | Appraisee | Appraiser |
|---|---|---|---|
| <p>2010 (Complete) At: CLARITY DEMONSTRATION CCG Due: 31/03/2010 Meeting Date: 13/09/2010</p> | <p>12/09/2011 336 day(s) late</p> | <p>Dr Demo User 7 GMC No. DEMO007</p> | <p>Dr Demo User 8 GMC No. DEMO008</p> |
| <p>2011 (Complete) At: CLARITY DEMONSTRATION CCG Due: 13/09/2010 Meeting Date: 13/09/2010</p> | <p>13/09/2011 337 day(s) late</p> | <p>Dr Demo User 4 GMC No. DEMO004</p> | <p>Dr Demo User 3 GMC No. DEMO003</p> |

Creating Revalidation Cycles

Click 'Revalidation' in the top blue menu, then use the search box to enter their name, GMC number or email address and click 'Search within results'. If the doctor already has a Revalidation Cycle it will appear and can be viewed in the Current Cycle table.

If the doctor does not have a Current Cycle you can click 'Create' and enter the details of their Revalidation Cycle.

The screenshot shows the 'Revalidation' menu item highlighted in the top navigation bar. Below it is a search box with the placeholder text 'Name, Email or GMC No.' and a 'Search within results' button. A table below the search box lists appraisees. The first row shows 'Dr Demo User 17' with GMC No. DEMO0017. The 'Current Cycle' column for this user shows 'No Current Cycle' and a 'Create' link. The 'Revalidation Date' column shows 'Not set'. A dialog box titled 'Create Revalidation Cycle' is open, showing the following details:

| Appraisee | Current Cycle | Revalidation Date |
|-------------------------------------|--|-------------------|
| Dr Demo User 17 GMC No. DEMO0017 | No Current Cycle Create | Not set |

Create Revalidation Cycle

You are about to create a new revalidation cycle for **Dr Demo User 17**.

Year From
2016

Year To
2021

Revalidation Date
31/07/2021

[Create Cycle](#) [Cancel](#)

Viewing Revalidation Cycles

Revalidation Cycle Progress for Dr Demo User 17 at CLARITY DEMONSTRATION AREA TEAM

[Back to List](#)

GMC Revalidation Status Not set

[Set GMC Status](#)

Click 'Set GMC Status' to select the GMC revalidation status of the doctor

Revalidation Recommendation Not set

[Make Recommendation](#)

Click 'Make Recommendation' to select your revalidation recommendation for the doctor

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

[Close Cycle](#)

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

Revalidation Date: 31/07/2021
[Change Date](#)

[Allocate Appraisals](#)

Once the relevant GMC revalidation status, revalidation recommendation, appraisals and notes have been added the cycle can be closed. Click 'Close Cycle' to close the cycle

Click 'Allocate Appraisals' to link appraisals to the revalidation cycle. Revalidation relevant information from allocated appraisals will appear in the Cycle Status box

Admin Notes

Responsible Officer Notes [Add Notes](#)

Notes can be added by clicking 'Add Notes'. Any notes added can be seen by your registered appraisal administrators

FAQs

I am unable to log in to Appraisal Toolkit, 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:

- Incorrect email address/password are being entered
- Typos in the email address/password being entered
- Including spaces at the beginning or end of the email address/password
- Misspelling of the password
- The password is case sensitive – you may not be including the correct uppercase, lowercase, letters, numbers and characters (your password **must** contain seven characters, including at least one number and one special character (? / ! £ \$ % & * \ # @ ~)
- Your account may be locked out - entering the incorrect password 3 times locks an account.

If you have been locked out or are having difficulty with your user credentials, please contact our Customer Support Team on **0845 113 7111**. You will be asked to provide your full name, GMC number and to answer your security question before your password can be reset.

How do I change my email address?

Please contact our Customer Support Team on **0845 113 7111** who will be able to assist in changing your email address over the telephone.

Why is evidence missing on the Revalidation Cycle status screen?

Only appraisals marked as 'Complete' are included in the Revalidation Cycle. Any evidence included within appraisals that are in the status of 'In Progress', 'Submitted', 'Appraising in Progress' or 'Awaiting Sign Off' will not be displayed in the cycle until the appraisal is at the 'Complete' stage.

Therefore if a doctor has included (for example) MSF cycles within an appraisal but the appraisal has not yet been signed off, the Revalidation Cycle status screen will show that they have no MSF cycles for this Revalidation Cycle. This will be updated once the appraisal is completed.

For further guidance please see our online documentation at <http://wiki.clarity.co.uk/display/1/Responsible+Officer> or contact our Customer Support Team on **0845 113 7111** or email us at doctors-appraisals-enquiries@clarity.co.uk.