

RMS USER GUIDE

Please use this guide if you are using the Revalidation Management System
If you can see the RMS logo and your organisation's logo at the top of your screen you are using the correct user guide

Version 17

Steps for the Doctor being Appraised

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Steps for the Appraiser

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Content

Steps for the Appraiser

Key:



Take Caution – Situations that could impact the completion of appraisal



Note – Notes, usage tips or additional information

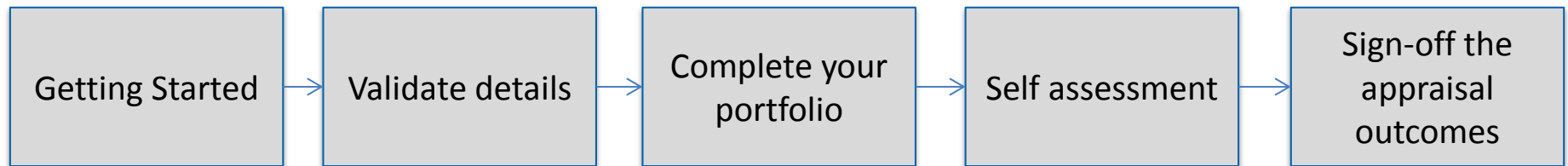


Refer to – The instruction number indicated

Steps for the Doctor being appraised

5 key steps need to be carried out in order to complete Appraisal

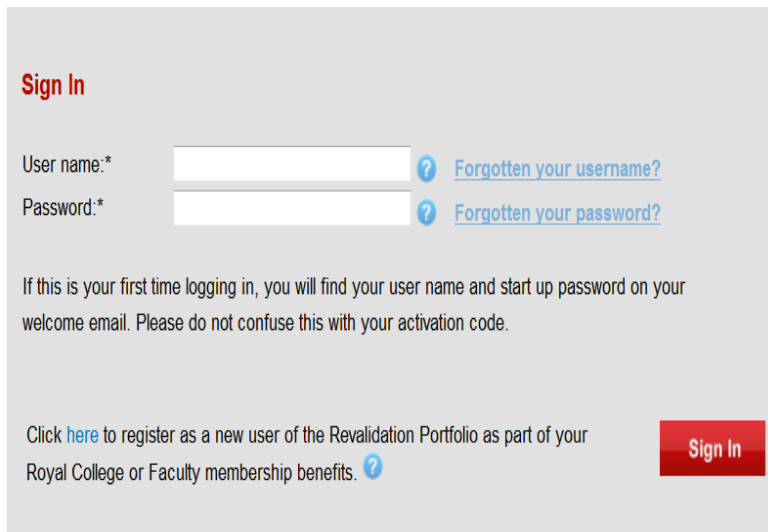
- 1 Get started - Activate your account and log on to the system
- 2 Validate your personal details in the profile section
- 3 Add your supporting information into your portfolio
- 4 Complete a self assessment three weeks before your appraisal date and update any information if necessary
- 5 Carry out your appraisal meeting with your appraiser and sign-off the process



Getting Started

Activating your account

- 1 You will receive **two** welcome emails from lucy@equiniti-ics.com – One with a username and password and another with your activation code. Click on the link in your email which will open the **Sign In** page.



The screenshot shows a 'Sign In' page with a light gray background. At the top left, the text 'Sign In' is displayed in red. Below it, there are two input fields: 'User name:*' and 'Password:*'. Each field has a blue question mark icon to its right, followed by a blue link: 'Forgotten your username?' for the user name field and 'Forgotten your password?' for the password field. Below the input fields, there is a paragraph of text: '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.' At the bottom left, there is a link: 'Click [here](#) to register as a new user of the Revalidation Portfolio as part of your Royal College or Faculty membership benefits.' followed by a blue question mark icon. On the bottom right, there is a red button with the text 'Sign In' in white.

- 2 Once you have logged into the site you will be given the opportunity to change your password and create a security question.



Please do read the terms and conditions. There are some very important pieces of information within them – including that it is *your* responsibility to ensure that no patient identifiable information is uploaded to the system.

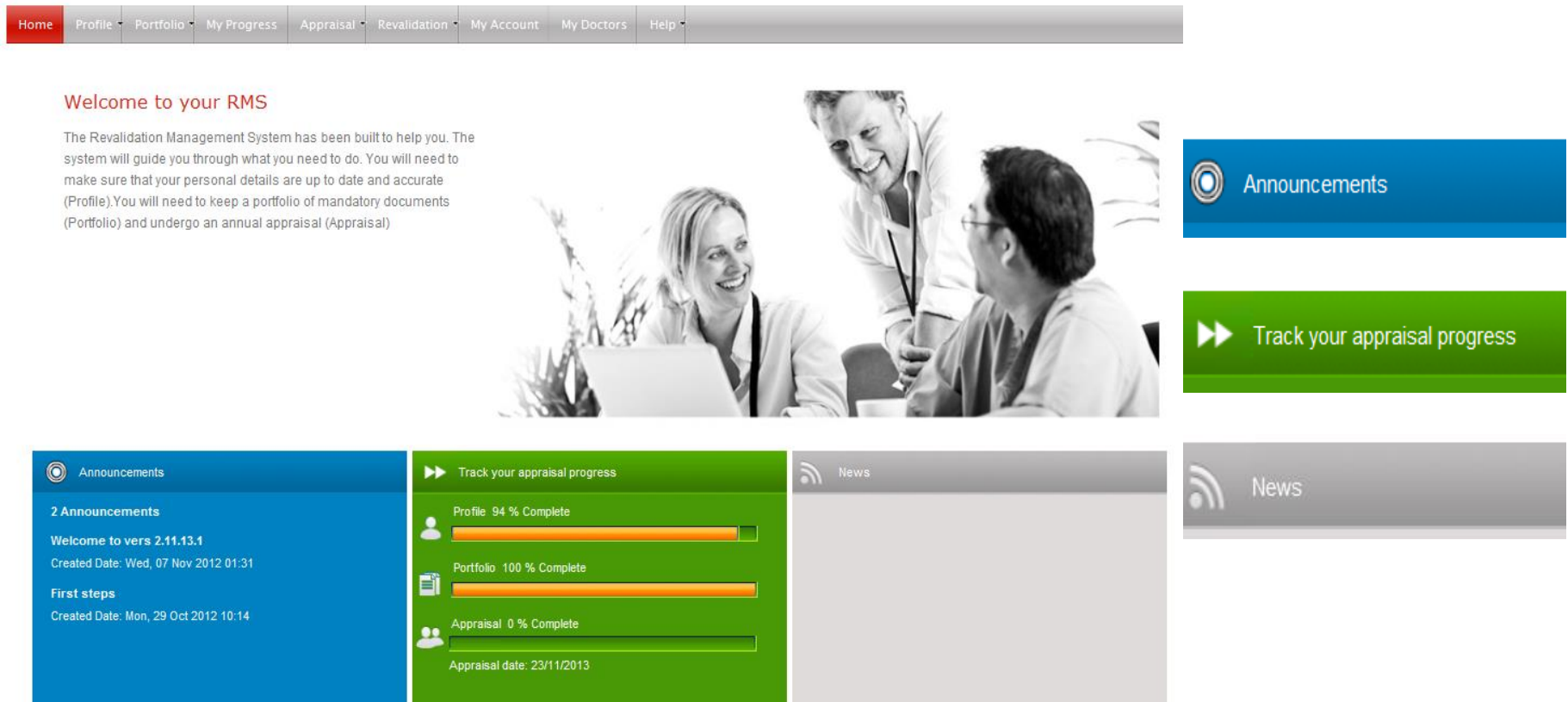


We suggest you copy and paste the complex password into the password field.

Getting Started

Home Screen

- 1 When logging into your account you will be directed to the RMS home screen. Information from your Trust will be fed into the Announcement section. You will also be able to track your progress using the central panel.



The screenshot displays the RMS Home Screen. At the top is a navigation bar with links: Home, Profile, Portfolio, My Progress, Appraisal, Revalidation, My Account, My Doctors, and Help. Below the navigation bar is a large banner area. On the left of the banner, it says "Welcome to your RMS" and provides a brief overview of the system. On the right of the banner is a photograph of three healthcare professionals. To the right of the banner are three large buttons: "Announcements", "Track your appraisal progress", and "News". Below the banner area, the screen is divided into three main sections. The left section, titled "Announcements", shows "2 Announcements" and lists two recent announcements with their dates. The middle section, titled "Track your appraisal progress", shows three progress bars: "Profile 94 % Complete", "Portfolio 100 % Complete", and "Appraisal 0 % Complete". It also shows the "Appraisal date: 23/11/2013". The right section, titled "News", is currently empty.

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

Welcome to your RMS

The Revalidation Management System has been built to help you. The system will guide you through what you need to do. You will need to make sure that your personal details are up to date and accurate (Profile). You will need to keep a portfolio of mandatory documents (Portfolio) and undergo an annual appraisal (Appraisal)

Announcements

2 Announcements

Welcome to vers 2.11.13.1

Created Date: Wed, 07 Nov 2012 01:31

First steps

Created Date: Mon, 29 Oct 2012 10:14

Track your appraisal progress

Profile 94 % Complete

Portfolio 100 % Complete

Appraisal 0 % Complete

Appraisal date: 23/11/2013

News

Getting Started

Validate details

Complete your portfolio

Self assessment

Appraisal and sign-off

Validating Your Details

Check the pre-populated information

1 Click the tab at the top of the page entitled **Profile** > **Edit Profile**



It will not allow you to proceed if you leave required fields blank (e.g. DoB) so please ensure you have filled in information for all fields with an asterisk (*) next to them.

2 Work your way through the chevrons by clicking the **next** button at the bottom of the screen once you have updated the required fields.

2



Next

Validating Your Details

Selecting a nominee



You can nominate someone to access your account and upload documents for you. The nominee will not have access rights to any of your appraisal outputs.

