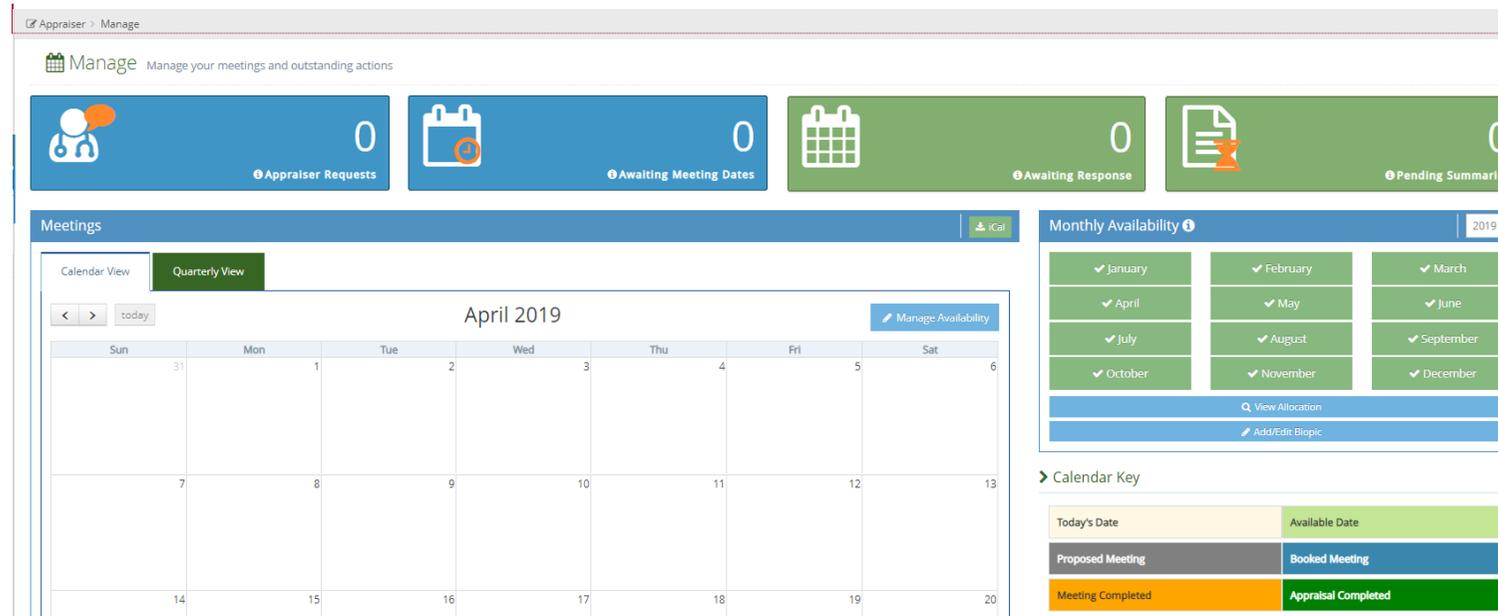


## Quick MARS Guide – Appraiser Role

There are a couple of ways to set a meeting up on MARS and people use this in different ways. A common approach is that the appraisal is agreed outside of MARS and then put onto the system. To access the Appraiser pages select 'Appraiser' on the left hand menu and you have 2 pages – Manage & Appraisals The MARS process is;

Doctor selects Appraiser from their list > Appraiser accepts request > Appraiser can either send Doctor a selection of dates/times to choose from OR Appraiser can just input the meeting directly into the calendar.

The Appraiser > Manage page looks like this;



Appraiser > Manage

Manage your meetings and outstanding actions

Appraiser Requests 0

Awaiting Meeting Dates 0

Awaiting Response 0

Pending Summaries 0

Meetings Cal

Calendar View **Quarterly View**

April 2019 Manage Availability

Monthly Availability 2019

✓ January ✓ February ✓ March

✓ April ✓ May ✓ June

✓ July ✓ August ✓ September

✓ October ✓ November ✓ December

View Allocation

Add/Edit Biopic

Calendar Key

Today's Date Available Date

Proposed Meeting Booked Meeting

Meeting Completed Appraisal Completed

**Commented [RN(1): APPRAISER REQUESTS** – These will appear in the top left hand box. If you click on the box you will have the option to accept/reject requests, You will only be available to DVLA Doctors.

