

In this Quick Reference Guide

Follow these step by step instructions on how to access and complete your appraisal form including adding comments and reviewing once completed

Selecting your Line Manager/Appraiser in Learn+



If you have not already selected your manager in Learn+ follow section 3 of the 'Log in, Navigate and Find Learning' Guide **OR** to just select your appraiser follow the Choose New Appraiser Learner Guide. Both are available on Learn+ under the FAQs tab or via BOB.

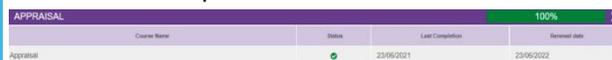
The Appraisal is a three part process:

1. The Appraisee creates the appraisal, answers the questions, and submits it to the Appraiser for review.
2. A date for the appraisal conversation is set. The appraiser writes up their comments, feedback, and can adjust or add agreed objectives and either sends it back to the appraisee for review or sends it onto their 2nd manager if applicable, who reviews it and adds their comments, then sends it back to the appraisee.
3. The appraisee adds their own comments and completes the final sign off.

Checking your appraisal compliance



Click [My Dashboard](#) your appraisal compliance will then be shown with all of your other compliance data, including the last completion date and renewal date.



1. Accessing your Appraisal

1. Click the **My Appraisal** tile on the home page or click [My Appraisal](#) from the menu bar
2. Click [Click here for My Appraisal - Appraisee](#)
3. Select the relevant box:
Are you in a leadership role?

Your answer* Yes No
4. Click [Next](#) to save and go to the next page

Download a PDF



You are able to download a copy of your appraisal at any point, click [Download PDF](#) located at the top of the appraisal page.

Question Types

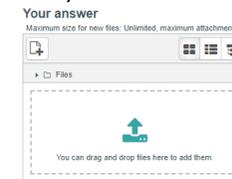
Slider Click on the bar to move the slider to select your answer.



Free Text Click in the box and type to enter your answer.

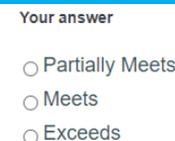


File Upload Click the plus button at the top of the box and click **Choose File**, search for the file and click [Upload this file](#).

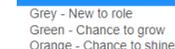


Alternatively, you can drag and drop the file.

Radio Buttons Click the radio button next to the answer that you would like to select.



Drop Down Box Click the drop down box and select the relevant answer from the list.



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

2. Adding an Objective

This refers to your Future Objectives & Goals to be discussed with your Appraiser.

1. Click **Add objective / goal**
2. Type your objective into the What needs to be achieved text box
3. Click , select a target date for completion
4. Complete the text boxes as appropriate
5. Click **Save**

Repeat this process to add additional objectives

3. Adding a Development Goal

This refers to the Development Goals section of the appraisal form.

1. Click **Add a development goal**
2. Select the development category
 - Clinical
 - Non-Clinical
 - Leadership and Management
3. Type into the What needs to be achieved text box
4. Click , select a target date for completion
5. Complete the text boxes as appropriate
6. Click **Save**

Repeat this process to add additional goals

To remove an **objective** or **development goal** click **Remove** and **Yes** to confirm

Navigation

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

Save as Draft Click this to save your appraisal as a draft and stay on the page.

Next Click this to save and move to the next page in the appraisal.

Save and Exit Click this to save your progress and exit the appraisal.

Submit to Manager Click this to submit your appraisal to your appraiser; they will receive an email notification.

Note: this only appears on the final page of the appraisal.

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

4. Add Comments and Sign off

1. Click the **My Appraisal** tile on the home page or click **My Appraisal** from the menu bar
2. Click **Click here for My Appraisal - Appraisee**

3. Click **My Appraisal** on the relevant appraisal
4. Use the navigation buttons to navigate through the appraisal, reading comments added by your Appraiser or second manager
5. Enter your final comments into the final comments free text field
6. Click **Save as a Record**

Confirmation x

Are you sure you wish to submit your appraisal? Once you have pressed Save as a Record, no further changes can be made.

Yes **Cancel**

You have now submitted your appraisal and it can no longer be edited, your appraiser will receive an email to inform them that the appraisal has been completed.



More than one Line Manager?

If you have more than one line manager when you complete the feedback for your appraiser in the self-declaration tab please clearly state who you are referring to. Please also note that both the appraiser and manager will be able to see all of the appraisal and comments.