<u>Step 1</u>

You will receive 2 emails from <u>Lucy@equiniti360clinical.com</u>. 1 will have a user name and password in it the other will have the activation code.

Click the web link in the email and enter your username and password and click sign in

Dear

Welcome to your Revalidation Management System (RMS). Revalidation will begin in late 2012 and will contribute to the ongoing improvement in the quality of medical care. **As part of Revalidation you are required to:**

- Maintain up to date personal details
- Keep a portfolio of key supporting information
- Engage in an annual appraisal.

This system will help you make sure you have all the correct information. The only people who will have access to the portfolio will be your appraiser, your responsible officer and our administrators if you ask for our help with your permission. Your appraiser and RO will only be able to see the documentation that you have published.

The system aims to save you time and keep the process simple. The first step is to set your account up and make sure that your personal details are up to date. This should take about fifteen minutes. You only need to do this once and adjust any changes each year. To activate your account please follow these steps

- 1. Click on the link below and enter the username and password in this email and follow the instructions to log in. It is advisable to copy and paste the user name and password.
- 2. For the very first time you use the system only, there is an activation code that will be sent to you on a separate email for security reasons.
- 3. The system will ask you to change your password to something you will remember. We strongly advise that at this point you keep the user name on this email and your chosen password somewhere safe and confidential so that when you go to use RMS next time (which may not be for a few months) you can find it.

Once you have logged in the system will take you automatically to your personal profile page. The RMS system will have completed as much of the form for you as possible. Please correct any details that are wrong and fill in any gaps.

Following this you can save Supporting Information into your portfolio whenever you like. The system guides you in what you need to collect and will remind you what to do near to your appraisal.

We hope that you find the system helpful and straightforward.

Login at the following location: https://www.equiniti360.com

Your username to enter the site is: UserXXXXX

Your password to enter the site is: XXXXXXXXX



Copy and paste the user name and password below

| | Sign In | | | | | |
|----|--|---|---------------|---|---------|---|
| - | User name:* | | 0 | Forgotten your username? | | |
| ٦/ | Password:* | | 0 | Forgotten your password? | | |
| | If this is your first password on you activation code. | time logging in, you will fir ır welcome email. Please | nd yo do n | our user name and start up ot confuse this with your | | |
| | | | | | Sign In | l |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Agree terms of use and privacy by ticking the box and clicking next



Enter your activation code and give the system a security question and answer. Your choice, just something memorable.

| Setup Security Questic | on and Answer Page 2 | of 3 |
|------------------------|--|---------|
| Activation code:* | Your activation code can be found on a separate email | |
| Security question:* | You need to create a question that only you know the answer to the system can ask you in the event that your forget your passwor | at d |
| Secret answer:* | 0 | |
| | Cancel | - |

Change password to something of your choice. Please read the notes about constructing the password.

| | Page 3 of 3 |
|--|--|
| Change Password | |
| User name: New password:* | Craig1953 |
| Re-enter password:* | 0 |
| You are required to create a p 15 characters. For security re case letter, number and non- Please now keep your userr when you log in next time, w | bassword with a minimum of 8 characters, and no more than asons this must contain at least one upper case letter, lower alphanumeric character (e.g. !) name and password somewhere safe so that you can find it hich may not be for a couple of months. |
| | Cancel Next |

<u>Step 2</u>

Click profile and edit profile. Complete the screens filling in any missing information from left to right by clicking NEXT to move from one to another.

| Details Details | Details Contacts of w | Posts Details |
|--|---|-----------------------------|
| Please fill in the relevant informa Please alter any incorrect detail | ation. There are seven short sections. Some boxes may have alre s and complete any gaps. | ady been completed for you. |
| Your Personal Details | | |
| fitle * | Dr | |
| First Name | Tim | |
| ast Name * | Cresswell2 | |
| DOB * | 16/10/1971 eg. 15/07/1961 🥑 | |
| Email * | tim.cresswell@equiniti360clinical.com | |
| Phone * | 07501226429 | 0 |
| Vlain Speciality * | Testing | |
| Other Specialities | | |
| | | |
| | | |
| GMC Number * | 5557788 | |
| Add Profile Photo | Add Bhoto | |
| | | |
| | | |
| | | |
| | | |

