

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'

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.

Register your account

Purchasing on behalf of your Doctors?

Contact our Sales team.

Request a quote

Select Role

Role

Appraisal Admin

Organisation

CLARITY DEMONSTRATION AREA TEAM

Cancel

Continue

More Info

- You can control your organisation appraisal setup and notifications from the toolkit.
- 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.

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.

The Clarity & RCGP
Appraisal Toolkit
for GPs

Dashboard Messages Calendar Organisation Appraisals MSF Revalidation Reports Help

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

Administrator Dashboard for CLARITY DEMONSTRATION AREA TEAM

My Appraisees 27	My Appraisers 13	Appraisals Per Appraiser 5	Appraisal Capacity 65	Appraisals Shortfall 0	MSF Patient Feedback Count 15	MSF Colleague Feedback Count 5
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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 the blue links in each widget to view more detailed information about each section

Messages (210 unread) Calendar 2017 [Settings]

[Appraisal Statuses](#)

Status	Count
Open	0
Entering Evidence	8
Submitted By Appraiser	0
Appraising in Progress	0
Awaiting Appraiser Sign Off	0
Complete	0

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

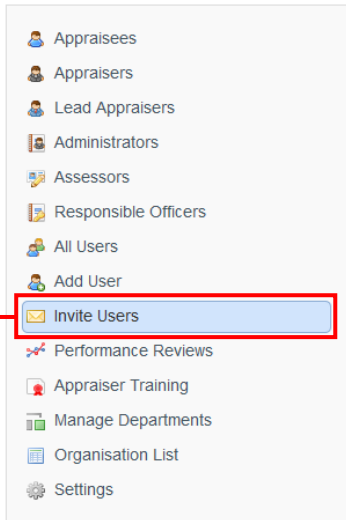


Click 'Organisation' in the top menu bar to begin managing your organisation, staff and settings.

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.



Invite Users

The 'Invite Users' dashboard features a 'New Invites' section at the top with a sub-header 'Send out new invitations to register with Appraisal Toolkit' and an 'Invite' button. Below this are three main status cards: 'Awaiting Response' (0), 'Accepted Invitations' (0), and 'Ready To Re-send' (3). The 'Ready To Re-send' card includes a note: 'If a recipient has not responded to an invitation within 4 days, invitations can be re-sent up to a maximum of 6 times.' Below these are two more cards: 'Rejected' (1) with a note: 'Recipients who have opted to no longer receive invitations from this organisation.' The 'Invite' button in the top right is highlighted with a red rectangular box.

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 Appraiser' or 'Add Appraiser' in the pop up box then search for their name. Click the 'Add' link to assign the role to the user.

The screenshot displays the 'Add New User' interface. On the left, a navigation menu lists various roles: Appraisees, Appraisers, Lead Appraisers, Administrators, Assessors, Responsible Officers, All Users, Add User, Invite Users, Performance Reviews, Appraiser Training, Manage Departments, Organisation List, and Settings. The 'Add User' option is highlighted with a red box. A red arrow points from this box to the 'Add Appraiser' option in the 'Add New User' pop-up. The pop-up has a blue header with the title 'Add New User' and a close button (X). Below the header, it says 'Select type of user to add:' and lists three options: 'Add Appraisee', 'Add Assessor', and 'Add Appraiser'. Each option includes a brief description of the role's capabilities. The 'Add Appraiser' option is also highlighted with a red box. At the bottom right of the pop-up is a 'Close' button.

Organisation settings

- Appraisees
- Appraisers
- Lead Appraisers
- Administrators
- Assessors
- Responsible Officers
- All Users
- Add User
- Invite Users
- Performance Reviews
- Appraiser Training
- Manage Departments
- Organisation List
- Settings**

Organisation Settings

Which settings would you like to configure?

Appraisal Configuration

Change settings linked directly to appraisals within your organisation.

[View options](#)

Optional Appraisal Features

Enable and disable appraisal features to meet your organisation's requirements.

[View options](#)

MSF Settings

Adjust settings to change how MSF is managed within your organisation.

[View options](#)

Notification Settings

Adjust settings to change how system notifications are sent within your organisation.

[View options](#)

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

- Dashboard
- Messages
- Calendar
- Organisation
- Appraisals
- MSF
- Revalidation
- Reports
- Help

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

Create Appraisal

- Appraisals
- Without Appraisal
- Appraisal Agreements
- Overdue Appraisals
- Late Appraisals
- Allocate Due Dates
- Conflicts of Interest
- Exemptions
- Unsubmit Appraisal
- Revert Appraiser Sign Off
- Revert Appraisee Sign Off

Without Appraisal

Appraisee	Year	Actions
Dr Training User 1 GMC No. TRAIN001	2017	Create
Dr Demo User 1 GMC No. DEMO001	2017	Create
Dr Internal User 1 GMC No. INTER001	2017	Create
Dr Training User 10 GMC No. TRAIN0010	2017	Create
Dr Demo User 10 GMC No. DEMO0010	2017	Create
Dr Demo User 11 GMC No. DEMO0011	2017	Create

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.

Results Filter

For Appraisal Year

Assign an appraiser

- 📄 Appraisals
- 📄 Without Appraisal
- ✅ Appraisal Agreements
- 📄 Overdue Appraisals
- 📄 Late Appraisals
- 📄 Allocate Due Dates
- ⚠️ Conflicts of Interest
- 🔴 Exemptions
- ➡️ Unsubmit Appraisal
- ➡️ Revert Appraiser Sign Off
- ➡️ Revert Appraisee Sign Off

Appraisals

Search within results

Appraisal ▲	Completed	Appraisee	Appraiser
<p>📄 2017 (Open) At: CLARITY DEMONSTRATION CCG Due: 31/01/2017 Meeting Date: Not Set</p>		<p>✉️ Dr Internal User 2 GMC No. INTER002</p>	👤 Assign Appraiser

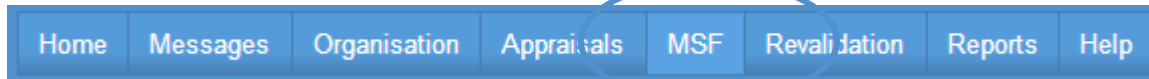
🔄
« 1 »
Displaying items 1 - 1 of 1

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.

Multi-Source Feedback Overview

Benchmarks

There are no benchmarks available to view. Your organisation must have a minimum of 10 completed patient cycles/10 completed colleague cycles before benchmarked data can be made available.

Supporting Information

For a detailed explanation of the calculations used in the benchmarks, read our [Benchmarking Calculation Guide](#).

For information on interpreting benchmarked results, read our [information document](#) for Appraisal Administrators and Responsible Officers.

Appraisees

Appraisees are required to collect feedback from their patients and colleagues as part of their appraisal.

This section allows you to view the appraisees' feedback results, their completed self assessment questionnaires and any additional comments that are made about them by their patients or colleagues.

Search:

Appraisee	Reference	Completion
Dr N Smith GMC No. 0000000	TR1-0000005-P001 Type: Patient Date Started: 25/03/2014	0% Complete Has completed self assessment: <input type="checkbox"/> Marked Complete: <input type="checkbox"/>

« 1 » Displaying items 1 - 1 of 1

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