agilio | CLARiTY DOCTORS

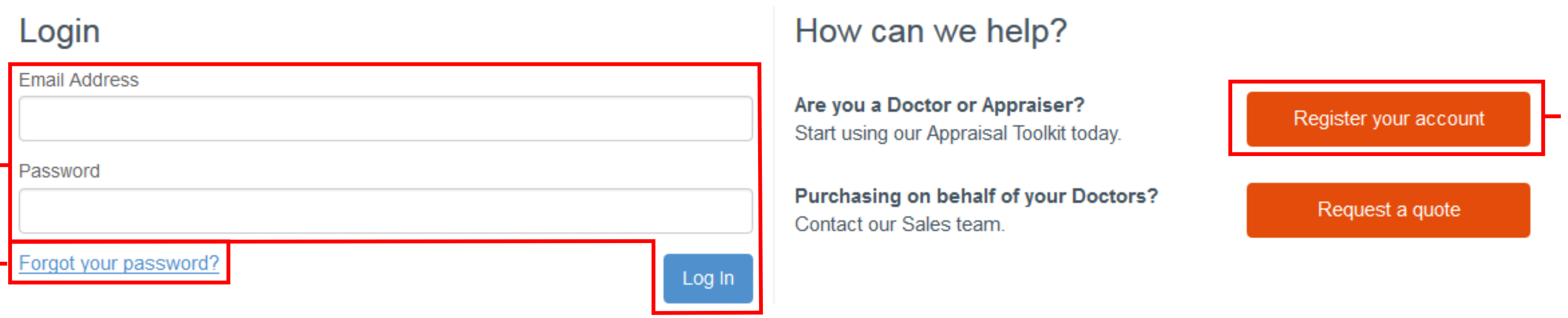
Quick Start Guide: Administrator

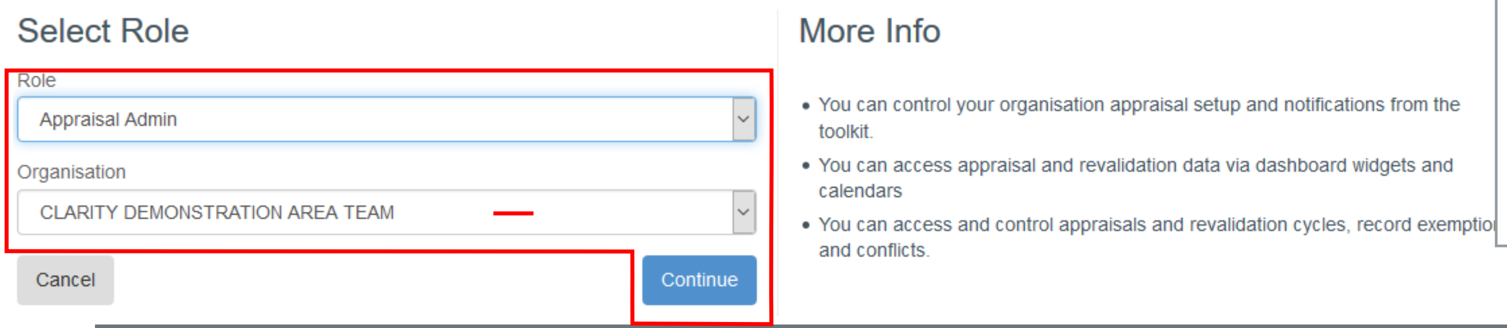
Accessing Appraisal Toolkit for Doctors

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 Administrator role? Enter your email address and password then click 'Log In'