<u>Step 3</u>

Uploading documents. Click portfolio and Upload supporting information button

| Upload Supporting Information | Export Portfolio | Bulk Change SI Status | | |
|---|------------------|------------------------|------|----------------|
| | | Buik Ghange Si Status | | |
| | | | | |
| Portfolio Overview | <u> </u> | Supporting Information | on | |
| View full portfolio | 0 | Title | Type | Status Expires |
| Supporting information to be filed | 0 | | 1300 | olduo Expiroo |
| Additional supporting information | 0 | | | |
| Core Supporting Information | ^ | | | |
| Personal | | | | |
| Self Declaration Health | 0 | | | |
| Self Declaration Probity | 0 | | | |
| Personal Development Plan (PDP) | 0 | | | |
| GMC | | | | |
| Oontinuing professional development (CPD) | 0 | | | |
| Quality improvement activity (e.g. Audit) | 0 | | | |
| Ø Significant events | 0 | | | |
| Peedback from colleagues | 0 | | | |
| Peedback from patient (where applicable) | 0 | | | |
| Review of complaints and compliments | 0 | | | |
| Organisation | | | | |
| Job Planning | 0 | | | |
| Management | 0 | | | |
| Research | 0 | | | |
| Teaching | 0 | | | |
| Mandatory training | 0 | | | |
| | | | | |

Select type of supporting information from drop down list. Click 'attach document'. This will take you into your hard drive just like attaching a file to an email. Find file and select

| Home Profile - Portfolio - My Progress Appraisal | Revalidation My Account My Doctors Help | |
|--|--|--|
| Upload Supporting Information | | Upload Multiple Documents |
| Add title for Supporting Information Attach Document | Quality improvement activity (e.g. Audit) • United • Additional supporting information • Self Declaration Probity • Personal Development (Plan (current & new draft) • Continuing ordersional development (CPD) Remove | Click the GMP Mapping botton to review the default filling against the GMP framework Do not add any patient identifiable information in documents or reflective notes |
| Documents wi Add reflective notes | Quality improvement activity (e.g. Audit) L*:<>? \/ [] ~. Significant events L*:<>? \/ [] ~. Feedback from colleagues L*:<>? \/ [] ~. Review of compliants and compliments V | This save icon is for saving reflective notes only – If you want to save the attachment then please click on the buttons at the bottom of the screen |
| | TYPE REFLECTIVE NOTES HERE | For guidance on what to include in your reflective notes, click here |
| Status of document | Published 🔹 🕑 | |
| Document valid from* | 07/05/2014 | |
| Referition period * Value of document (optional) | O to be used for the next appraisal only O to remain in my portfolio until 250 250 CPD points | 0 |
| Ned Item | | Canoel Save & Close Save & Add New Review GMP Mapping |

In the big text box type your reflective notes.

To complete your portfolio click on Health declaration and Probity declaration one at a time and complete the declarations

