

## **Step 1**

You will receive 2 emails from [Lucy@equiniti360clinical.com](mailto:Lucy@equiniti360clinical.com). 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 on-going 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.

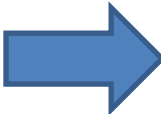
Login at the following location: <https://www.equiniti360.com>

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**

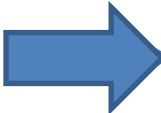
User name:\*  [? Forgotten your username?](#)

Password:\*  [? Forgotten your password?](#)

If this is your first time logging in, you will find your user name and start up password on your welcome email. Please do not confuse this with your activation code.

**Sign In**

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



**Terms of Use and Privacy Policy** Page 1 of 3

**Consent Statement**

1. You have been granted access to this Revalidation Management System to enter data and upload documents containing information about you. This will be information to support and demonstrate your maintenance of clinical and professional standards, and where applicable any specialist skills.

2. Other information about you will be entered into the Revalidation Management System by:

- Your responsible officer ("Responsible Officer") assigned to you by your designated body, the NHS Commissioning Board, your LETB, the armed forces, your locum agency, the healthcare provider you have practising privileges with, your faculty or society or other persons designated by the GMC to fulfil the responsible officer function or such organisations as may be appointed by the GMC from time to time to assign a responsible officer to you

☐ I agree with the Terms of Use and Privacy Policy

**Cancel** **Next**

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

**Setup Security Question and Answer**Page 2 of 3

Activation code:\*

?

Your activation code can be found on a separate email

Security question:\*

?

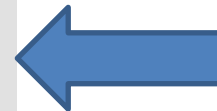
You need to create a question that only you know the answer to that the system can ask you in the event that your forget your password

Secret answer:\*

?

Cancel

Next



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

**Change Password**Page 3 of 3

User name:

Craig1953

New password:\*

?

Re-enter password:\*

?

You are required to create a password with a minimum of 8 characters, and no more than 15 characters. For security reasons this must contain at least one upper case letter, lower case letter, number and non-alphanumeric character (e.g. !)

Please now keep your username and password somewhere safe so that you can find it when you log in next time, which may not be for a couple of months.

Cancel

Next

## Step 2

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.

Home **Profile** Portfolio My Progress Appraisal Revalidation My Account My Doctors Help

### Edit Profile [View Your Profile](#)

**Personal Details** Professional Details Additional Details Contacts Scope of work Qualifications/Posts Appraisal Details

Please fill in the relevant information. There are seven short sections. Some boxes may have already been completed for you. Please alter any incorrect details and complete any gaps.

**Your Personal Details**

Title \*

First Name \*

Last Name \*

DOB \*  eg. 15/07/1961

Email \*

Phone \*

Main Speciality \*

Other Specialities

GMC Number \*

Add Profile Photo

**Next**

### Step 3

Uploading documents. Click portfolio and Upload supporting information button

Home Profile **Portfolio** My Progress Appraisal Revalidation My Account My Doctors Help

### Your Portfolio

**Upload Supporting Information** Export Portfolio Bulk Change SI Status

Portfolio Overview	
View full portfolio	0
Supporting information to be filed	0
Additional supporting information	0
<b>Core Supporting Information</b>	
<b>Personal</b>	
Self Declaration Health	0
Self Declaration Probity	0
Personal Development Plan (PDP)	0
<b>GMC</b>	
Continuing professional development (CPD)	0
Quality improvement activity (e.g. Audit)	0
Significant events	0
Feedback from colleagues	0
Feedback from patient (where applicable)	0
Review of complaints and compliments	0
<b>Organisation</b>	
Job Planning	0
Management	0
Research	0
Teaching	0
Mandatory training	0
Clinical Governance	0
External work	0

Supporting Information			
Title	Type	Status	Expires

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

The screenshot shows the 'Upload Supporting Information' form. A blue arrow points to the 'Attach Document' button. Another blue arrow points to the dropdown menu for selecting the type of supporting information, which includes options like 'Quality improvement activity (e.g. Audit)', 'Unfiled', 'Additional supporting information', 'Self Declaration Health', 'Self Declaration Probity', 'Personal Development Plan (current & new draft)', 'Continuing professional development (CPD)', 'Significant events', 'Feedback from colleagues', 'Feedback from patients (where applicable)', and 'Review of complaints and compliments'. A third blue arrow points to the large text box labeled 'TYPE REFLECTIVE NOTES HERE'. The form also includes fields for 'Status of document', 'Document valid from', 'Retention period', and 'Value of document (optional)'. At the bottom, there are buttons for 'Cancel', 'Save & Close', 'Save & Add New', and 'Review GMP Mapping'.