Forgot your password? Click here to reset





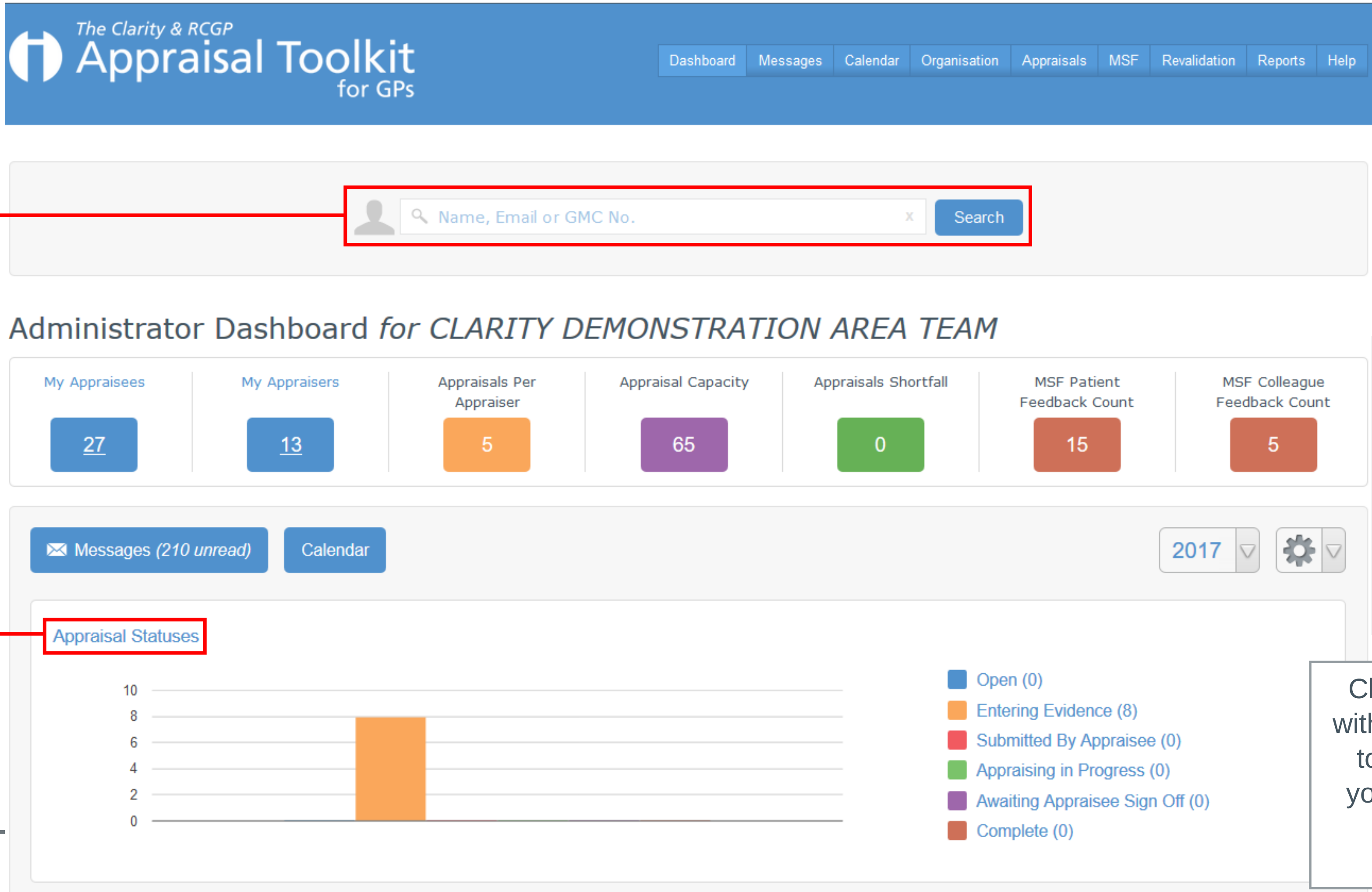
If you have more than one role on the Appraisal Toolkit select the 'Appraisal Admin' role after log in and click on 'Continue', if you do not have this option please contact our customer support team

Your Dashboard

The widgets on your Dashboard show vital statistics for your organisation. Use them to monitor your appraisees and appraisers.