| Id St. Search Supporting Information | | | | | | | | |
|---|----------|---------|----------------------------|-------------------------------|------------|---------|------------|--------|
| | ortfolio | Bulk Ch | ange SI Status | | | | | |
| ortfolio Ov Search Portfolio Documents (Standard) Search Portfolio Documents (Advanced) | ~ | | Supporting Information | | | | | |
| View full portfolio | 16 | | Title | Туре | Status | Expires | Reflective | |
| Supporting information to be filed | 7 | | | | | | Notes | |
| Additional supporting information | 0 | | Health Declaration | Self Declaration Health | Published | | Edit/File | Delete |
| Core Supporting Information | ~ | | th | Significant events | Published | | Edit/File | Delete |
| Personal | | | Prohity Declaration | Self Declaration Probity | Published | | Edit/File | Delete |
| Self Declaration Health | 1 | | | Sen Becardoorr roomy | - uonarrea | | Luterne | |
| Self Declaration Probity | 1 | | Concerns over patient care | Significant events | Published | | Edit/File | Deleti |
| Personal Development Plan (current & new draft) | 1 | | 360 Patient feedback | Feedback from patients (where | Published | | Edit/File | Delete |
| GMC | | | | applicable) | | | | |
| Continuing professional development (CPD) | 1 | | CPD 2012 | Continuing professional | Published | | Edit/File | Delet |
| Quality improvement activity (e.g. Audit) | 1 | | | development (CPD) | | | | |
| Significant events | 2 | | DP 2013 | Current & new draft) | Published | | Edit/File | Delet |
| Feedback from colleagues | 1 | | Management for all | Lipfied | Dublished | | E-mailine. | Dates |
| Feedback from patients (where applicable) | 1 | | 2 Management for an | Grinde | Published | | COLUMN | Delet |
| Review of complaints and compliments | 0 | | Coleague feedback | Feedback from colleagues | Published | | Edit/File | Delet |
| Organisation | | | L Audit results | Quality improvement activity | Published | | Edit/File | Delete |
| Job Planning | 0 | | | (e.g. Audit) | | | | |
| Management | 0 | | Teaching Guidance | Unfiled | Published | | Edit/File | Delete |
| Research | 0 | | Planning list | Unfiled | Published | | Edit/File | Delete |
| Teaching | 0 | | St Johns Ambulance | Lipfied | Published | | Edit/Eile | Delete |
| Mandatory training | 0 | | | Crimed | - usualied | | e.diorne | Veleti |
| Clinical Governance | 0 | | Research Guidance | Unfiled | Published | | Edit/File | Delet |
| External work | 0 | ~ - | Training | Unfiled | Published | | E-tit/File | Delet |

To start the appraisal process click appraisal in the top bar. If the headings are all green ticks then you have at least 1 document uploaded to each heading. If not go back to portfolio to fill in any missing blanks. When happy click Start self-assessment