In the big text box type your reflective notes.

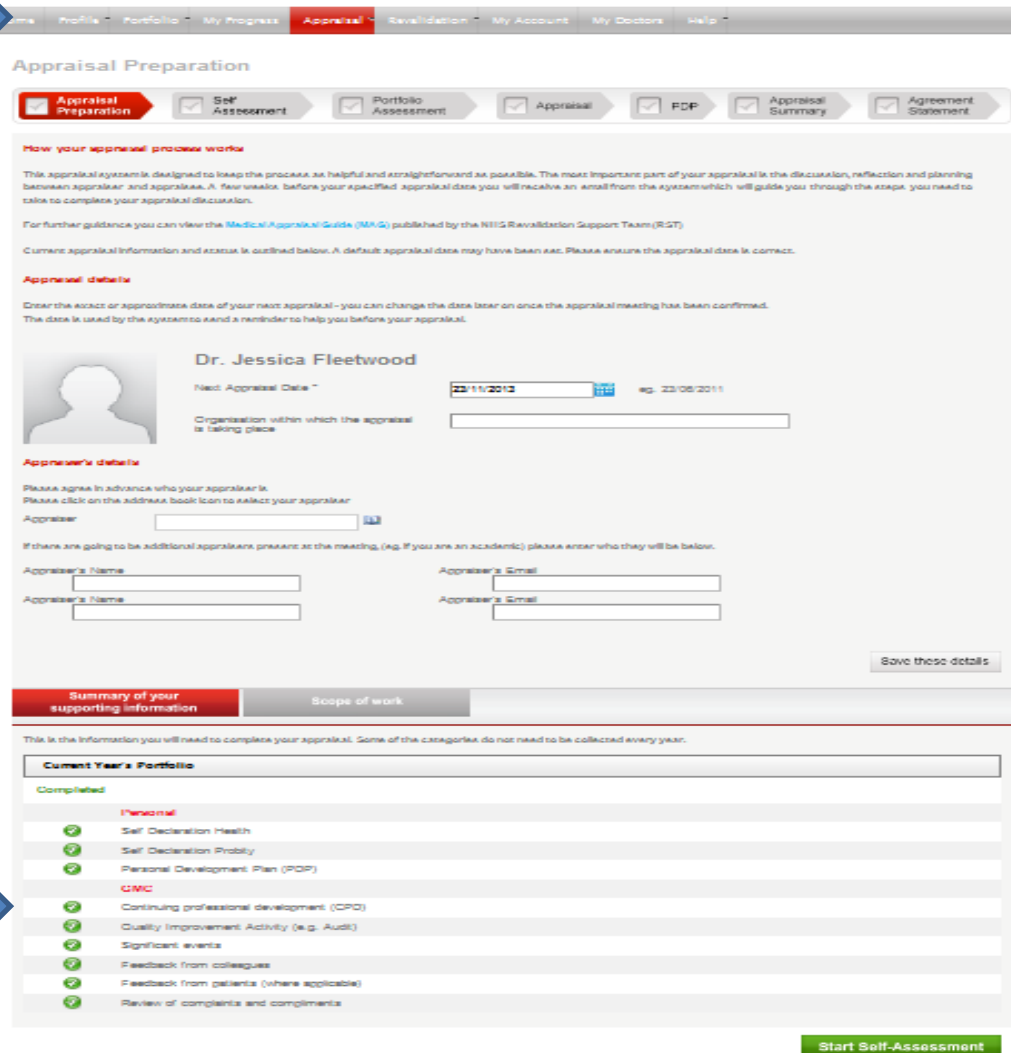
To complete your portfolio click on Health declaration and Probity declaration one at a time and complete the declarations

The screenshot shows the 'Supporting information' table. A blue arrow points to the 'Health Declaration' and 'Probity Declaration' rows. The table has columns for 'Title', 'Type', 'Status', 'Expires', and 'Reflective Notes'. The 'Health Declaration' row is highlighted, and the 'Probity Declaration' row is also highlighted. The table lists various supporting information items, including 'Health Declaration', 'Probity Declaration', 'Concerns over patient care', '360 Patient feedback', 'CPD 2012', 'PDP 2013', 'Management for all', 'Colleague feedback', 'Audit results', 'Teaching Guidance', 'Planning list', 'St Johns Ambulance', 'Research Guidance', and 'Training'.

