



Product Information



System Overview

Clarity Appraisals for Doctors is a web-based application designed to securely guide appraisees and appraisers through the appraisal and revalidation processes.

User roles exist for Appraisees, Appraisers, Responsible Officers and Administrators. There is also an Assessor role for quality assurance and a Lead Appraiser role for Appraiser performance reviews. Each user role has a dashboard summarising key data.

Appraisees can manage their own historical appraisals and ensure the required historical information is accounted for in a revalidation cycle.

Key information is presented to administrator users on a single dashboard. This dashboard consists of graphical widgets which can be accessed to drill down into data to identify all required detail. Potential issues are highlighted ahead of time to ensure action can be taken to prevent late or overdue appraisals.

The appraisal process can be customised across the following areas: control over dates for evidence collection, how appraisal dates are automatically spread over the year, allocation of appraisers, limits to how many appraisals an appraiser can perform and a number of options delegation additional control to the appraisees.

There is a 360/Multi Source Feedback (MSF) tool with benchmarking which is embedded in the system.

The appraisal screens ensure all information can be recorded to cover the doctors' full scope of practice and all events and activities performed. Each event can be reflected upon and files can be uploaded without restriction to number, size or file type.

Over 300,000 appraisals have been completed within the toolkit and the embedded 360/Multi Source Feedback solution has been used to collect over 1.3 million responses as a benchmark against which results can be analysed.

1. Appraisee functionality overview

Online portfolio: Document your continuous career learning effectively, upload portfolio information easily into your appraisal.

Appraisal platform: Submit documentation directly into the appraisal, check your appraisal progress and reflect upon your practice as part of the revalidation process.

Integrated Multi-Source Feedback: Gather feedback from your patients and colleagues through paper and electronic questionnaires, reflect upon and self assess your practice and compare your results against a range of averages.

Mobile app (AMP): A companion app for Clarity Appraisals - AMP allows you to record your CPD evidence and reflection on the go, securely stored on your mobile device. Once created you can sync to your Clarity Appraisals account and import into your portfolio/appraisal.

AMP synchronises across iOS and Android devices.

Other tools include:

Track your appraisal progress and revalidation progress.

View up-to-date guidance notes collated from the most recent GMC and AOMRC documentation.

Book meetings with your Appraiser within Clarity Appraisals.

View shared notes your Appraiser has added to your appraisal or individual items.

Print and download your appraisal or sections within your appraisal.

View the number of CPD points you have accrued in real-time.

Compare your Multi-Source Feedback results against the national, organisational and speciality averages.

Further support available online via our online user guides and video tutorials or through bespoke training sessions arranged by your organisation.

2. Appraiser Feature overview

Appraiser dashboard: Collates all information in one place, providing an easy workflow and sign off page.

Appraiser notes: Add notes to sections of an appraisal, keep them private or add shared notes available for your Appraisee to see.

Appraisal meetings: Create a range of meeting slots available to all Appraisees or specific Appraisees. You can also edit or delete them, send reminders and be reminded of any upcoming meetings.

Other features include:

- Compare your Appraisee's MSF results against the national, organisational and speciality averages.
- Access submitted appraisals instantly.
- Easy to revert appraisal back to your Appraisee after sign off.
- Ability to edit PDP and CPD sections to help guide your Appraisees through their appraisal.
- Easy to find all booked appraisal meetings by looking at your homepage calendar.
- Print and download Clinician's appraisals or sections within the appraisal.

3. Appraisal Management Overview

Revalidation progress: View your organisation, upcoming revalidation dates and individual Clinician's progress through the Revalidation Progress overview screen.

User management: Variety of tools available to manage your users including batch creation and allocation.

MSF Benchmarking: View results of an individual doctor, speciality averages, your organisational average or national average. MSF Benchmarking allows you to monitor low performance and view results in an easy-to-read, graphical format.

Other features include:

- Full control and management of the appraisal process and organisational settings.
- Ability to monitor Clinicians' progress, allocate due dates of appraisals, monitor appraisal appointments.
- Easy to view organisation statistics and information.
- Variety of management reports with statistical filters.

- ORSA compliant reporting for appraisals and clinical governance.
- Easy to manage workflow through the Appraisal Administrator and Responsible Officer dashboards.
- Arrange training for any roles within Appraisal Toolkit from our experienced trainer, to ensure all are comfortable using our system.