| <form>A characterized in the second sec</form> | ppraisal Preparation | | |
|--|---|---|---|
| Provide proceeding and pr | Preparation Set Assessment | t Portfolio Appreisal PDP Appreisal Summary | Agreement Statement |
| | How your appressed processe works | | |
| The the the guide has a your own the Marker Algorithm Algorithm Algorithm Algorithm Textman (15). Carrent expectival information and examples that have a set that a later than your have have a set that a later that later that later that a later that a later that a | This appraisal system is designed to keep the pro between appraiser and appraises. A few weeks take to complete your appraisal discussion. | caas as helpful and straightforward as possible. The mest important part of your appraisal is the discussion before your specified appraisal data you will receive an email from the system which will guide you through | neflection and planning the steps you need to |
| clare traces per traces and an extra trace and a large trace and and and a sequence and a sequen | For further guidance you can view the Medical Ap | prokal Guide (MAG) published by the NITS Revalidation Support Team (RST) | |
| Append shows The states of the states of the states and the states of the states and the states | Current appraisal information and status is outline | ad below. A default appraisal date may have been set. Please ensure the appraisal date is correct. | |
| Approxed tables Carster searce species that and your mater table you buffers your approbal. Dr. Dessing Floereuro I and approxed tables Dr. Dessing Floereuro Dr. Dessing Floereuro Dr. Dessing Floereuro Dr. Dessing Floereuro Dr. Dessing Floereuro Dr. Dessing Floereuro Dr | | | |
| Dar I have a suggest of a sugge | Appresal detella | | |
| Pr. Passion Fleenvood N:: Preservoor Prese | Enter the exact or approximate date of your next The date is used by the system to send a reminde | appraisal-you can change the date later on once the appraisal meeting has been confirmed. In help you before your appraisal. | |
| And A decision of the sequence of t | Dr. Jessi | ca Fleetwood | |
| | Next downstation | Date " 27/14/2013 en 21/04/2014 | |
| Comparison Comparison <td></td> <td></td> <td></td> | | | |
| Approach" ditability Prease approx to adjoint approxiter its. Approxiter it adjoint adjoint approxiter its. Approxiter it adjoint adjoint adjoint approxiters preasent at the meeting, (e.g. Pyou are an acadencia) please arear who they will be below. Approxiter it area | Organization will be taking place | thin which the appraisal | |
| Rease agenes in advances when year approximents. Agenesise: Agenesise: Agenesise: Agenesise: Siners: Agenesise: Siners: Agenesis: Siners: | Appreser's details | | |
| Rease a fait on the address book it ich as a laker your segmatest Appresser Appresser There are address present at the meeting, (e.g. Fyou are an academic) please enter who they will be below. Appresser's Name Appresser's Name Appresser's Enter Appresser's Enter Appresser's En | Plassa agree in advance who your appraiser is | | |
| Approximation Interfactor Interfactor Approximation Approximation Approximation Approximation Approximation Summarianty of yood/* Approximation Summarianty of yood/* Some these of these of these of these of these of the categories of the categories of these of these of these of these of the categories of these of th | Please click on the address book icon to select yo | air appraisar | |
| # Haves are gaining to be additional appraisers presence at the meeting, (eg. # you are an academic) please enserving to be additional appraisers presence at the meeting. (eg. # you are an academic) please enserving to be additional appraisers a familiary of your Appresent's Name Appresent's Carret Appresent's Carret < | | W | |
| Appraiser's Name Appraiser's Enset Summary of year Scope of work Bave these details Bave these details Bave these details Completed Completed Completed O Set Obstantion Probly Set Obstantion Probly Set Obstantion Probly O Destantion provement Active (e.g. Audt) O Supprise Active (e.g. Audt) O Septiment (c.POP) O Databut provement Active (e.g. Audt) O Septiment (externet septiment (c.POP) O Databut provement Active (e.g. Audt) O Feedback from categories O Revice of completers (c.Pom) < | If there are going to be additional appraisers press | ant at the meeting, (eg. If you are an academic) please enter who they will be below. | |
| Appressive S Name Appressive S Creat Sever these details Sever these details Sever these details Sever these details Sever these details Sever these details Table is the hitermontion your will read to complete your appraisal. Some of the carageries do not need to be collected every year. Sever these details Table is the hitermontion your will read to complete your appraisal. Some of the carageries do not need to be collected every year. Sever these details Completed Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermontion Sever these hitermont these explicities Sever these explicities Sever these explicities | Appraiser's Name | Appraiser's Email | |
| Summary of your supporting information Base these details State information Base of work | Appraiser's Name | Appraiser's Email | |
| Source these details Source of the source | | | |
| Summary of your supporting information Scope of work The last Information your suppresest. Some of the categories do not need to be calected every year. Correct Year's PortStice Correct Year | | | |
| Summary of your supporting information Boops of work Table is the information your will read to complete your appraisal. Some of the categories do not need to be collected every year. Current Year's Portfolio Completed Set Ordenation Health Set Ordenation Probly Set Ordenation Probly Outling professional development. (DPD) Continuing professional development. (DPD) Continuing professional development. (DPD) Significant events Precodaction From colleguess | | | Save these details |