**AWAITING MEETING DATES** – Once you've accepted a Doctor they will move to this box. If you choose to send a selection of dates/times, you can click on this box, select your date(s) and click send. The Doctor will then move to the '**Awaiting Response**' box

Alternatively, if you have already agreed the meeting date/time, you can input the date directly into the calendar. You just need to click on your desired date & a pop up box will appear. You choose the Doctor who is on your list and select a time. Once saved this part of the process is complete.

The next page you have is Appraiser > Appraisals

Here you will see a list of the Doctors you have accepted to appraise. You can switch tabs and view any previous appraisals you have undertaken.

Meeting Date	First Name	Last Name	Email	AQ	OOQ	App. Info.	Summary Builder	Ext. Circ.	Meeting Complete	Commit Summary	Comments	Last Appraisal
20/05/2019 08:00	Becy	Newton	rebecca.newton@wales.nhs.uk	Jan-Mar 2019	✓				<input type="checkbox"/>	Pending		

**Commented [RN(2): Please note:** In order to view a Doctor's information, you need to have a meeting date in place. The information will become available to you within 30 days of this meeting date,  
  
There is also a 'lockout' period for the Doctor prior to appraisal. They will not be able to add further appraisal information within 7 days of the meeting date.

Here is the meeting date & time. You can cancel the meeting using the red cross but do not do this if you have started the appraisal summary.

You can click the blue person symbol here and you will see a pop-up box with the Doctor's full personal & professional information

Here is the Doctor's Allocated Quarter in which they should undertake their appraisal (this is aligned to Revalidation if possible)

Here you can view all the appraisal information entered by the Doctor. You can view this on-screen or use the download option

Here you will create a summary of the appraisal, mark the meeting as complete and 'commit' the summary to the Doctor

**Commented [RN(3):** To edit a meeting date, you should go to Appraiser > Manage and in the calendar go to the meeting date. Click on the meeting (which should be blue) and a pop up will appear. You can amend the meeting date and save.

Dr's Current Profile

Personal and Professional Information | **Appraisal Information** | Activities | Job Plan

**Personal Information**

Username/Email: rebecca.newton@wales.nhs.uk

First Name: Becy | Last Name: Newton

Known As: | Gender: | Date of Birth: |

**Preferred Contact Information**

Address: | Town: | County: | Postcode: | Contact Number: 02920687509

**Professional Information**

GMC Number: 7414789

Speciality: Clinical Genetics

Status: Substantive consultant post

Health Board: DVLA

Other Relevant Qualifications: |

**Main Employment**

Health Board: Hospital | Primary

Appraisal Summary for Becy Newton GMC#:7414789

Download PDF

Information	Sections	Supporting Documents
<p><b>Personal Information</b></p> <p>Title of event: CPD course</p> <p>Activity: This is where the Doctor will enter all the relevant information for their appraisal. The Doctor can also upload supporting information to support their written entries. This is the activity I have undertaken</p> <p>Reason: This is the reason I have done this</p> <p>Reflection: This is my reflection</p> <p>Outcome: This is the outcome</p>	<p>Domain 1 - Knowledge, Skills and Performance</p>	<p>File Supporting Information</p>
<p><b>Patient and Colleague Feedback</b></p> <p>Patient Feedback: Here the Doctor will write their reflections on their patient feedback</p> <p>Colleague Feedback: Here the Doctor will write their reflections on their colleague feedback</p>	<p>Colleague Feedback</p>	<p>File 360 report</p>
<p><b>Clinical Audit</b></p> <p>Title and date(s) of audit: My Clinical Audit</p> <p>Your role in the audit How does this represent your practice?: Fake text relating to this audit</p> <p>Summary of results: Summary of results following the audit cycle</p> <p>Summary of changes made: Summary of the changes I have made to my practice</p> <p>Reflection: This is my reflection following the audit</p>	<p>Domain 2 - Safety and Quality</p>	<p>File Audit report</p>

Close

## Creating the appraisal summary

We have a 'summary builder' to create the appraisal summary, there are 6 tabs to work through in total.

### 1. Overview

This is where you can add professional context and review the Doctor's declarations.

Summary Builder Appraisal summary for Beccy Newton

Overview Information Constraints Insights & Reflections PDP Revalidation

Appraisal Summary Declaration

By committing this summary you confirm that either:-

- An appraisal has taken place that reflects the scope of the doctors work.
- A review of last year's personal development plan has taken place and any reasons for non-completion are recorded.