4. Supporting the Responsible Officer

The Clarity Toolkit Responsible Officer role provides both the organisational overview of the appraisal and revalidation process and easy access to the detail required to provide revalidation recommendations.

The **appraisal dashboard** presents the key performance indicators for the appraisal year as defined by the trust. Each element supports 'drill-down' functionality to present the relevant appraisals and appraisees. The graphical widgets summarise the overall appraisal status at the trust and highlight upcoming, recently completed and overdue appraisals.

The **revalidation dashboard** displays key indicators to assist in managing revalidation. Revalidation cycles due to be completed within the current appraisal year are presented by quarter, highlighting appraisees who have yet to '*create their cycle*', not '*attached completed feedback*' and those who are '*overdue*'.

Calendar representations of appraisals and revalidation recommendations due are also available. These present a summary of the appraisee, appraisal and revalidation information. All information supports drill-down to access any detail required.

These dashboards and calendars are also available to the appraisal administrators who will be managing the process with further widgets appropriate to their role.

Reports (including everything required to complete the NHS England quarterly and annual reports) are available to the appraisal administrators and the responsible officer. The '*development needs*' report is generated from the areas selected from appraisees PDPs. Reporting is also available on educational appraisals and feedback provided against the appraisers.

Additional reports or dashboard widgets can be easily added on request.

Access to completed feedback reports against a robust benchmark of 854,268 patient and 544,375 colleague questionnaires completed is available for every completed feedback cycle.

5. Management Information

The management information provided within our system is as follows:

The system provides a 'Leaver's and 'Arrivals' report which is configurable using filters for date range and role. The system also offers a number of graphical widgets allowing administrators to drill down to lists of current users at all levels including appraisees.

Widgets are provided within our system which enable administrators to access a breakdown of revalidation cycles 'without a meeting date', 'due this year' and 'overdue'. Widgets are also provided to present the appraisals and their status to identify appraisals which may have missing information.

Appraisal listings are presented with all the required data and can be filtered by year, status, overdue or late. The resulting data can be sorted as required. Revalidation cycle listings can be filtered by 'due date this year', 'due date after this year', 'overdue' and 'no date set'.

Incomplete appraisals beyond, or approaching, their due dates are highlighted to the administrator level users in timescales of 'overdue', 'due date in 14 days or less', 'due date in 15-28 days'.

Our system offers an Appraisals by Appraiser report which can be configured using filters for date range and named appraiser. We provide both a summary and detailed version of the report.

Information is provided in summary using graphical widgets on the Appraisal and Revalidation dashboards. The dashboard is fully configurable to allow the data to be presented in the order and grouping that makes best sense to the user, dependent on their priorities and responsibilities.

The system also allows administrators to add and remove users from the organisation. System identity names are automatically allocated (email address) and initial passwords are created by the user within the limits set for creating strong passwords on registration.

The available formats are: PDF, excel and CSV files.

6. Reporting

Our system is designed to provide comprehensive, accurate and real-world reports and outputs for end users and system administrators.

Data can be viewed and exported from all administrator and responsible officer reports in a PDF format. All filterable administrator tables and grids throughout the system can be exported into XLS and CSV.

All user roles with access to our appraisal system have the ability to view and download set or customisable configurations of individual appraisals. Default configurations are presented on the download appraisal screens. The output of the appraisal downloads comes in PDF format.

All user roles also have access to an overview of uploaded documents relating to each appraisal. Uploaded documents can be downloaded in the same format as uploaded.

All user roles with access to an appraisal have the ability to view and download set or customisable configurations of individual appraisals. The current set configurations are

‘Complete’- All information contained within the four appraisal forms.

‘Summary’- All information within the appraisal, excluding supporting evidence from form 3.

‘PDP’- PDP, Role, Significant Event, Additional Areas of Discussion information and the three sections of form 4.

Our system enables an administrator to identify the number of users who have registered with the toolkit and identify the number of user accounts with access to the system by role (Appraisee, Appraiser and Administrator).

An administrator can search for a user within the system by the following criteria: Surname, forename, GMC number and email address.

Our system provides various audit tools, enabling administrators to access: Open, in-full, current appraisals at the completed stage.

The Administrator also has access to completed historical appraisals.