| Supporting information Boops of work Table information your appraisal. Some of the categories do not need to be collected every year. Current Year's Portfolio Completed Completed Set Decleration Health Set Decleration Health Set Decleration Probly Bracenal Development (Pan (PDP) Continuing professional development (CPO) Continuing professional development (CPO) Construction Proble Significant events Personal Development Activity (k.g., Audit) Personal Development Activity (k.g., Audit) Personal Development Activity (k.g., Audit) Personal Development Activity (k.g., Budit) Personal Develo | | | |
| This is the information your will need to complete your appraisal. Some of the categories do not need to be collected every year. Current Year's Portfolio Completed Set Declaration Heath Set Declaration Probly Personal Development (Pin (PDP) Clure Clure <td>Summary of your</td> <td></td> <td></td> | Summary of your | | |
| Current Year's Portfolio Completed Personal Image: Set Declaration Probly Image: Set De | Summary of your supporting information | Scope of work | |
| Complete Co | Summary of your supporting information | Scope of work | |
| Completed Function Funct | Summary of your supporting information | Scope of work | |
| Precent Sel Declaration Health Sel Declaration Probly Precond Development Plan (PDP) CMC Continuing professional development (CPD) Continuing professional development (CPD) Significant events Significant events Precodeck from collesques | Summary of your supporting imformation This is the information you will need to complete yo Current Year's Portfolio | Scope of work | |
| Sail Declaration Freach Image: | Summary of your supporting information This is the information your will need to complete yo Current Year's Portfolio Completed | Scope of work eer appraixal. Some of the categories do not need to be collected every year. | |
| Said Declaration Problety Image: Second Development, Plan (PDP) Image: Second Development, Plan (PDP) Image: Second Development, Plan (PDP) Image: Second Development, Second Dev | Summary of your supporting information This is the information you will need to complete yo Current Year's Portfolio Compilated | Boope of work our appraixal. Some of the categories do not need to be collected every year. | |
| Concinuing professional development (CPO) Continuing professional development (CPO) Cuality Improvement Activity (e.g. Audi) Significant events Feedback from collesgues Feedback from collesgues Feedback from collesgues Review of complements | Summary of your supporting information This is the information your will need to complete you Current Year's Postfolio Completed Personal Self Declaration Health | Scope of work | |
| Continuing professional development (CPO) Continuing professional devel | Summary of your supporting information Tale is the information your will need to complete yo Current Yeer's Partfolio Completed Information Health Self Declaration Health Self Declaration Probley | Scope of work | |
| Cuality Improvement Activity (k.g. Audt) Significant events Freedback from colleegues Freedback from patients (where applicable) Review of completing and complements | Rummary of your supporting information This is the information your will need to complete yo Current Year's Portfolio Completed Personal Sair Decleration Health Sair Decleration Probity Personal Development. Plan | Scope of work ear appraixal. Some of the categories do not need to be collected every year. | |
| Significant eventa Significant eventa Feedback from colleegues Feedback from patients (where applicable) Review of compliants and compliments | Summary of your supporting information This is the information you will need to complete yo Current Year's Portfolio Completed Personal Self Declaration Health Self Declaration Probly Personal Development Plan CINC Controlling professional fead | Scope of work our appraixal. Some of the categories do not need to be collected every year. | |
| Feedback from colleagues Feedback from gallerits (where applicable) Feedback from gallerits and complements Review of complemints and complements | Summary of your supporting information Trik is the information you will need to complete yo Current Year's Portfolio Completed Self Decleration Probly Self Decleration Probly Personal Development Plan I COMC Continuing professional devel | Scope of work or appraixal. Some of the categories do not need to be collected every year. (POP) spmert. (CPO) (Scope Acd3) | |
| Feedback from patients (where applicable) Review of complexits and complements | Summary of your supporting information Tals is the information your will need to complete yo Current Yeer's Pacificitie Completed Presonal Self Decleration Health Self Decleration Probly Personal Development Plan CURC Continuing professional devel Currently Improvement Activity Significant events | Scope of work our appraixal. Some of the categories do not need to be collected every year. (POP) poment (CPD) ((a.g. Audi) | |
| Review of completing and complements | Remmany of year supporting information This is the information year will need to complete yo Compiled Compiled Self Declaration Health Self Declaration Probity Personal Development, Plan (Continuing professional devel Continuing professional devel Continuing professional devel Continuing professional devel Continuing professional devel Self Declaration Front College | Scope of work sor appraisal. Some of the categories do not need to be collected every year. (POP) spment. (CPO) y (e.g. Audit) | |
| | Summary of year supporting information Trik is the information year will need to complete yo Current Year's Portfolio Completed Personal Development Plan CMC Continuing professional devel Continuing professional devel Continuing professional devel Continuing professional devel Continuing professional devel Continuing professional devel Feedback from colleagues Feedback from colleagues | Scope of work example a second state of the categories do not need to be collected every year. (POP) bornert (CPO) y (e.g. Audi) ere explicable(| |