1 In order to select a nominee click on the address book icon next to the nominee box



2 A pop up window will appear. Input the nominee's name and search for them.

3 If they are not already on the system, click on the **Add Nominee** button and provide their details. Your nominee will then be sent log in emails.

EDIT PROFILE View Your Profile

Personal Details

Professional Details

Additional Details

Contacts

Scope of work

Qualifications/ Posts

Appraisal Details

Nominee ?

You may wish to nominate someone to act, on your behalf, as an administrator to your Revalidation Portfolio. This person could, for example, be your secretary or personal assistant. He or she will be able to upload your supporting information into the Revalidation Portfolio. However you are responsible for making sure all information is accurate and correct.

Nominee  Please click on the address book icon to select your nominee

Appraisal Lead(GP) / Clinical Director ?

Your designated body will have provided the list of names to choose from, if the person is not visible please contact your administration person or Equiniti 360 Clinical.

This person will be able to see your previous appraisal documents.

Appraisal Lead  Please click on the address book icon to select your Appraisal Lead/Clinical Director

Search Person

Page

Name Role

Email Address Designated Body

Name Designated Body


No records to display

If you cannot find your nominee, please click the Add Nominee button to add them to the system

V2.11.13.1

Validating Your Details

Appraisal Lead

1 In order to link with your appraisal lead click on the address book icon  next to Appraisal Lead

2 Click the search box, choose your appraisal lead and click **OK**

EDIT PROFILE [View Your Profile](#)



Nominee

You may wish to nominate someone to act, on your behalf, as an administrator to your Revalidation Portfolio. This person could, for example, be your secretary or personal assistant. He or she will be able to upload your supporting information into the Revalidation Portfolio. However you are responsible for making sure all information is accurate and correct.

Nominee  Please click on the address book icon to select your Nominee

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Your designated body will have provided the list of names to choose from, if the person is not visible please contact your administration person or Equiniti 360 Clinical.



This person will be able to see your previous appraisal documents.

Appraisal Lead  Please click on the address book icon to select your Appraisal Lead/Clinical Director 

Search Person

Page

GMC Number

Name Role  

Email Address Designated Body

Name	GMC Number	Designated Body
Dr. AinAppread Account	5464606	Aintree University Hospitals NHS Foundation Trust
Dr. Tom Beaumont	1111129	Aintree University Hospitals NHS Foundation Trust
Dr. Ross Hignett External Test	1111111	Aintree University Hospitals NHS Foundation Trust

Validating Your Details

Declaring scope of work

1 Add a description of the nature of the work you carry out at your primary place of work into the free text box.

2 Attach your job plans and add time PAs into the provided fields if applicable.

3 If you wish to add other places of work, click on **Add New Record** underneath the 'Other Places of Work' title.

4 Once you have clicked on **Add New Record** a pop up window will appear. Enter the required information into the provided free text boxes.

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

Scope Of Work

Describe primary practice at: Full time Cardiologist at Royal Hospital

Time PA's:

Job Plan: Attach Document

Other Places Of Work

+ Add New Record

Place Of Work	Description of Practice	Medical Director's Name	Medical Director's Email	Time Committed (PA's)	Job Plan
No records to display.					

0 items in 1 pages

Back Next

Maintain Other Place of Work

Page

Place of Work *

Description of Practice *

Medical Director Name (or Line Manager) *

Medical Director Email (or Line Manager) *

Time Committed (PA's)

Job Plan (optional)


Attach Document

Ok Cancel

! The GMC has stated that you need to declare all places of work - Specifically, anywhere which requires a licence to practice medicine. This may include locum work, private work and/or charity work.

Validating Your Details

Selecting appraisal information

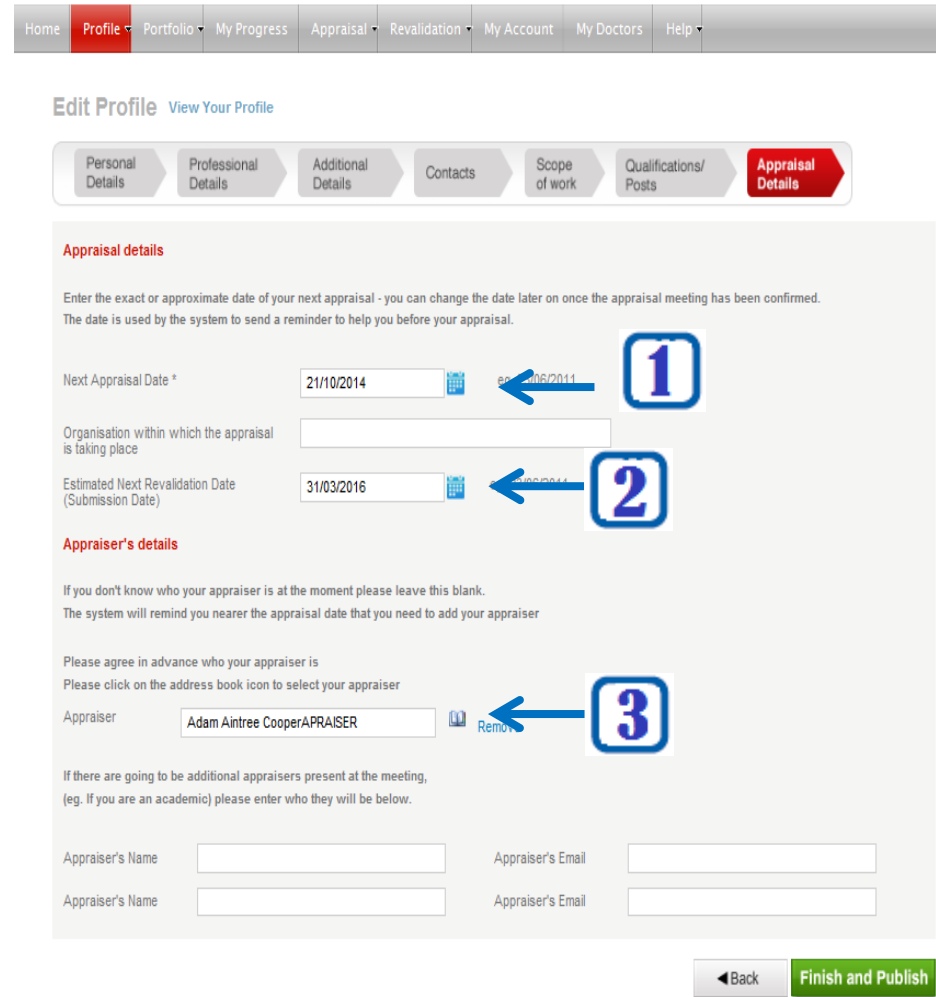
1 You will need to enter your correct appraisal date in order to proceed with the process – This can be changed later on. In order to select a date, click on the calendar icon  and select a date from the pop up calendar.

2 Enter your Revalidation Date as provided by the GMC.

3 If you know your Appraiser at this point you can select them by clicking on the address book icon.



If you are an academic and would like more than one Appraiser present at your appraisal, you have the option to include additional appraisers at the bottom of the screen, to record who was present.





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

Appraisal 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.

Next Appraisal Date * 21/10/2014   **1**



Organisation within which the appraisal is taking place

Estimated Next Revalidation Date (Submission Date) 31/03/2016   **2**

Appraiser's details

If you don't know who your appraiser is at the moment please leave this blank. The system will remind you nearer the appraisal date that you need to add your appraiser

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

Appraiser Adam Aintree CooperAPRAISER   **3**

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

Back Finish and Publish

Validating Your Details

Selecting your appraiser

1

Find your appraiser by typing their name/GMC number or email into the box and click search. Find the name you need and click OK

2

...If they don't appear then click **Add Appraiser** and complete the fields.

Search Person

Page

GMC Number

1 Name Role

Email Address Designated Body


Name	GMC Number	Designated Body
Dr. Andrew Ashley-Smith	0	Demonstration Area – Secondary Care – 1
Dr. Asif Atta	0	Demonstration Area – Secondary Care – 1
Dr. Sharon Binyon	022222	Demonstration Area – Secondary Care – 1
Dr. Harm Boer	0	Demonstration Area – Secondary Care – 1
Dr. Tim Cresswell	3337755	Demonstration Area – Secondary Care – 1
Dr. Tim Cresswell2	5557788	Demonstration Area – Secondary Care – 1
Dr. Peter Davies	9999999	Demonstration Area – Secondary Care – 1