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

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



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

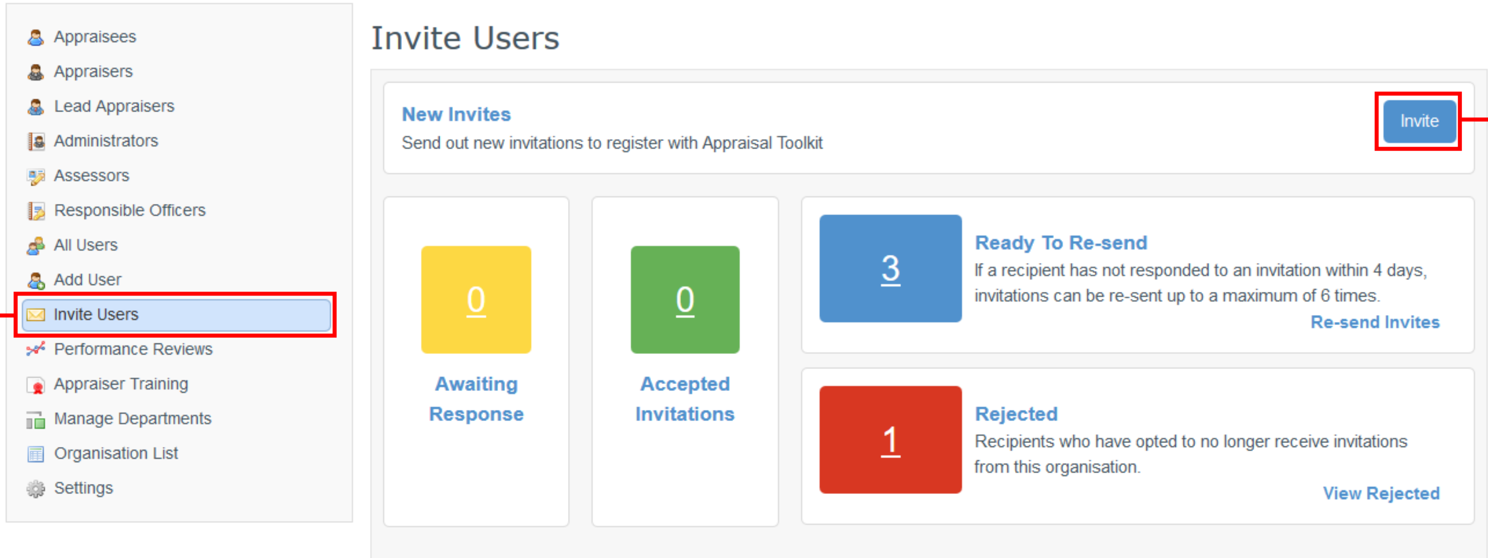
Managing Your Organisation

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.



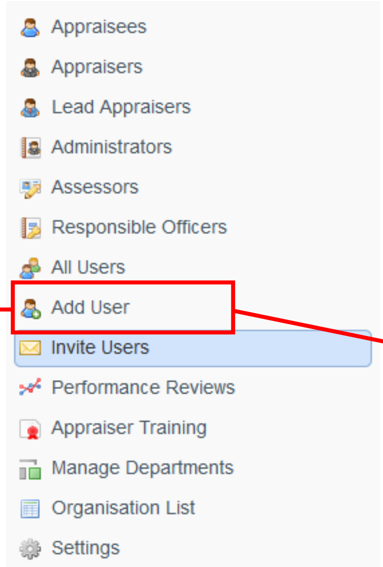
Click the ‘Invite’ button, enter the email addresses of the staff you want to invite, then click ‘Send’.

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.