Or

- I have completed the appropriate governance protocol

Appraiser: Robin Cordell  
Meeting Date: 20/05/2019  
Summary Committed: ✖  
Summary Agreed: ✖

Professional Context: [Add Information](#)

Probity and Declarations

Unlock Declarations for Doctor	<a href="#">Unlock</a>
Confirm Personal and Professional Details (Scope of Work) <a href="#">View Doctor details</a>	<a href="#">Agreed</a>
Probity (Good Medical Practice)	<a href="#">Agreed</a>
Probity (Appraisal Material)	<a href="#">Agreed</a>
Health	<a href="#">Disagreed</a> • Domain 1 - Knowledge, Skills and Performance
Directives or Suggestions from Outside Agencies	<a href="#">Agreed</a>
Complaints	<a href="#">Disagreed</a> • Patient Feedback
Safeguarding Children	Level 3
Training Role(s)	No training role

Complaints types:  
New Complaints

Appraiser Comments: [Add Information](#)

**Please note:** If the Doctor has completed their declarations incorrectly, you are able to 'unlock' these on this screen. This will allow the Doctor to login and re-complete their declarations.

## 2. Information

When you first go to the information tab, this will be blank, bar the information headings. This is where you can copy the Doctors information in to the summary.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Overview, Information, Constraints, Insights & Reflections, PDP, and Revalidation. The 'Information' tab is active. Below the navigation bar, there is a list of categories with expandable arrows: Domain 1 - Knowledge, Skills and Performance; Domain 2 - Safety and Quality; Domain 3 - Communication, Partnership and Teamwork; Domain 4 - Maintaining Trust; Insights and Reflections; Probity & Complaints; Patient Feedback; Colleague Feedback; and Teaching, Research, Leadership and Innovation. In the top right corner of this section, there are two buttons: 'Add Doctor's Information' and 'Create New Information'. A callout box with an arrow points to the 'Add Doctor's Information' button, containing the text: 'Here you should select 'Add Doctor's Information' and a pop up box will appear.'

Below the main interface, a pop-up dialog titled 'Add Appraisal Information to Summary' is displayed. It contains the following text: 'Select appraisal information would you like to add. You can select up to X to be merged together in the next step. Choosing to "Add All Evidence" (bottom left) will add all the of Dr's information to the summary under the sections chosen by the Dr.'

Type	Title	Domain	Supporting Documentation	Selection
Personal Information	CPD course	Domain 1 - Knowledge, Skills and Performance	Fake Supporting Information	<input type="checkbox"/>
Patient and Colleague Feedback	Here the Doctor will write their reflections on their patient feedback	Colleague Feedback Patient Feedback	Fake 360 report	<input type="checkbox"/>
Clinical Audit	My Clinical Audit	Domain 2 - Safety and Quality	Fake Audit upload	<input type="checkbox"/>

At the bottom of the dialog, there are three buttons: '+ Add All Information', '> Add/merge Selected', and '✕ Close'. A callout box with an arrow points to the '+ Add All Information' button, containing the text: 'You can copy the information over in 2 ways. Either just 'add all' or you can choose to merge similar entries (if there were multiple entries on CPD course that were very similar for example). It all depends on how you work and what the RO likes in appraisal, some prefer summarisation and others like all the information to be copied into the summary.'

Once you have copied the Doctor's information over, you will see something like this;

The screenshot shows a web interface for professional development. It is divided into two main sections: Domain 1 and Domain 2.

**Domain 1 - Knowledge, Skills and Performance**

- Activity/Achievement:** CPD
- Title of event:** CPD course
- Activity:** This is where the Doctor will enter all the relevant information for their appraisal. The Doctor can also upload supporting information to support their written entries. This is the activity I have undertaken
- Reason:** This is the reason I have done this
- Reflection:** This is my reflection
- Outcome:** This is the outcome
- Available Supporting Documentation:** Fake Supporting Information
- Discussion and Feedback from Appraiser:** (Empty)

**Domain 2 - Safety and Quality**

- Activity/Achievement:** Quality Improvement Activity
- Title and date(s) of audit:** My Clinical Audit
- Your role in the audit How does this represent your practice?:** Fake text relating to this audit
- Summary of results:** Summary of results following the audit cycle
- Summary of changes made:** Summary of the changes I have made to my practice
- Reflection:** This is my reflection following the audit
- Available Supporting Documentation:** Fake Audit upload
- Discussion and Feedback from Appraiser:** (Empty)

On the right side of each form, there are two buttons: a red cross (delete) and a blue edit icon.

Doctor's information here

Supporting Information

Your Appraiser comments here. You can populate this section using the blue edit button on the right hand side. You can also edit the Doctor's information (if for example a patient name is included) or you can delete an entry using the red cross.