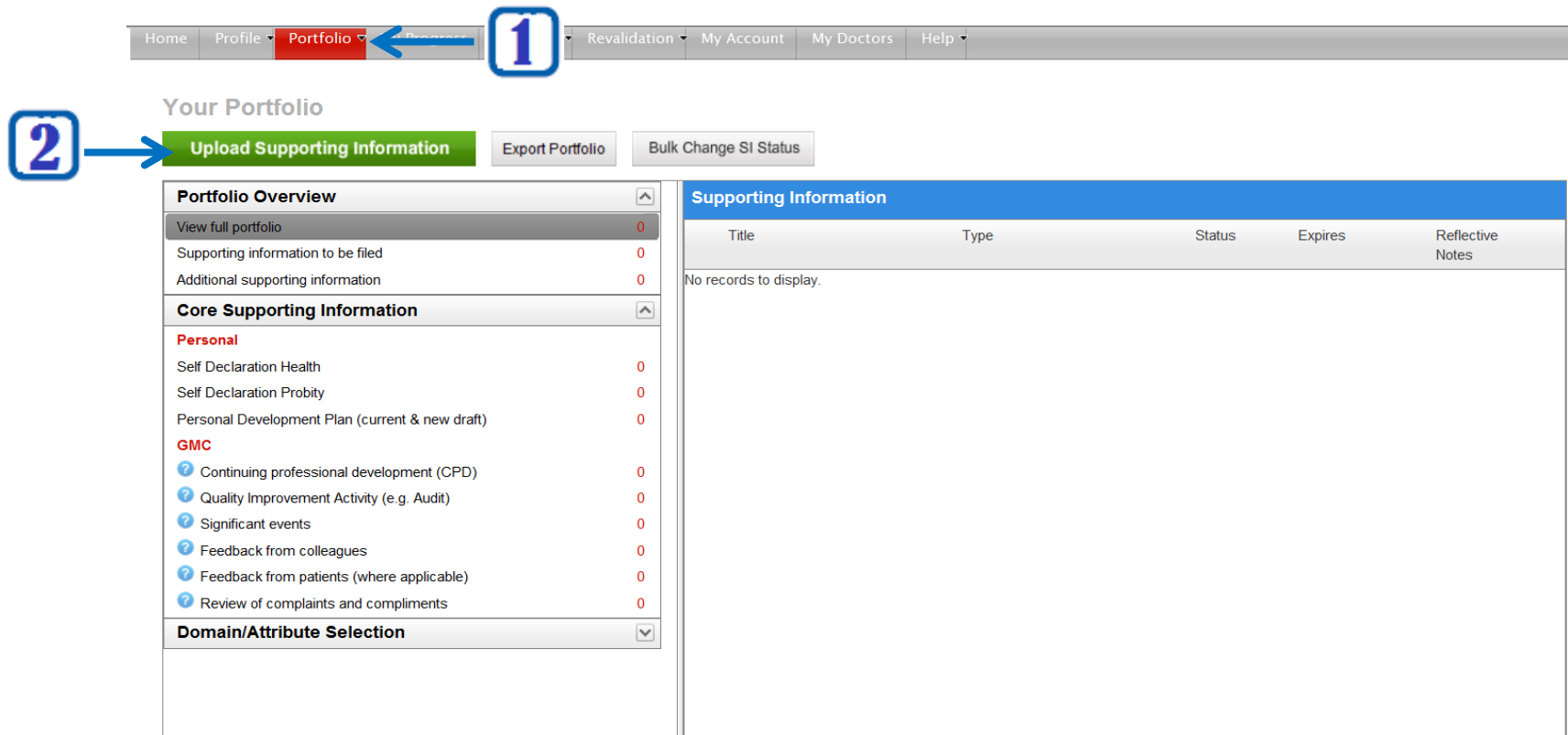
2 If you cannot find your appraiser, please click the Add Appraiser button to add them to the system

V2.15.5.0

Completing Your Portfolio

Uploading supporting information

- 1 Click the **Portfolio** tab at the top of the page once you are ready to begin uploading supporting evidence.
 - 2 Click the green **Upload Supporting Information** button.
-  Guidance for including mandatory GMC supporting information.



The screenshot shows the 'Your Portfolio' page. At the top, there is a navigation bar with tabs: Home, Profile, **Portfolio** (highlighted in red), Revalidation, My Account, My Doctors, and Help. A blue arrow points to the 'Portfolio' tab, labeled with a '1' in a blue box. Below the navigation bar, the 'Your Portfolio' section has a green 'Upload Supporting Information' button, which is highlighted with a blue arrow and labeled with a '2' in a blue box. To the right of this button are 'Export Portfolio' and 'Bulk Change SI Status' buttons. The main content area is divided into two columns. The left column contains a 'Portfolio Overview' section with a list of items and their counts: 'View full portfolio' (0), 'Supporting information to be filed' (0), and 'Additional supporting information' (0). Below this is a 'Core Supporting Information' section with a list of items and their counts: 'Personal' (Self Declaration Health: 0, Self Declaration Probity: 0, Personal Development Plan (current & new draft): 0), 'GMC' (Continuing professional development (CPD): 0, Quality Improvement Activity (e.g. Audit): 0, Significant events: 0, Feedback from colleagues: 0, Feedback from patients (where applicable): 0, Review of complaints and compliments: 0), and 'Domain/Attribute Selection'. The right column contains a 'Supporting Information' table with columns: Title, Type, Status, Expires, and Reflective Notes. The table is currently empty, showing 'No records to display.'

Completing Your Portfolio

Uploading supporting information

3 Choose your type of Supporting Information from the drop down list and name your document.

4 Click the **Attach Document** button which will open a screen allowing you to browse all the documents on the computer/device you are using.



Please note:-

Attached documents need to meet certain naming criteria. You may find it easier to re-save the document **without any punctuation** before uploading.

You do not have to upload a document on each occasion, you may wish just to reflect on you practise in the notes field.

Getting Started

Validate details

Complete your
portfolio

Self assessment

Appraisal and
sign-off

Completing Your Portfolio

Uploading supporting information

5 Uploaded documents will automatically be saved as 'Published'. Documents marked as published will be made available to your appraiser upon submission of your portfolio. Should you not wish to submit a document and keep it for your own records you can change the status to 'Draft'.

6 You will need to specify a retention period for documents that you want to remain in your portfolio beyond this appraisal. To do this click on the calendar symbol and select the date you wish to keep the document until from the pop up calendar window. Alternatively you can select 'to be used for the next appraisal only'.



Please see next page for Review GMP Mapping

Status of document

Document valid from*

Retention period*

to be used for the next appraisal only

to remain in my portfolio until

Cancel Save & Close Save & Add New Review GMP Mapping

Completing Your Portfolio

Assigning attributes to supporting information

1 All documents and reflective notes should be linked to attributes of *Good Medical Practice*. For the 6 GMC mandatory documents the system will automatically link supporting information to suggested attributes (These can be amended as appropriate), however for all other mandatory documents this mapping will need adding by the doctor.

2

Once you have chosen the appropriate GMP domains and attributes, click the green **File** button at the bottom right hand corner of the screen



If you are an Educational supervisor you may wish to file the same document in your Educational Supervisor's portfolio. You can do this by selecting the relevant folders in the left hand box and adding the ticks where relevant



The automated selection of domains and attributes were selected by all the Medical Royal Colleges.

Completing Your Portfolio

Uploading multiple documents

1 If you wish to upload more than one document at a time, click on the green **Upload Supporting Information** button on the Portfolio screen as before.

2 Click on the **Upload Multiple Documents** button on the top right hand corner of the next screen.

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

Upload Supporting Information

Type of Supporting Information:* Personal Development Plan (current & new draft)

Add title for Supporting Information:* PDP

Attach Document

PDP.2013.doc Remove

Documents with names containing the following will be rejected # € % & * : < > ? \ / { } ~.

Add reflective notes

Things i have achieved from last years PDP

- Statement A
- Statement B

Improvements to look into for this years PDP

Statement C
Statement D

Last years Appraisal took place on DD/MM/YYYY

2 → Upload Multiple Documents

Click the GMP Mapping button to review the default filing against the GMP framework

Do not add any patient identifiable information in documents or reflective notes

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

Completing Your Portfolio

Uploading multiple documents




- 3 Click on the **Attach Document** button. This will bring up a pop up window allowing you to browse all documents on your computer/device. Select the documents you wish to upload.
- 4 Select the type of supporting information you are uploading from the drop down menu.
- 5 Once happy with the selection of documents, click on the **Upload all documents** button

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

Upload Multiple Documents Upload Supporting Information

Use this section to upload multiple documents which you wish to file later.
The documents will be stored under the 'Documents still to be filed' section on the Portfolio page.
If you wish to just upload a single piece of Supporting Information click link above.

Attach Document

Type	Name	Size	
	Trust Policy example 3.pdf	267 KB	Remove
	Trust Policy example 4.pdf	266 KB	Remove
	Trust Policy Example 5.pdf	268 KB	Remove

Documents with names containing the following will be rejected # € % & * ; < > ?

Type of Supporting Information:

Upload all documents

Completing Your Portfolio

Bulk change SI status

1 You can change mass documents from draft to published or vice versa.. Click Bulk Change SI Status and a new window will appear.

2 Choose current status, select documents, new status then click OK. That will change them all in one go

The screenshot shows the 'Your Portfolio' page. At the top, there is a navigation bar with links: Home, Profile, Portfolio (highlighted), My Progress, Appraisal, Revalidation, and My Account. Below the navigation bar, the 'Your Portfolio' section has a green 'Upload Supporting Info' button, a blue box with the number '1' over it, an 'Export Portfolio' button, and a 'Bulk Change SI Status' button. Below these buttons is a 'Portfolio Overview' table with columns for 'View full portfolio', 'Supporting information to be filed', and 'Additional supporting information'. The 'Supporting Information' section is expanded, showing 'Personal' and 'GMC' categories with various items and their counts. A blue arrow points from the 'Bulk Change SI Status' button to the right.

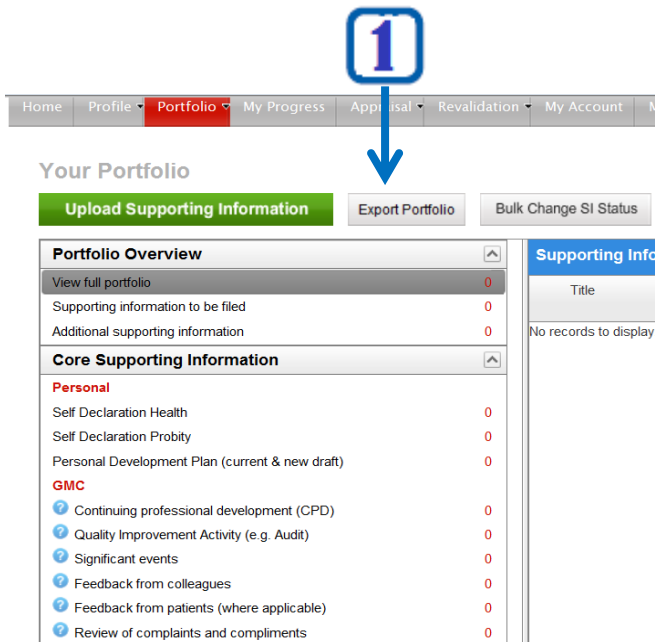
The screenshot shows the 'Bulk Change SI Status' dialog box. It has a title bar 'Bulk Change SI Status' and a 'Page' label. Below the title bar, there is a 'Current Status' dropdown menu with options: All, Draft, and Published. To the right of the dropdown are 'Select All' and 'Deselect All' buttons. Below the dropdown is a table with columns: Title, Type, Status, and Selected. The table is currently empty, showing 'No records to display.' Below the table is a 'New Status' dropdown menu with a 'Select' option. At the bottom right, there are 'Ok' and 'Cancel' buttons. A blue box with the number '2' is in the center of the dialog, with three blue arrows pointing to the 'Current Status' dropdown, the 'New Status' dropdown, and the 'Ok' button.

