Conducting an Appraisal – Manager in Learn+

Northern Devon Healthcare NHS Trust
Royal Devon and Exeter NHS Foundation Trust

Quick Reference Guide

In this Quick Reference Guide

Follow these step by step instructions on how to access and complete a team member's appraisal including, for those with two posts, sharing it with their second Line Manager.

The Appraisal is a three part process:

1. Team member (Appraisee) creates the appraisal, answers the questions, and submits it to the line manager (Appraiser) for review.
2. A date is set for the Appraisal conversation. Following the appraisal the manager writes up their comments, feedback, and updates or amends the agreed objectives and sends it back to the team member for final review. Where the team member has more than one line manager, the appraisal can be forwarded to a 2nd line manager for their comments before sending it back to the team member.
3. Team member adds their own comments and completes the final sign off.

1. Navigate to the Appraisal

1. Click the **My Appraisal** tile on the home page or click My Appraisal from the menu bar
2. Click the Click here for My Appraisal - Manager Overview tab
3. Filter the results by either: Choose... / Choose... / Hide Previous Appraisals
   - Select 'Hide Previous Appraisals' from the View a **Saved** **Search** drop down

   OR
   - Set the **Users Workflow Status** to: is equal to / Incomplete and click Search
4. Click Manager from the **View As...** column on the relevant team member
5. Click Start
6. Navigate through the appraisal reviewing your team member's answers and complete all relevant fields on the Manager Summary tab as appropriate.
   Note: you can also add objectives/goals
7. Once completed click Next to send the appraisal back to the team member for their final comments.

Question Types

Date	Click the icon and select a date from the calendar
Free Text	Click in the box and type to enter your answer (Your answer)
Radio Buttons	Click the radio button next to the answer that you would like to select. (Your answer: Partially Meets / Meets / Exceeds)
Drop Down Box	Click the drop down box and select the relevant answer from the list. (Grey - New to role / Green - Chance to grow / Orange - Chance to shine)

Navigation

The navigation buttons can be found at the bottom of each appraisal form page.

Next	Click this to move to the next page in the appraisal. **Note:** Clicking Next on the final page will either send the appraisal to the team member or to their second manager if you have selected one.
Save and Exit	Click this to save your progress and exit the appraisal.
Save as Draft	Click this to save the appraisal as a draft to come back to later.

Alternatively you can navigate to any page in the appraisal using the navigation menu on the left. Click on any of the sections to go to that page.

- WELCOME
- YOUR HEALTH & WELLBEING
- REVIEW OF THE PAST 12-MONTHS
- FUTURE OBJECTIVES & GOALS
- ASPIRATIONS & POTENTIAL
- DEVELOPMENT GOALS
- SELF DECLARATION

Expanding Fields

Some fields are hidden and need to be opened to be viewed, if there is purple text such as: Your Role click on the subtitle to open the section. This is primarily located on the Review of the Last 12-Months page

Conducting an Appraisal – Manager in Learn+

Quick Reference Guide

More than one Line Manager?
If the Team Member has more than one line manager select 'Yes' and click **Select User,** search for the user, click on the correct person and click **Save**, repeat this process until all managers are added.
If someone is added incorrectly click the **X** next to their name to remove them.

Does this Team Member have another role with a 2nd manager?

Your answer*

- Yes
- No

Name of 2nd Manager (if selected Yes above)

Select user

Once the appraisal has been submitted by the first manager an email will be sent to the second manager with a link to access the appraisal.

Download a PDF
You are able to download a copy of the appraisal at any point, click Download PDF located at the top of the appraisal page.

2. Accessing the Appraisal as a Second Manger

If you are a second manager, you will receive an email to notify you to review the appraisal once the appraisal has been reviewed by the first manager.

1. Click the **My Appraisal** tile on the home page or click My Appraisal from the menu bar
2. Click the Click here for My Appraisal - Manager Overview tab
3. Filter the results by either: Choose... (Choose... / Hide Previous Appraisals)
   - Select 'Hide Previous Appraisals' from the View a **Saved Search** drop down

   OR

   - Set the **Users Workflow Status** to: is equal to / Incomplete and click Search
4. Click 2nd Manager from the **View As…** column on the relevant team member
5. Click Start
6. Navigate through the appraisal reviewing your team member's answers and complete the 2nd Manager Summary on the Manager Summary tab. You can also add objective/goals.
7. Once completed click Next to send the appraisal back to the team member for their final comments.

3. Completion

Once the team member has added their final comments, the appraisal process is complete, open the appraisal to view the comments.