Title	Type	Status	Expires	Reflective Notes
Health Declaration	Self Declaration Health	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
th	Significant events	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Probity Declaration	Self Declaration Probity	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Concerns over patient care	Significant events	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
360 Patient feedback	Feedback from patients (where applicable)	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
CPD 2012	Continuing professional development (CPD)	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
PDP 2013	Personal Development Plan (current & new draft)	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Management for all	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Colleague feedback	Feedback from colleagues	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Audit results	Quality improvement activity (e.g. Audit)	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Teaching Guidance	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Planning list	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
St Johns Ambulance	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Research Guidance	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>
Training	Unfiled	Published		<a href="#">EditFile</a> <a href="#">Delete</a>

## STEP 4

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



The screenshot shows the 'Appraisal Preparation' page. At the top, a navigation bar includes 'Home', 'Profile', 'Portfolio', 'My Progress', 'Appraisal' (highlighted with a blue arrow), 'Revalidation', 'My Account', 'My Doctors', and 'Help'. Below the navigation bar, a progress bar shows steps: 'Appraisal Preparation' (checked), 'Self Assessment', 'Portfolio Assessment', 'Appraisal', 'FDP', 'Appraisal Summary', and 'Agreement Statement'. The main content area is titled 'How your appraisal process works' and includes instructions. Below this, the 'Appraiser details' section contains a profile picture placeholder, the name 'Dr. Jessica Fleetwood', a 'Next Appraisal Date' field with a calendar icon (showing 22/11/2013), and a text field for the 'Organisation within which the appraisal is taking place'. The 'Appraiser's details' section includes a 'Please agree in advance who your appraiser is' note, a 'Please click on the address book icon to select your appraiser' instruction, and fields for 'Appraiser' (with a dropdown icon), 'Appraiser's Name', and 'Appraiser's Email'. A 'Save these details' button is at the bottom right of this section. The 'Summary of your supporting information' section has two tabs: 'Summary of your supporting information' (active) and 'Scope of work'. Below the tabs, a table titled 'Current Year's Portfolio' shows a list of categories with green checkmarks indicating completion. A blue arrow points to this table. At the bottom right, a green 'Start Self-Assessment' button is highlighted with a blue arrow.

Home Profile Portfolio My Progress **Appraisal** Revalidation My Account My Doctors Help

### Appraisal Preparation

☒ Appraisal Preparation ☐ Self Assessment ☐ Portfolio Assessment ☐ Appraisal ☐ FDP ☐ Appraisal Summary ☐ Agreement Statement

**How your appraisal process works**


This appraisal system is designed to keep the process as helpful and straightforward as possible. The most important part of your appraisal is the discussion, reflection and planning between appraiser and appraisee. A few weeks before your specified appraisal date you will receive an email from the system which will guide you through the steps you need to take to complete your appraisal discussion.


For further guidance you can view the [Medical Appraisal Guide \(MAG\)](#) published by the NIS Revalidation Support Team (RST).

Current appraisal information and status is outlined below. A default appraisal date may have been set. Please ensure the appraisal date is correct.

**Appraiser details**

Enter the exact or approximate date of your next appraisal - you can change the date later on once the appraisal meeting has been confirmed. The date is used by the system to send a reminder to help you before your appraisal.

 **Dr. Jessica Fleetwood**

Next Appraisal Date   eg. 23/05/2011

Organisation within which the appraisal is taking place

**Appraiser's details**

Please agree in advance who your appraiser is. Please click on the address book icon to select your appraiser.

Appraiser

If there are going to be additional appraisers present at the meeting (eg. if you are an academic) please enter who they will be below.

Appraiser's Name  Appraiser's Email

Appraiser's Name  Appraiser's Email

**Summary of your supporting information** Scope of work

This is the information you will need to complete your appraisal. Some of the categories do not need to be collected every year.

Current Year's Portfolio
<b>Completed</b>
<b>Personal</b>
<input checked="" type="checkbox"/> Self Declaration Health
<input checked="" type="checkbox"/> Self Declaration Probity
<input checked="" type="checkbox"/> Personal Development Plan (PDP)
<b>GMC</b>
<input checked="" type="checkbox"/> Continuing professional development (CPD)
<input checked="" type="checkbox"/> Quality Improvement Activity (e.g. Audit)
<input checked="" type="checkbox"/> Significant events
<input checked="" type="checkbox"/> Feedback from colleagues
<input checked="" type="checkbox"/> Feedback from patients (where applicable)
<input checked="" type="checkbox"/> Review of complaints and compliments