Completing Your Portfolio

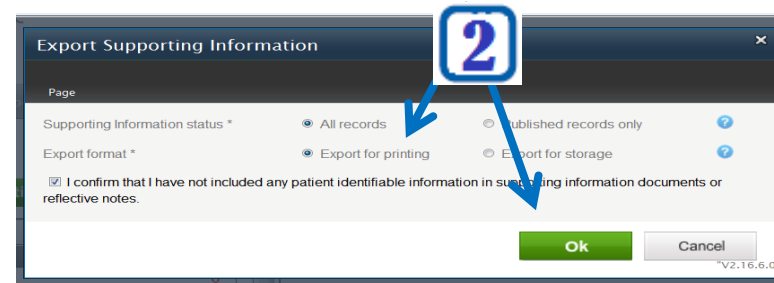
Exporting your portfolio

1 You can export your entire portfolio to have your own back up of the documents.

Click **Export Portfolio**



2 A separate window will open asking you what you want to export and is it for printing or storage. Make your choices and click **OK**



Completing Your Portfolio

Location of export file

- 1 Your export file will be stored in **My Account-My Exports**.
You can then download the file to your own PC or hard drive

The screenshot shows the 'My Account' page with a navigation bar at the top. The 'My Account' section includes a profile picture and personal details. Below this is the 'Account Details' section, which shows account type, date created, storage quota, and capacity. The 'My Exports' section contains a table with two rows of export files. A blue arrow with a circled '1' points to the 'Download' link in the first row of the 'My Exports' table.

My Account

Name: Mr. Louis Corbett
GMC Number: 0326987
Email Address: Louis.corbett@equiniti360clinical.com
Designated Body: Demonstration Area – Primary Care – 1
Main Royal College/Faculty: College of Emergency Medicine

Account Details

Account Type: RMS User
Date Created: 28/11/2012
Storage Quota: 0.04%
Total Capacity: 400 MB
Total Used: 0.16 MB

My Exports

Created Date	Description	Download	Delete
01/11/2013	Louis7856_Portfolio_20131101_141002.zip	Download	Delete
14/08/2013	Louis7856_Portfolio_20130814_151845.zip	Download	Delete

2 items in 1 pages

Completing Your Portfolio

Health and probity declaration

1 The health and probity declaration are carried out electronically. Click on **Portfolio > Health Declaration** or **Portfolio > Probity Declaration** for the health and probity declarations respectively.

2 Once you have made your self declaration, click the **Add to Portfolio** button at the bottom right hand corner of the screen. Your health and probity declarations will then automatically appear in your portfolio in the relevant sections.



The declarations should be made as close to the appraisal date as possible.

The screenshot shows the 'Health Self-Declaration Template' form. A blue arrow labeled '1' points to the 'Portfolio' menu in the top navigation bar, which is open, showing 'Health Declaration' and 'Probity Declaration' highlighted. A message dialog box titled 'Message from webpage' is displayed in the center, stating: 'All the information in this declaration is true to the best of my knowledge Dr. Jessica Fleetwood 23/11/2012. The Health Declaration completed will be added to your Portfolio.' The dialog has 'OK' and 'Cancel' buttons. On the right side of the form, a blue arrow labeled '2' points to the 'Add to Portfolio' button at the bottom right corner. The form itself contains text about health self-declaration and professional obligations.

Self Assessment

Completing your self assessment

- 1 3 weeks before your appraisal date you will receive a reminder to check your details are up-to-date and complete a self-assessment; this will come from lucy@equiniti-ics.com. To do this click the **Appraisal** tab at the top of the screen.
- 2 Check your appraisal date and appraiser details are correct and make any changes as necessary.
- 3 Begin the self assessment by clicking the green **Start Self Assessment** button at the bottom of the screen. This will open the self assessment screen.

The screenshot shows the 'Appraisal Preparation' screen. At the top, a navigation bar includes 'Home', 'Profile', 'Portfolio', 'My Progress', 'Appraisal' (highlighted with a blue arrow and a blue box with the number 1), 'Revalidation', 'My Account', 'My Doctors', and 'Help'. Below the navigation bar, a progress bar shows steps: 'Appraisal Preparation' (checked), 'Self Assessment' (checked), 'Portfolio assessment' (active), 'Appraisal' (checked), 'PDP' (checked), 'Appraisal Summary' (checked), and 'Agreement Statement' (checked). The main content area is titled 'How your appraisal process works' and contains text about the appraisal system. Below this, there is a section for 'Appraiser's details' with a form for 'Dr. Jessica Fleetwood'. The form includes fields for 'Next Appraisal Date' (23/11/2012), 'Organisation within which the appraisal is taking place', and 'Appraiser' (a dropdown menu). There are also fields for 'Appraiser's Name' and 'Appraiser's Email'. A blue arrow and a blue box with the number 2 point to the 'Appraiser' dropdown menu. At the bottom of the screen, there is a 'Summary of your supporting information' section with a 'Current Year's Portfolio' table. The table has columns for 'Completed' and 'Personal'. The 'Personal' section includes 'Self Declaration Health', 'Self Declaration Probity', and 'Personal Development Plan (PDP)'. The 'GMC' section includes 'Continuing professional development (CPD)', 'Quality Improvement Activity (e.g. Audit)', 'Significant events', 'Feedback from colleagues', 'Feedback from patients (where applicable)', and 'Review of complaints and compliments'. A blue arrow and a blue box with the number 3 point to the 'Start Self-Assessment' button at the bottom right.


...Self Assessment cont.

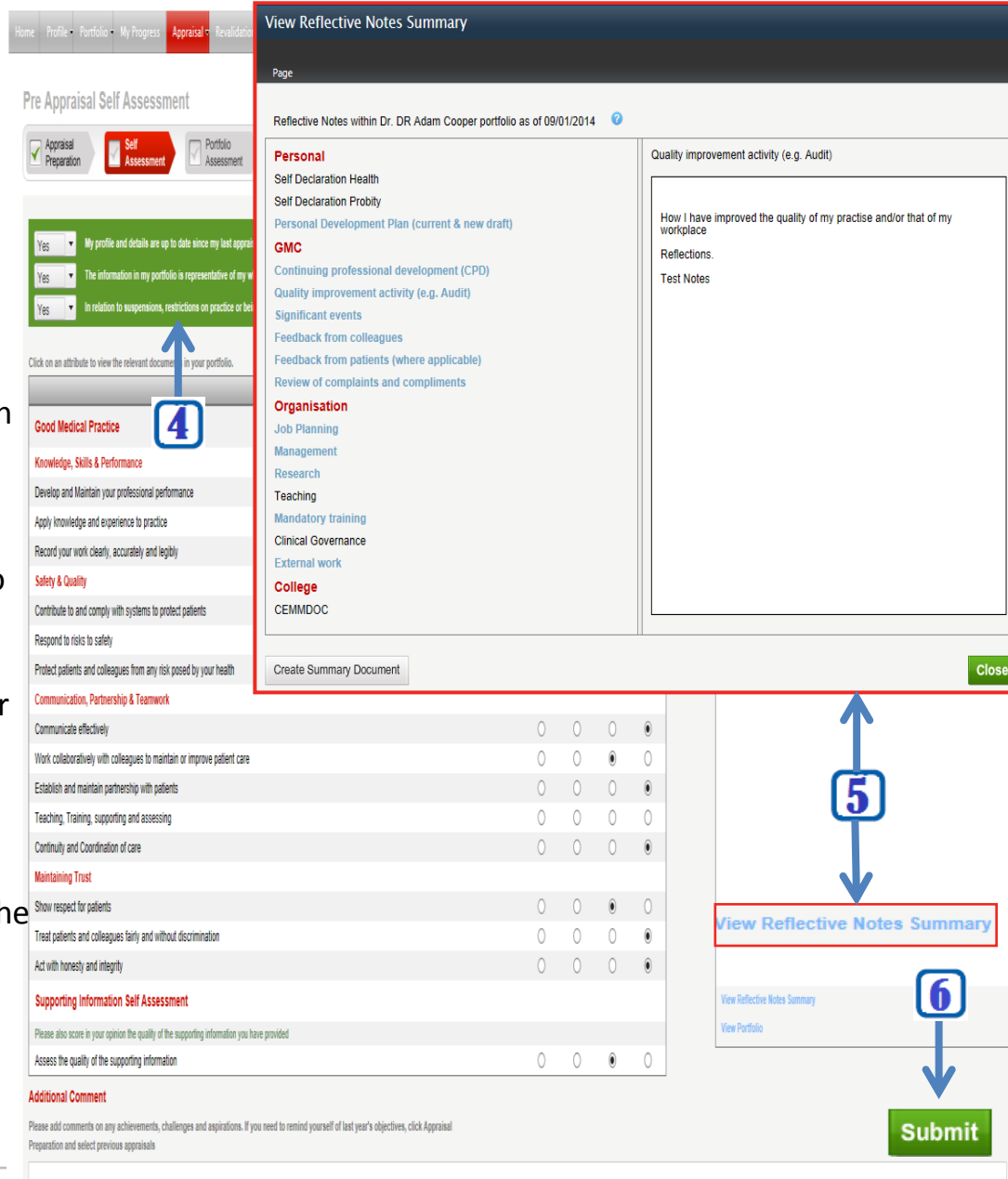
Completing your self assessment

4 Once the Self Assessment screen appears complete the 3 declarations at the top and then rate yourself from poor to excellent against each statement. Once completed your Appraiser will then be able to view your supporting information along with the completed self-assessment.

