

RMS Worksheet – Appraisal Summary

Upload Appraisal Summary:

1. Download and save a copy of the Appraisal Summary from the Appraisal Toolkit being used.
2. Login to the RMS System.
3. Click on the 'Acting as an Appraiser' Tab.
4. Search for the Appraisee whose record you want to update.
5. Click on the 'View' button. This will take you to the Appraisee's electronic record.

NB: Before uploading a document check that you are in the correct Appraisal year. Use the arrows at the top of the record to navigate between appraisal years.

6. Click on the 'Upload Document' button at the bottom left hand side of the screen.
7. Click on the 'Browse' button and select the file you would like to upload.
8. Enter a description of the document. See [Appendix 1](#) for File Naming Convention.
9. Click the 'Upload' button.
10. Delete the Appraisal Summary from your computer. You may wish to refer to further guidance on information governance.

Enter Details of the Appraisal Summary:

11. Click on 'Appraisal Details' and make a note of the Appraisal Date. You may need to include this date in the Appraisal Output Summary.
12. Then return to the main appraisal page and click on the 'Appraisal Output Summary' shortcut.
13. Complete the record using the drop-down menus. See [Appendix 2](#) for example Appraisal Output Summary.
14. Click on the 'Save' button at the bottom of the webpage.

NB: It will not be possible to save the record until all 'required' entry fields have been completed. Please also be aware that this web page may time out without warning and without saving your comments.

NB: You will not be able to alter this record once it has been saved. Please ensure the Appraisal Output Summary record is complete and accurate before saving.

Review Revalidation Summary:

15. Click on the 'Acting as an Appraiser' Tab.
16. Search for the Appraisee whose record you have just updated.
17. Click on the 'Revalidation' button. This will take you to the Appraisee's Revalidation Summary.

NB: Please refer to [Appendix 3](#) for details about Revalidation Summary RAG rating.

NHS England

Bath, Gloucester, Swindon and Wiltshire (BGSW) Area Team

Medical Directorate – Appraisal & Revalidation Team

Author: Natalie Booth, Project Officer

Date: 30/10/2014

RMS Worksheet – Appraisal Summary

Appendix 1 – File Naming Convention in RMS

[Enter Document Date]_[Enter Document Description]_[Enter Appraiser Name]_[Enter Appraiser GMC Ref]

For Example: 2014-10-31_Appraisal Summary_Dr J Doe_1234567

NB: If possible the document date should be the date the document was signed / agreed.

Appendix 2 – Example Appraisal Output Summary

Section	Select	Comments
Quality Improvement Activity (QIA)	Yes / No	List verified activity (e.g. 1 x Audit).
Sufficient Continuing Professional Development (CPD)	Yes / No	
Number of CPD Credits	Whole Number	Enter the total number of credits earned by the Appraiser. Entry must be a whole number.
Significant Events	Yes / No	
Complaints & Compliments Review	Yes / No	
Colleague Feedback (MSF)	Yes / No	Only needs to be completed once in a revalidation period. Enter No if not completed. Enter Yes if completed and confirm date completed.
Patient Feedback (PSQ)	Yes / No	
Scope of Work	Yes / No / No Other Roles	If applicable enter comment about 'Other Roles'.
Probity Declaration Confirmed	Yes / No	
Health Declaration Confirmed	Yes / No	
MAG 1	Agree / Disagree	
MAG 2	Agree / Disagree	
MAG 3	Agree / Disagree	
MAG 4	Agree / Disagree	
MAG 5	Agree / Disagree	

NB: It will not be possible to save the record until all 'required' entry fields have been completed. Please also be aware that this web page may time out without warning and without saving your comments.

NB: You will not be able to alter this record once it has been saved. Please ensure the Appraisal Output Summary record is complete and accurate before saving.

NHS England

Bath, Gloucester, Swindon and Wiltshire (BGSW) Area Team

Medical Directorate – Appraisal & Revalidation Team

Author: Natalie Booth, Project Officer

Date: 30/10/2014

RMS Worksheet – Appraisal Summary

Appendix 3 – Revalidation Summary RAG rating / scoring

Appraisal / Revalidation Section	RAG rating / Scoring
Quality Improvement Activity (QIA)	Green if any individual year is green. Red otherwise.
Continuing Professional Development (CPD)	Green if all years are green. Red if all years are red. Amber otherwise.
Significant Events	Red if any year is red. Green otherwise.
Complaints & Compliments	Red if any year is red. Green otherwise.
Colleague Feedback (MSF)	Green if any year is green. Red otherwise.
Patient Feedback (PSQ)	Green if any year is green. Red otherwise.
MAG Statements	Green if all years are green. Amber otherwise.
Annual Status	Green if all years are green. Amber otherwise.