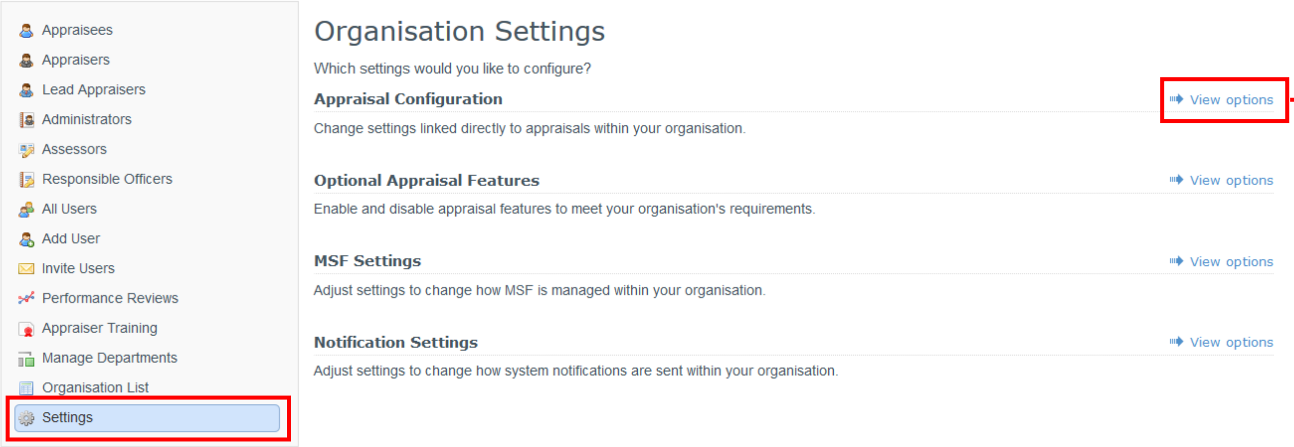
You can view a list of recipients that have rejected their invitations by clicking ‘View Rejected’.

Adding roles to already registered users

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



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 assigns appraisal due dates, how many times an appraiser can appraise an individual, and more.

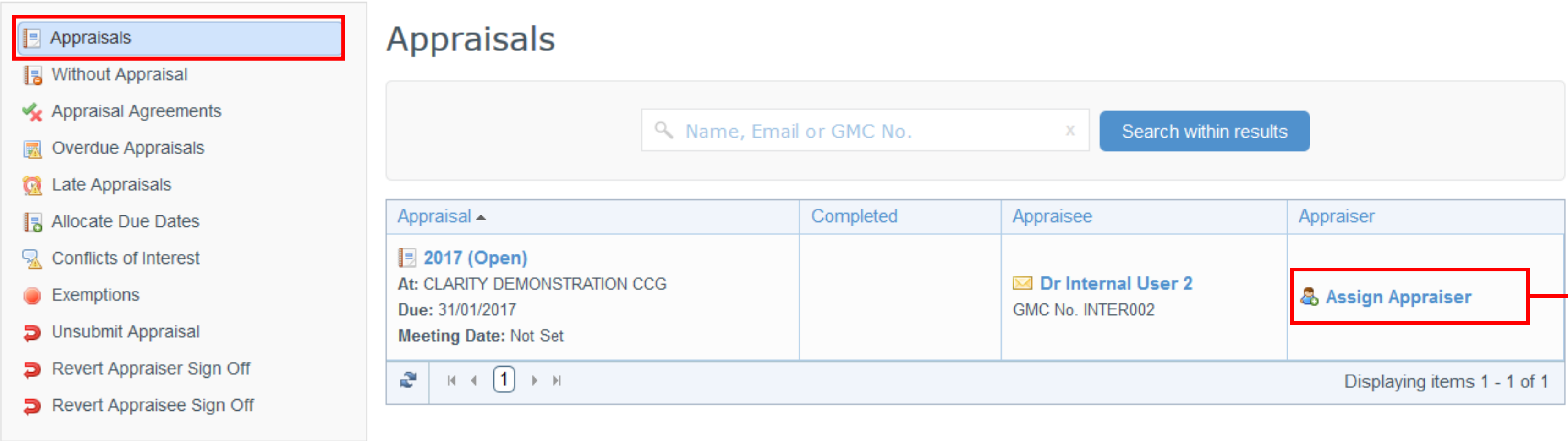
Managing Appraisals

Click ‘Appraisals’ in the top menu bar to begin managing your organisation’s appraisals.

Create Appraisal

To create an appraisal for an appraisee who is without a current appraisal, click ‘Without Appraisal’ in the left navigation bar. You can search for the appraisee using the search box, then click ‘Create’ in the actions column.