5 Click [View Reflective Notes Summary](#) to review a summary of all your reflective notes according to document type (Optional).

6 To Complete and send portfolio to your appraiser click 'submit'

 All uploaded information will be accessible from the self assessment page. If you click on one of the titles on the left hand side of the screen, the supporting information will appear in the box on the right hand side.



Home Profile Portfolio My Progress Appraisal Revalidation

Pre Appraisal Self Assessment

Appraisal Preparation **Self Assessment** Portfolio Assessment

Yes My profile and details are up to date since my last appraisal
 Yes The information in my portfolio is representative of my work
 Yes In relation to suspensions, restrictions on practice or behaviour

Click on an attribute to view the relevant documents in your portfolio.

Good Medical Practice

Knowledge, Skills & Performance

Develop and Maintain your professional performance
 Apply knowledge and experience to practice
 Record your work clearly, accurately and legibly

Safety & Quality

Contribute to and comply with systems to protect patients
 Respond to risks to safety
 Protect patients and colleagues from any risk posed by your health

Communication, Partnership & Teamwork

Communicate effectively
 Work collaboratively with colleagues to maintain or improve patient care
 Establish and maintain partnership with patients
 Teaching, Training, supporting and assessing
 Continuity and Coordination of care

Maintaining Trust

Show respect for patients
 Treat patients and colleagues fairly and without discrimination
 Act with honesty and integrity

Supporting Information Self Assessment

Please also score in your opinion the quality of the supporting information you have provided
 Assess the quality of the supporting information

Additional Comment

Please add comments on any achievements, challenges and aspirations. If you need to remind yourself of last year's objectives, click Appraisal Preparation and select previous appraisals

View Reflective Notes Summary

Reflective Notes within Dr. DR Adam Cooper portfolio as of 09/01/2014

Personal

Self Declaration Health
 Self Declaration Probity
 Personal Development Plan (current & new draft)

GMC

Continuing professional development (CPD)
 Quality improvement activity (e.g. Audit)
 Significant events
 Feedback from colleagues
 Feedback from patients (where applicable)
 Review of complaints and compliments

Organisation

Job Planning
 Management
 Research
 Teaching
 Mandatory training
 Clinical Governance

External work

College

CEMDOC

Quality improvement activity (e.g. Audit)

How I have improved the quality of my practise and/or that of my workplace
 Reflections.
 Test Notes

Create Summary Document

Close

View Reflective Notes Summary

View Reflective Notes Summary
 View Portfolio

Submit

Appraisal

The appraisal process will be facilitated by your appraiser

1 Appraiser starts appraisal meeting from their RMS account



Start Appraisal



The next step is to meet at the appraisal meeting.

On the day of the appraisal, please confirm the details below are correct, and click the Start Appraisal button to start the appraisal process.

Appraiser's details

Key appraiser's name Dr. Tim Cresswell

Key appraiser's email tim.cresswell@equiniti360clinical.com


Appraiser's name

Appraiser's email

Appraiser's name

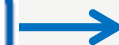
Appraiser's email

Appraisal details

Appraisal date *  eg. 17/06/2011

Organisation within which the appraisal is taking place

1



Start Appraisal

Getting Started

Validate details

Complete your
portfolio

Self assessment

Appraisal and
sign-off

Appraiser Statements

Agree to the outcomes of your appraisal

1 After the appraisal meeting your appraiser will make statements based on your discussion and the supporting information provided; you will be able to see these statements once you **login to your account after the appraisal.**

2 You will then need to declare that you are in agreement with the PDP and confirm your responsibility for the information provided by completing the Appraiser Statements before you **leave your own feedback.**

Agreement Statement

N.B Please read the summary box below and tick the statement at the bottom of this page

☐ Yes An appraisal has taken place that reflects the whole of the doctor's scope of work and addresses the principles and values set out in the Good Medical Practice

☐ Yes I understand that I must protect patients from risk of harm posed by another colleague's conduct, performance or health. The safety of patients must come first at all times. If I have concerns that a colleague may not be fit for practice, I am aware that I must take appropriate steps without delay, so that concerns are investigated and patients protected where necessary

1. The doctor's fitness to practice

☐ No information has been presented or discussed in the appraisal that raises a concern about the doctor's fitness to practise

☐ The doctor has provided information that raises some concerns. Further investigation or action is required. There may be an issue that affects patient safety or quality of the information

☐ There is insufficient information for an assessment to be made

2. The doctor's progress in collecting information for revalidation

☐ Appropriate supporting information has been presented in accordance with the Good Medical Practice Framework for Appraisal and Revalidation and this reflects the nature and scope of the doctor's work

☐ The doctor has provided some information but this is insufficient and raises concerns about the doctor's progress towards revalidation. Further action, support or investigation is required

☐ There is insufficient information for an assessment to be made

3. The doctor's progress towards last year's PDP

☐ A review that demonstrates appropriate progress against last year's personal development plan has taken place

☐ The doctor has engaged with and made progress with key elements in the previous year's development plan

☐ The doctor has not engaged with or made progress with the previous year's development plan. Further action, support or investigation is required

☐ There is insufficient information for an assessment to be made

4. PDP Agreement

☐ Yes An agreement has been reached with the doctor about a new personal development plan and any associated actions for the coming year

5. Summary of the appraisal discussion

Attribute	Summary Of Discussion
Develop and Maintain your professional performance	Develop and Maintain your professional performance View

1 items in 1 pages

6. Comments

comments

Appraiser Statement

☐ I agree with the content of the PDP and the summary of the appraisal discussion [View PDP](#)

☐ I declare personal accountability for the supporting information and commentary presented

☐ I declare that my profile (Personal details) are up to date

The doctor may use this space to respond to the above statements made by the appraiser. The Responsible Officer will review comments made in this space

[Concerns - Refer to RO](#) [Submit Appraisal](#)

Appraisal Feedback and Sign-Off

1 You will be asked to leave feedback for your appraiser by rating their skills and providing any relevant comments.

2 If you have any concerns about your appraisal you can click the red **Concerns – Refer to RO** button. This will halt the process and direct your concerns to your RO.

3 If you are happy with the appraisal and have left your feedback, click **Submit Appraisal** to finalise.

Please provide feedback for your appraiser

This feedback will be anonymous and shared with your Appraisal Lead and Responsible Officer

	Unable to comment	Poor	Borderline	Satisfactory	Good	Very Good
Establishing rapport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Demonstrating thorough preparation for your appraisal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to you and giving you time to talk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving constructive and helpful feedback	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Challenging you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping you to review your practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping you to identify gaps and improve your portfolio of supporting information for revalidation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping you to review your progress against your Personal Development Plan (PDP)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping you to produce a new PDP that reflects your development needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

Concerns - Refer to RO

Submit Appraisal

Getting Started

Validate details

Complete your
portfolio

Self assessment

Appraisal and
sign-off

Closing Your Revalidation Cycle

1 To close your Revalidation Cycle click Revalidation (in red) then edit.

2 Click on Revalidated then enter the date of Revalidation.

3 Ensure you have completed the **Estimated Next Revalidation Date**. Then click OK at the bottom of the screen.

This will ensure your current cycle is closed and your new cycle is opened.



Please ensure your profile is complete and your cycle start date has been entered.

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

Maintain Revalidation Cycles

Estimated Next Revalidation Date (Submission Date): 31/03/2016

Revalidation Cycles Locked: ☐

Cycle Start Date	Revalidation Date	RO Name	RO Email	RO Recommendation	Status
14/11/2013		Dr. NeilROSC1 Maciver	neil.maciver@equiniti360clinical.com		Open
31/03/2011	13/11/2013	Dr. NeilROSC1 Maciver	neil.maciver@equiniti360clinical.com	F	Revalidated

1 → Edit Delete Edit

Maintain Revalidation Cycle

Appraisals and when you create a new cycle, the relevant appraisals contained within the new revalidation cycle will reappear.

Cycle Start Date * 14/11/2013

The default date for your first cycle is 16/11/2009 corresponding to when the GMC issued licences to all doctors practising at that time. If you were issued a licence after this date please amend accordingly.

Estimated Next Revalidation Date * 31/03/2016

Please enter the date you anticipate to be revalidated to know as your Submission Date by the GMC.

RO Name Dr. NeilROSC1 Maciver

RO Email neil.maciver@equiniti360clinical.com

RO Recommendation

After you have received your revalidation from record here.

2 → Revalidated View guidance

Revalidation Completion Date *

After confirmation of revalidation has been received from the GMC, please enter the date here

Deferred View guidance

Requested Deferred Date *

The Requested Deferral Date must be greater than 60 days

Getting Started

Validate details

Complete your
portfolio

Self assessment

Appraisal and
sign-off

Completing Your Portfolio

Uploading previous paper appraisals

- 1 If you would like to upload a previous appraisal, not carried out on this system, you can do so by entering the appraisal history page **Appraisal > Appraisal History**, clicking **'Add New Record'** underneath **'Previous Appraisals'** and adding the required information
- 2 Once you have added the Appraisal details, select the newly created appraisal record from the list of previous appraisals
- 3 In the **'Appraisal Output Documents'** table select **'Add New Record'** and upload any previous appraisal documents you wish to include.