The Administrator can search and filter appraisals by following criteria:

- Appraiser/Appraisee Surname
- Appraiser/Appraisee Forename
- Appraiser/Appraisee GMC number
- Date Month/Year
- Status (for example In-progress, Submitted, Completed)

7. System ease of use

Our highly skilled development and delivery team have over 16 years' experience designing, programming, maintaining and hosting appraisal solutions.

Our development is focussed on our delivery criteria; specifically, that our system functions 'quickly' in real-world user environments. Our testing, analytics and feedback confirm that our system functions very quickly on all supported browsers and operating systems with an uninterrupted internet connection.

For all user roles, our toolkit is designed to be 'easy' and 'intuitive'. Developed by clinicians, the objective of the toolkit is to ensure that all aspects of the GMC's requirements for appraisals and revalidation can be met without it being time consuming or complicated. With over 16 years of experience in medical appraisal solutions, our developers understand that making appraisal and revalidation process as simple as possible is the highest priority.

We have also released a mobile 'app' in order that clinicians can collect CDP evidence 'on the go'.

This new functionality further enhances the ease of use for documenting and reflecting on the input of supporting information for appraisal and revalidation.

Users are able to create, view and upload supporting information online in our system.

Our system provides text prompts and guidance throughout. In addition, a traffic light system is in place to ensure all mandated information is collected and completed.

After submission of the appraisal is attempted any shortfalls in the required information are identified and presented to the appraiser as a list of warnings on a screen designed to offer advice, highlight errors and emphasise recommendations. Each warning also operates as a link directly to the relevant section where additional information is required so the appraiser does not need to manually click through to the relevant section.

Warnings are presented with a colour code.

- Green confirms all information has been entered and the section is complete.
- Blue and yellow warnings highlight potentially incomplete sections that would not prevent the submission.

For example, if no quality improvement activities have been recorded, no feedback has been included or if events have been recorded without reflection. Red warnings

must be resolved before the submission can be actioned. These include mandated statements and declarations are incomplete or no PDP has been entered.

Until the required data has been entered the appraisal cannot be submitted to the appraiser.

The same process is in place to ensure that all required actions have been completed when the appraiser signs off an appraisal. Warnings are presented to ensure the last years PDP, proposed PDP, appraisal summary and statements and declarations have been completed. Until these sections are complete the appraiser cannot sign off the appraisal.

8. System Availability

Clarity's system is available 24 hours a day, 365 days a year, other than for scheduled maintenance downtime. Most maintenance and upgrades happen without any disruption to our service provision. System availability is 99.5%, measured monthly

9. Information Assurance

Clarity is compliant with the Data Security and Protection Toolkit and ISO 27001:2013 accredited. Compliance is audited annually by an independent UKAS accredited auditor. The highest standards of confidentiality and security denoted by these accreditations apply fully to all systems and processes. This includes data transmission, temporary data storage, processing, and reporting and access control.

Each user wishing to transmit, receive or view data will be supplied with a unique IP address in a secure connection protocol for data transmission and for viewing data.

Access to the Clarity Appraisals for Doctors for all roles is protected by personal password authentication. We operate a sliding scale timeout requiring the re-entering of credentials if a session is left for one hour or longer.

At the time of registration with our Appraisal Toolkit a security question/answer pair is collected, which is utilised for identification purposes by our customer service team. This ensures any requests received on the helpdesk are made only by the authorised person.

Warnings are presented to our customer service team to ensure that each organisation can define which changes to the appraisal process can be requested by an appraisee.

Any requests for additional data are handled by the information asset owner working closely with Agilio's Chief Information Security Officer and Caldicott Guardian following the framework as defined by the current Data Protection Act. Our appraisal and revalidation software and service is also fully compliant with GDPR requirements.

10. Security, Hosting and Access Requirements

The Appraisal platform is an online portal. User access is role based for each acute trust.

Our system can be accessed using the following browsers.

- Microsoft Internet Explorer 11+
- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- iOS Safari
- Opera

11. User Support Team

Clarity provides a dedicated in-house User Support Team, providing support during Monday - Friday, and during the hours of 09:00-17:00.

Clarity provides additional support by providing high quality user training guides, FAQs and a wiki. This can be accessed from a link in every screen within our Appraisal Toolkit.

We commit to respond to all queries on the same working day. Typically, all queries are responded to within 60 minutes.

This support will be provided throughout the duration of the contract.