Assign an appraiser



To assign an appraiser to an appraisee who is without a current appraiser, click 'Appraisals' in the left navigation bar. You can search for the appraisee using the search box, then click 'Assign Appraiser' in the actions column and click 'Match' in the actions column of the appraiser list.

Change an appraisal date or appraiser

To assign an appraiser to an appraisee who is without a current appraiser, click 'Appraisals' in the left navigation bar. You can search for the appraisee using the search box, then click 'Assign Appraiser' in the actions column and click 'Match' in the actions column of the appraiser list.

Multi-Source Feedback

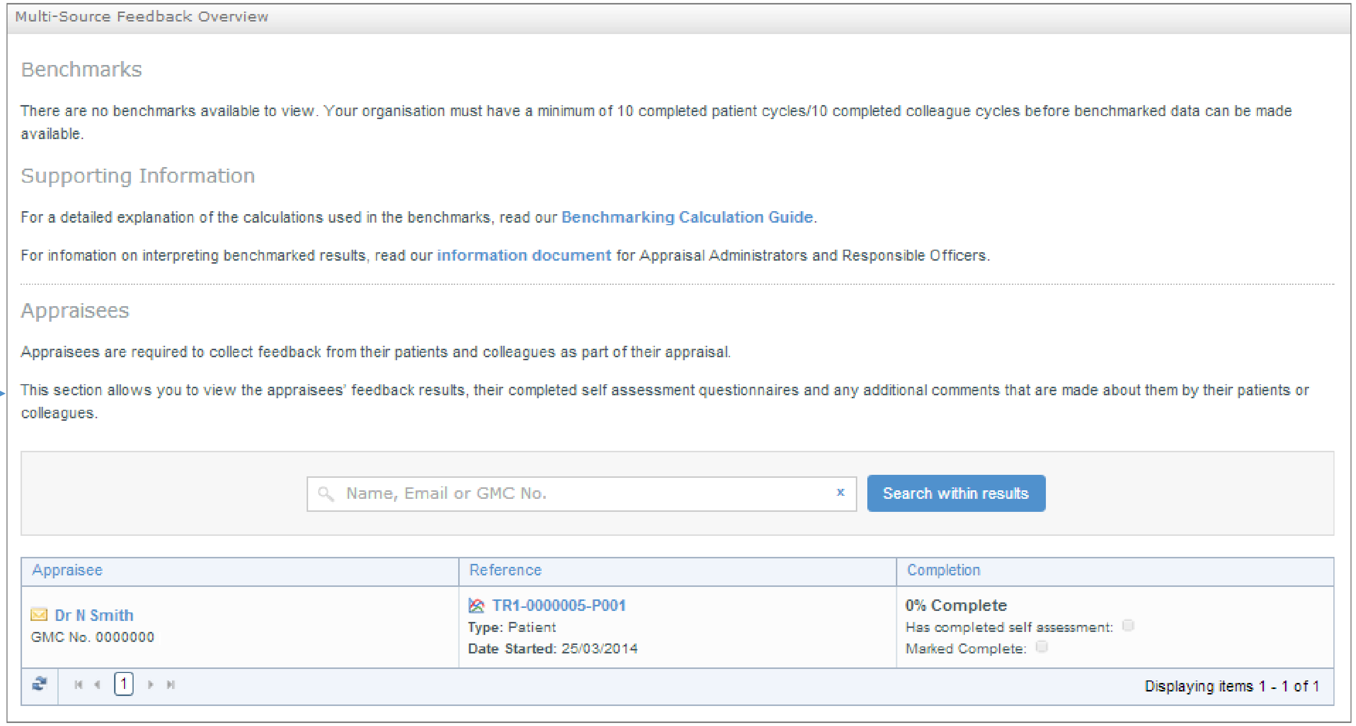
Click 'MSF' in the top menu bar to see your organisation's MSF progress, including benchmarks and individual results.

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 **0191 287 5800** or email us at doctors@agiliosoftware.com