Appraisal History

Revalidation Cycle ⓘ
Estimated next Revalidation date: 31/03/2016

Please note that the start date for the revalidation cycle needs to precede your previous appraisals for them to be shown. [Click here](#) to manage your revalidation cycles

[Export](#)

Cycle Start Date	Revalidation Date	RO Name	RO Email
16/11/2009		Dr. Tom Beaumont	tom.beaumont@equiniti360clinical.com

Previous Appraisals ⓘ

[Add New Record](#) ⓘ

Appraisal Type	Appraisal Date	Appraiser Name	Appraiser Email	Designated Body	Whole Practice	Portfolio	Note ⓘ
RMS	21/10/2013	Adam Aintree CooperAPRAISER	adam.cooper@equiniti360clinical.com		Yes	View	View

Appraisal Output Documents ⓘ

[Add New Record](#) ⓘ

Document Type	View	Delete
Appraiser summary and sign off	View	Delete
Doctor summary and sign off	View	Delete
Profile, portfolio and reflective notes	View	Delete
Doctor's self assessment	View	Delete
Appraiser assessment of portfolio	View	Delete

Content

Steps for the Appraiser

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Content

Steps for the Appraiser

Key:



Take Caution – Situations that could impact the completion of appraisal



Note – Notes, usage tips or additional information

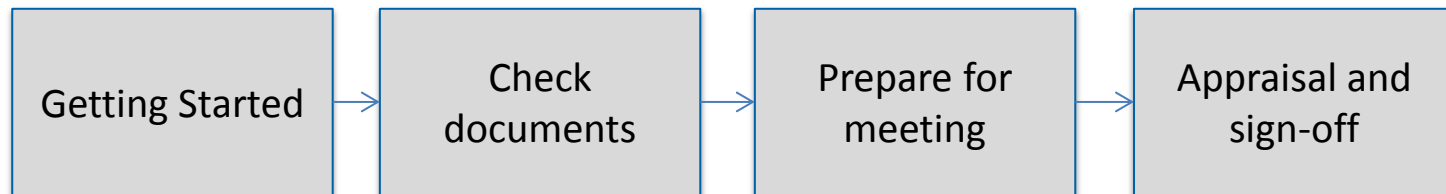


Refer to – The instruction number indicated

Steps for the Appraiser

4 key steps need to be carried out in order to complete the appraisal process

- 1 Get started - Activate your account and log on to the system
- 2 View the Appraisee's RMS account and ensure all the necessary documents have been submitted
- 3 Prepare for the appraisal meeting by reading all documentation
- 4 Carry out the appraisal meeting with your Appraisee and agree the outcomes of the appraisal

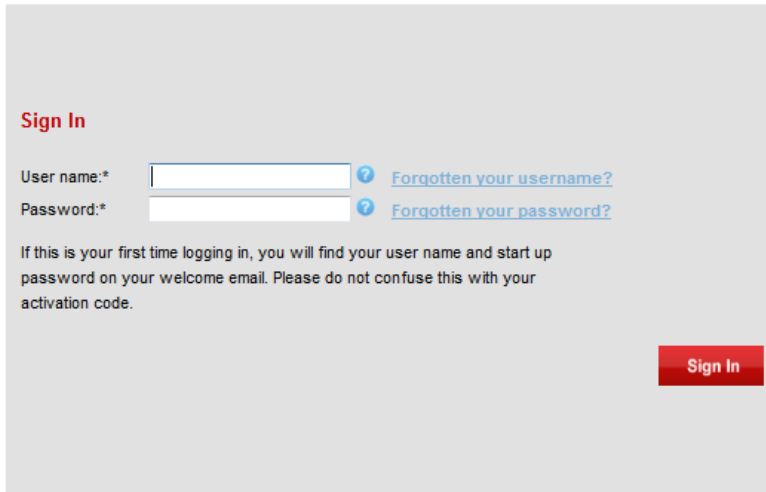


Getting Started

Activating your account

1

You will receive two welcome emails from lucy@equiniti-ics.com – One with a username and password and another with your activation code. Click on the link in your email which will open the **Sign In** page.



The screenshot shows a 'Sign In' form with the following elements:

- Sign In** (red text)
- User name:* [Forgotten your username?](#)
- Password:* [Forgotten your password?](#)
- Text: "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** (red button)



We suggest you copy and paste the complex password into the password field.

2

Once you have logged into the site you will be given the opportunity to change your password and select a security question.



Please do read the terms and conditions. There are some very important pieces of information within them – including, it is your responsibility to ensure no patient identifiable information is uploaded to the system.

Getting Started

Home Screen

- 1 Once you have logged into your account you will gain access to the RMS home screen. All information from your Trust, RST and GMC will be fed into the Announcement and News sections. The Appraiser will have a new tab called 'My Doctors'.

The screenshot displays the RMS Home Screen. At the top is a navigation bar with tabs: Home (active), Profile, Portfolio, My Progress, Appraisal, Revalidation, My Account, My Doctors, and Help. Below the navigation bar, a 'Welcome to your RMS' section contains three numbered instructions:

1. Complete the profile section and keep it up to date
2. Look at the portfolio section to see what key supporting information you are required to collect and upload it, adding your reflective notes where appropriate
3. Click the self-assessment button at the bottom of the appraisal page at least 2 weeks before your appraisal

To the right of the instructions is a black and white photograph of three healthcare professionals (two men and one woman) smiling and looking at a laptop screen.

Below the instructions and photo, the main content area is divided into three columns:

- Announcements:** A blue sidebar on the left showing '1 Announcements' with a 'Welcome to i16' message and a creation date of 'Fri, 18 Oct 2013 18:59'.
- Track your appraisal progress:** A green sidebar in the middle showing progress bars for three sections:
 - Profile: 100 % Complete
 - Portfolio: 11 % Complete
 - Appraisal: 100 % Complete
- News:** A grey sidebar on the right with a 'News' header and a placeholder for content.

Getting Started

Access your Appraisee's accounts

1 When you are ready to assess your doctor's portfolio click on the **My Doctors** tab. This will open a page listing all of the doctors linked to your account.

2 To view the Doctor's supporting information click the blue **View Appraisal** link. This will open a new window.

The screenshot shows a web application interface. At the top is a navigation bar with tabs: Home, Profile, Portfolio, My Progress, Appraisal, Revalidation, My Account, **My Doctors** (highlighted in red), and Help. Below the navigation bar is a section titled 'My Appraisees'. It contains a table with the following data:

Appraisee Name	Appraisee GMC Number	Appraisal Date	Appraisee Link
Dr Cooperexttest16DOCTOR, Adam	1111114	22/10/2013	View Appraisal

A callout box is positioned over the 'View Appraisal' link. The callout box has a title 'Appraisee Link' and contains the text 'View Appraisal' in blue. A blue arrow points from a blue square containing the number '2' to the 'View Appraisal' link in the table.

Check Documents

Access the Appraisee's supporting information

- 1 Agree with the statement that you are a revalidation ready appraiser trained
- 2 Double-click on the document icon against any of the documents you wish to view, or use the [View](#) link to see reflections.
- 3 Click the [View Reflective Notes Summary](#) button to review a summary of the doctor's reflective notes, by category.
- 4 If you are happy with the Appraisal to go ahead click on either **A** or **B**. If you have concerns, or wish for alterations to be made to the Portfolio, select **C** or **D** and leave a comment explaining your decision. Click the green **Submit** button once ready.

The screenshot shows the appraisal system interface. At the top, there are tabs for 'Appraisal Preparation', 'Self Assessment', 'Portfolio Assessment' (highlighted in red), 'Appraisal', 'PDP' (highlighted with a red box), 'Appraisal Summary', and 'Agreement Statement'. Below the tabs, a green bar contains a dropdown menu set to 'Yes' and the text 'Before you assess this portfolio, please indicate whether you have undergone revalidation ready appraiser training'. Below this, a blue box contains instructions: 'Please review your appraisees portfolio by selecting from mandatory documents below. The supporting information submitted by your appraisee will be shown in the right hand box below. Once you have reviewed all the information please select an answer from the blue Portfolio assessment box below, add a further comment if necessary then submit the questionnaire.'

The interface is divided into two main sections: 'Mandatory Documents' and 'Supporting Information'. The 'Mandatory Documents' section lists 'View Portfolio', 'View Self Assessment', 'View Scope of Work', and 'View Reflective Notes Summary' (highlighted with a red box and callout 3). The 'Supporting Information' section lists 'New Job spec', 'Audit info', 'Extra duties', and 'CPD', each with a 'View' link. Callout 2 points to the 'View' link for 'New Job spec'. Below these sections is the 'Portfolio Assessment' section, which contains four radio button options (A, B, C, D) for assessing the doctor's performance. Callout 4 points to option D. Below the assessment options is a 'Comments' section with the instruction '(If you click C or D you must leave a comment to explain why)'. At the bottom, there is a 'View Reflective Notes Summary' window. This window shows a list of categories (Personal, GMC, Organisation, Teaching, External work, College) and a 'Quality improvement activity (e.g. Audit)' section. Callout 3 points to the 'View Reflective Notes Summary' button in the 'Mandatory Documents' section. Callout 4 points to the 'Submit' button at the bottom right of the 'View Reflective Notes Summary' window.

Prepare for Meeting

Read through all the supporting information

1 Once you have confirmed you are happy for the appraisal to go ahead you can still access the Appraiser's supporting evidence by clicking **Portfolio > Portfolio**

2 You can then read through all the supporting documentation by double-clicking the document icon, or read any reflective notes by using the **view** link to the right.

The screenshot shows the GPM system interface. At the top is a navigation bar with links: Home, Profile, Portfolio, My Progress, Appraisal, My Account, My Doctors, and Help. The 'Portfolio' link is highlighted with a blue arrow and a circled '1'. Below the navigation bar is a sidebar titled 'Your Portfolio' with a search bar and a list of items: Portfolio Overview, View full portfolio, Supporting information, and Additional supporting information. Under 'Core Supporting Information', there are sections for 'Personal' (Self Declaration Health, Self Declaration Probity, Personal Development Plan) and 'GMC' (Continuing professional development, Quality Improvement Activity, Significant events, Feedback from colleagues, Feedback from patients, Review of complaints and compliments). A blue arrow points from the 'Portfolio' link in the navigation bar to the 'Portfolio' link in the sidebar. The main area displays a table titled 'Supporting Information' with columns: Title, Type, Status, Expires, and a 'View' link. The table lists various documents, including PDP 2011, 360 - Patient and colleague feedback, Complaint review 2012, Review of complaints, Trust Policy example 3.pdf, Trust Policy Example 5.pdf, 360 - Patient and colleague feedback output, CPS certificate, Significant events summary, Thank you letter, Probity Declaration, and Health Declaration. A blue arrow points from the 'View' link in the table to a circled '2'.

Title	Type	Status	Expires	View
PDP 2011	Personal Development Plan (PDP)	Published	23-01-2014	View
360 - Patient and colleague feedback	Feedback from patients (where applicable)	Published		View
Complaint review 2012	Review of complaints and compliments	Published		View
Review of complaints	Review of complaints and compliments	Published		View
Trust Policy example 3.pdf	Quality Improvement Activity (e.g. Audit)	Published		View
Trust Policy Example 5.pdf	Quality Improvement Activity (e.g. Audit)	Published		View
360 - Patient and colleague feedback output	Feedback from colleagues	Published		View
CPS certificate	Continuing professional development (CPD)	Published	07-02-2013	View
Significant events summary	Significant events	Published		View
Thank you letter	Review of complaints and compliments	Published		View
Probity Declaration	Self Declaration Probity	Published		View
Health Declaration	Self Declaration Health	Published		View

Appraisal and Sign-Off

Constructing the PDP and summary of appraisal discussion

- 1 When you click on the top **Appraisal** tab you will be asked to confirm the details of the appraisal – The date of Appraisal and Appraiser details
- 2 On the day of the Appraisal you can begin the Appraisal process by clicking the green **Start Appraisal** button.

Home Profile Portfolio **Appraisal** PDP

1

Start Appraisal

☒ Appraisal Preparation ☒ Self Assessment ☒ Portfolio Assessment ☒ **Appraisal** ☒ PDP ☒ Appraisal Summary ☒ Agreement Statement

The next step is to meet at the appraisal meeting.
On the day of the appraisal, please confirm the details below are correct, and click the Start Appraisal button to start the appraisal process.

Appraiser's details

Key appraiser's name Dr. Appraiser Fleetwood Key appraiser's email jess.fleetwood@equiniti360clinical.com

Appraiser's name

Appraiser's email

Appraiser's name

Appraiser's email

Appraisal details

Appraisal date * eg. 17/06/2011

Organisation within which the appraisal is taking place

Start Appraisal

2

Constructing the PDP and summary of appraisal discussion

- 

[Profile](#)
[Portfolio](#)
[Appraisal](#)
[Help](#)



Appraisal and Sign-Off cont....

Constructing the PDP and summary of appraisal discussion

3 Once you click the **Add PDP** link a window will appear allowing you to enter details regarding the development need. Enter the required information into the free text boxes. This will then populate the **PDP** document.

4 Once you click **Discussion** you can leave your notes and they will add to the discussion part of the PDP page

Add PDP Development Need

Page

Add PDP Development Need

Please fill out the information below to add a Development Need to the selected attribute.
By completing this form this information is automatically populated into your Personal Development Plan.
You will be able to change or delete development needs you add before your PDP is submitted.

The attribute you are adding a Development Need to is:
Develop and Maintain your professional performance

What development need do you have?

What would be the method best suited to you to develop in this area? Explore any resource limitations and plan around them

What measure could you use to establish if you have achieved this development

What is the date by which you will achieve this?

Cancel **Add to PDP**

*V2.16.2.0

Add Discussion Item

Page

Add Discussion Item

Please fill out the information below to add a Discussion Item to the selected attribute.
By completing this form this information is automatically populated into your Appraisal Summary of Discussion.
You will be able to change or delete discussion items you add before your PDP is submitted.

The attribute you are adding a Development Need to is:
Develop and Maintain your professional performance

Summary of discussion *

Cancel **Add to Discussion**

*V2.16.2.0

Appraisal and Sign-Off Cont.....

Confirm the PDP and summary of discussion

1 Once you have constructed the PDP and added any notes on the appraisal discussion, you can then confirm you are happy with the outcomes and submit the development plan by clicking the green **Confirm PDP** button. When you click confirm PDP, you will be unable to update or edit any documents.



There is a red **Concerns – Refer to RO** button throughout the system if you have any issues. This will stop the process and allow you to discuss any issues with your RO.

Personal Development Plan for:
Dr. Tim Cresswell

The development needs are shown below in your PDP. You now have an opportunity to edit/delete development needs and appraisal summary. When you are satisfied with your PDP and appraisal summary, please confirm acceptance by clicking the green button at the bottom of the page.

Development Needs	How will I address this?	Measure to determine if development has been met	Date	
Teaching doctors	Classroom sessions	Feedback sheets	20/11/2014	Edit/View Delete
Become a Role model	L		20/11/2014	Edit/View Delete

Message from webpage
By clicking Confirm PDP the doctor will be unable to alter their portfolio.

OK Cancel

Summary of Discussion		
Attribute	S	
Protect patients and colleagues from any risk posed by your health	No patient deaths this year. Well done	Edit/View Delete

Confirm PDP
by confirming the PDP we, the appraisee and appraiser/s understand that the PDP and Portfolio of supporting information will be locked down and available to the Responsible Officer.

Concerns - Refer to RO [Add Objective/Comment](#) **Confirm PDP**

Appraisal and Sign-Off Cont.....

Sign-off statements

1 To complete the Appraisal process complete the 2 declarations at the top in green.

2 Complete the 3 statements rating the Appraisee.

3 Enter comments in the free text box at the bottom of the page

4 Submit the Appraisal by clicking the green **Submit Appraisal** button.

The screenshot shows a web-based appraisal form. At the top, there are two green declaration boxes. Below these are three sections for rating the appraisee: '1. The doctor's fitness to practice', '2. The doctor's progress in collecting information for revalidation', and '3. The doctor's progress towards last year's PDP'. Each section has a table with radio buttons and text descriptions. Section 1 has three options: 'No information has been presented or discussed in the appraisal that raises concerns for patient safety', 'The doctor has provided sufficient information and this demonstrates good practice. There are no concerns for patient safety', 'The doctor has provided information that raises some concerns. Further investigation or action is required. There may be an issue that affects patient safety or quality of the information', and 'There is insufficient information for an assessment to be made'. Section 2 has two options: 'Appropriate supporting information has been presented in accordance with the requirements of the GMC's Good Medical Practice' and 'The doctor has provided sufficient information and the doctor is making progress towards their PDP'. Section 3 has two options: 'A review that demonstrates appropriate progress against last year's PDP' and 'The doctor has not engaged with or made progress with the previous year's development plan. Further action, support or investigation is required'. Below these sections is a '4. PDP Agreement' section with a dropdown menu. At the bottom, there is a '5. Summary of the appraisal discussion' section with a table of attributes and a '6. Comments' section with a text box. At the very bottom, there are two buttons: 'Save changes and submit later' and 'Submit Appraisal'.

1. The doctor's fitness to practice

2. The doctor's progress in collecting information for revalidation

3. The doctor's progress towards last year's PDP

4. PDP Agreement

5. Summary of the appraisal discussion

6. Comments

Concerns - Refer to RO

Save changes and submit later

Submit Appraisal

Common Questions

Let us help you resolve any issues



I can't access my Appraisee's information.
When I click View Appraisal nothing happens.

This may be because you have blocked pop ups on your internet browser – If this is the case, once you allow pop ups you will be able to access your Appraisee's account with ease.



I've forgotten my password – What now?

On the login page there will be a **forgot password** link. Please follow the instructions. Please note if you enter the incorrect password 3 times in a row, it will lock you out of the system.



I can't find my Appraiser

Firstly, please ensure you click on the address book and search for your Appraiser, rather than type your Appraiser's name into the free text box.

When the popup window appears only fill in one search field (perhaps the surname only) rather than fill in every search field.

If you are still unable to locate your Appraiser give us a call and we will check if their details have been added to the system

Common Questions

Let us help you resolve any issues

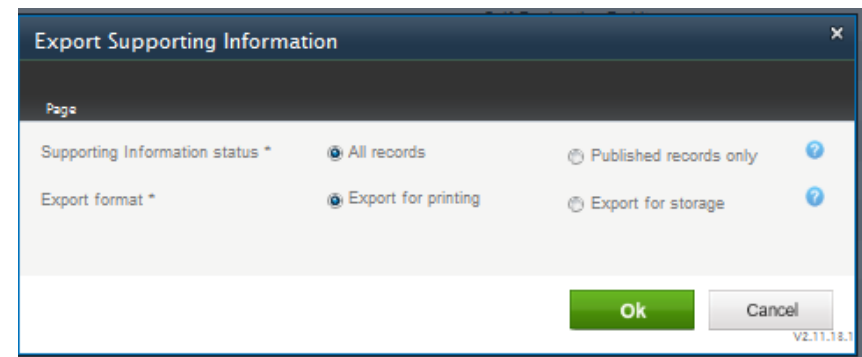
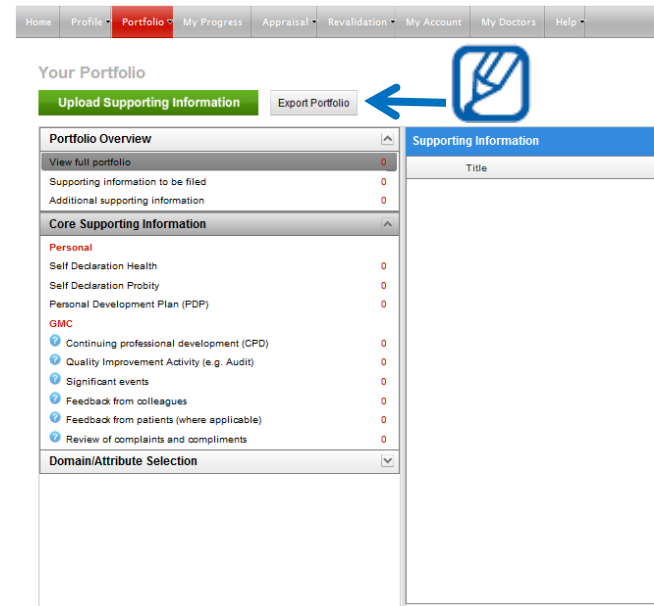


I've moved Trusts and my new Trust is using a different piece of software for appraisals and revalidation. Will I have to upload all my supporting information again into the new system?

Yes - you will have to re-upload all your information into the system used at your new Trust. However, we have tried to make this transition easier for you by including an **Export Portfolio** button which can be located in your Portfolio screen.

When you click on the Export Portfolio button a pop up screen will appear allowing you to select which files you would like to export.

You may also wish to export your portfolio for personal back-up reasons also.



Common Questions

Let us help you resolve any issues



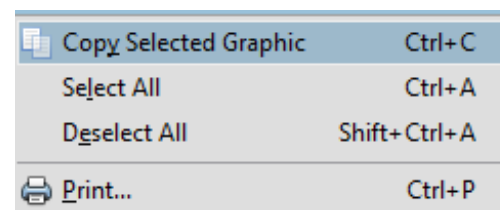
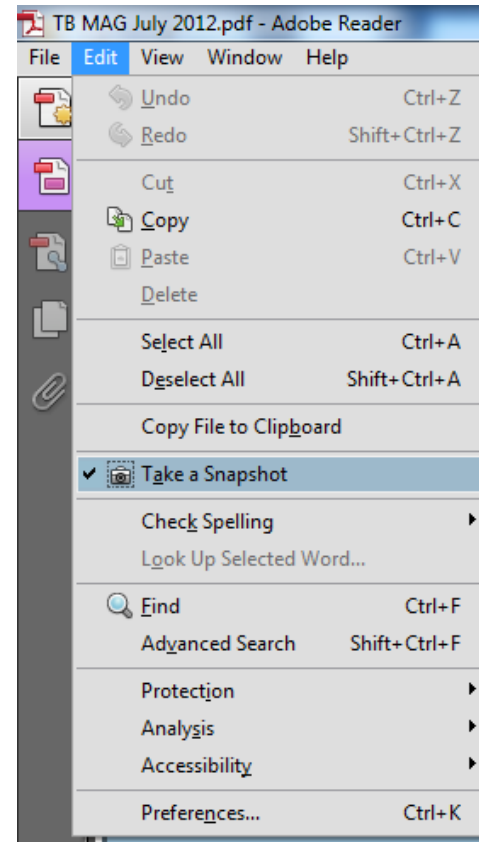
My scanner has produced a large PDF document with all my scanned supporting information. How can I split this PDF document into different parts so I can upload my different supporting information separately?

You can split a pdf document by clicking on **Edit > Take a Snapshot**. This will then allow you to select the area you wish to separate from the document.

After selecting the area, you can then right click and select **Copy Selected Graphic**.

Open up Microsoft Paint and paste the selected area. Then click on **File > Save** and save the selected area as a separate file.

Please note this method can also be used to split MAG forms



Common Questions

Let us help you resolve any issues



It's taking a particularly long time to upload documents, is there anything I can do to reduce this upload time?

Like all other software, the larger the file, the longer it will take to upload the document. A useful trick is to save the large document as a smaller file type using the method described below. We recommend that you try to upload files smaller than 1MB and no bigger than 10MB

Click on **File > Save As** this will cause a pop up window to appear. Choose an appropriate **File name**. In the **Save as type** field choose from the drop down menu 'smaller' file type.

Example of small file types

pdf

.doc and docx

.jpg

Example of large file types

PNG

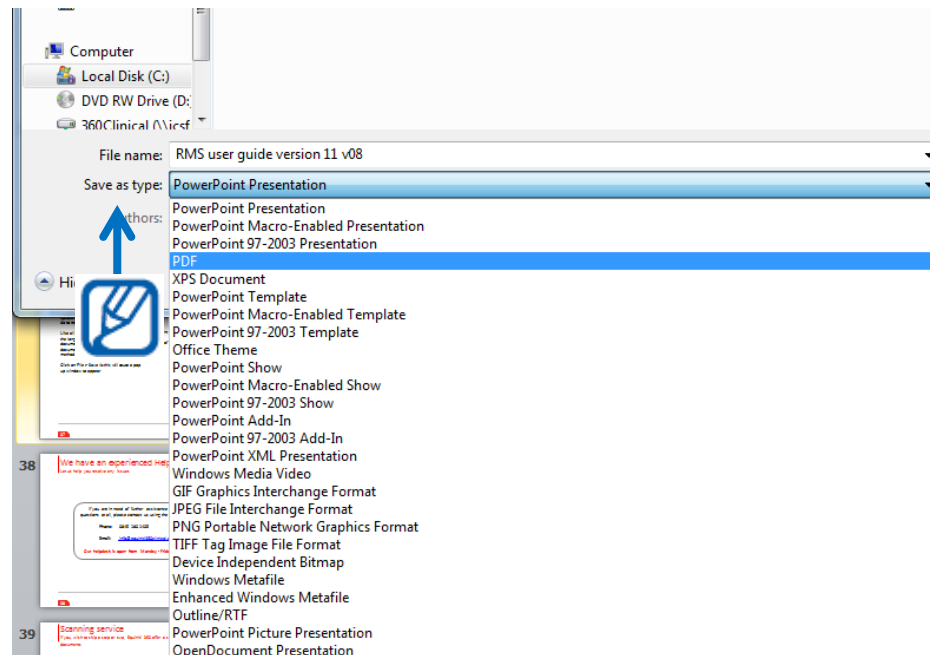
BMP

TIF

GIF

.ppt and .pptx (Powerpoint presentations)

We suggest you re-save scanned documents to a pdf format



Common Questions

Let us help you resolve any issues



I've forgotten to include a PDP in the appraisal and have now completed the appraisal process. Is there any way this can be rectified?

Unfortunately once you have submitted your appraisal you have effectively locked down your outputs from the meeting.

However you can write up your PDP in a word documents and store it with your previous appraisal outputs on the system.

Click the **Appraisal tab** at the top of the page and **Appraisal History** underneath it. Under the table entitled 'Appraisal Output Documents', click on **Add New Record**.

A pop up window will then appear allowing you to attach a file.



Appraisal History

Revalidation Cycle ⓘ
Estimated next Revalidation date: 31/03/2016

Export

Cycle Start Date	Revalidation Date	RO Name
01/01/2000		Mr. John Smith

Previous Appraisals ⓘ

Add New Record | **Export**

Appraisal Type	Appraisal Date	Appraiser Name
Other	02/01/2013	A

Appraisal Output Documents ⓘ

Add New Record

Document Type
No records to display.

Add Appraisal Document

Document Type *

Appraisal Document *

V2.14.1.3

Common Questions

Let us help you resolve any issues



I've completed my appraisal successfully but I can no longer see my supporting information in my portfolio. Why is this?

Please be reassured that no information is lost. After an appraisal is completed the system archives any Supporting Information that is no longer valid for your next appraisal. This is governed by the expiry date/retention period given to each piece of supporting information. The system will put a default retention period of after your next appraisal.

If you wish to retrieve an archived piece of information, please use the search tools and resave (renaming the document) back into your portfolio. Click on the **Portfolio** tab at the top of the screen, **Search Supporting Information** and then enter your search criteria in the field provided.

Alternatively go to **Appraisal > Appraisal History** and the **View Portfolio** link where a snapshot of your portfolio at the time of your appraisal exists for those appraisals which took place after 5th of December 2012.

Searching Supporting information

Common Questions

Let us help you resolve any issues



I am an Appraiser and I cannot view my Appraisee's information. Why is this?

This may be because your Appraisee has not changed their information from draft to published. In which case you can send the Portfolio back by clicking option D within the Portfolio Assessment page '*The doctor has provided inadequate or insufficient or too much supporting information for an assessment to be made.*' and asking the Appraisee to Publish all their documents before re-sending their portfolio.

It may also be that you are selecting to view the reflective notes rather than clicking on the icon to view the document. You must click on the document icon if you wish to open the file. The view link will open the reflective notes (Please see page 28 for details).

Sending Supporting Information back to the Appraisee

Appraisal Preparation

Self Assessment

Portfolio Assessment

Appraisal

PDP

Appraisal Summary

Agreement Statement

Select

Before you assess this portfolio, please indicate whether you have undergone revalidation ready appraiser training

Please review your appraisee's portfolio by selecting from mandatory documents below.
The supporting information submitted by your appraisee will be shown in the right hand box below.
Once you have reviewed all the information please select an answer from the blue Portfolio assessment box below, add a further comment if necessary then submit the questionnaire.

Mandatory Documents

[View Portfolio](#)
[View Self Assessment](#)
[View Scope of Work](#)

Personal

Self Declaration Health1

Self Declaration Probity1

Personal Development Plan (current & new draft)0

GMC

Continuing professional development (CPD)0

Quality Improvement Activity (e.g. Audit)0

Significant events1

Feedback from colleagues0

Feedback from patients (where applicable)0

Review of complaints and compliments0

Supporting Information

Title	Reflective Notes
Probity Declaration	View
Health Declaration	View
Personal development	View

Portfolio Assessment

☐ A

The doctor had provided adequate supporting information. Assessment of this information is sufficient to demonstrate good practice.

☐ B

The doctor has provided adequate supporting information. Further development is needed to adequately demonstrate performance, but there are no significant concerns for patient safety or quality of care.

☐ C

The doctor has provided adequate supporting information. Assessment of this information demonstrates a significant concern for patient safety or quality of care which requires immediate referral for further investigation and management.

☐ D

The doctor has provided inadequate or insufficient, or too much supporting information for an assessment to be made.

Comments (If you click C or D you must leave a comment to explain why)

We have an experienced Helpdesk

Let us help you resolve any issues

If you are in need of further assistance or have any questions, please contact us using the below methods:

Phone: 0845 180 1405

Email: info@equiniti360clinical.com

Our helpdesk is open from Monday - Friday, 8am - 8pm