### 3 &4 – Constraints, Insights & Reflections

Here you can view any constraints & progress reflections that have been entered, along with any developmental needs.

Overview	Information	Constraints	Insights & Reflections	PDP	Revalidation
Constraint		Doctor Comment		Appraiser Comment	
Personal constraints					
Being out of hours	Dependant children	Personal time management	Here the Doctor can write free text comments relating to any personal constraints they have identified if they wish		
Hospital constraints					
Finance/availability of locums	Workload distribution		Here the Doctor can write free text comments relating to any hospital constraints they have identified if they wish		
Service constraints					
No service constraints identified		Here the Doctor can write free text comments relating to any service constraints they have identified if they wish			

Overview	Information	Constraints	Insights & Reflections	PDP	Revalidation
Reflections					
Progress Reflection		Here the Doctor can write some generic reflections on their progress during their appraisal period if they wish			
Development Needs		Here the Doctor can identify development wants/needs for their next appraisal period if they wish. The PDP on MARS is typically created by the Appraiser but the Doctor can identify PDP needs below if they wish			
Appraiser Comments					
					

**Commented [RN(4)]:** You can enter Appraiser comments (if required/applicable) using the blue edit buttons, You can also edit the Doctor's constraints if required following the meeting.

## 5. PDP

**Please note:** If this is the Doctor's first appraisal on MARS, they will not have a PDP 'from last appraisal' as we cannot add this retrospectively. If this is not their first MARS appraisal, the previous PDP will appear in the 'from last appraisal' box and the Doctor will need to indicate whether they have 'fully met', 'partially met' or 'not met' each PDP item.

To create a PDP item, select 'add new activity' on the right hand side.

Summary Builder Appraisal summary for Beccy Newton

Overview Information Constraints Insights & Reflections PDP Revalidation

Agreed Activities Agreed to be completed from this Appraisal [+ Add New Activity](#)

Area	What/Description	Why	How	Who	Outcome	Edit/Delete
From Last Appraisal Agreed to be completed from last Appraisal						
Area	What/Description	Why	How	Who	Outcome	Add to Agreed
Aspirational Activities completed this appraisal period or for future appraisals						
Area	What/Description	Why	How	Who	Expected Completion Date	Add to Agreed
Domain 2 - Safety and Quality	- This is a PDP item I wish to undertake	This is why I want to do this	This is how I will do this	This is who will complete this	This is the expected outcome	<a href="#">+</a>

Add PDP Activity ✕

Section: Domain 1 - Knowledge, Skills and Performance

Activity:

What:

Why:

How:

Who:

Completion/ Outcome:

[✓ Save](#) [✕ Cancel](#)

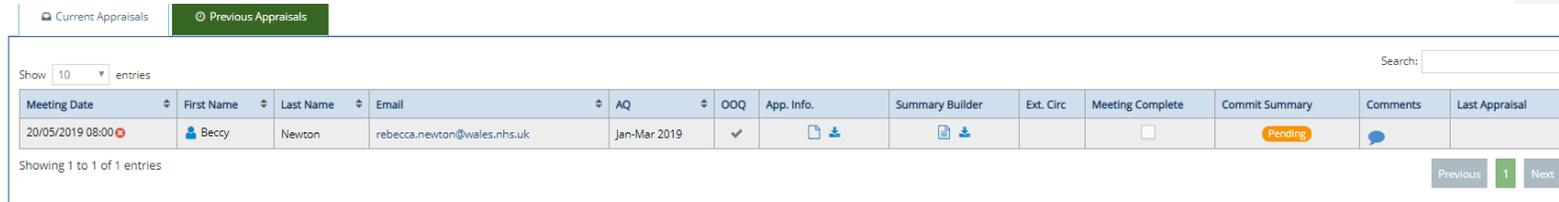
Alternatively, if a Doctor has added a PDP item through the 'Aspirational PDP' and you agree this should be moved to the agreed PDP, you can select this button to move this over.

## 6. Revalidation

The final tab is where you can indicate the status of the strands of information required for Revalidation. You can also add comments if required.

	Complete	Needs more work	Not in appraisal
<b>Scope of work</b> <small>Important Information</small>	<input checked="" type="radio"/>		<input type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>PDP Reviewed</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>CPD</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Probity &amp; Health declarations</b> <small>Important Information</small>	<input checked="" type="radio"/>		<input type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Review of Complaints and Compliments</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Significant Events</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Supporting Information - Quality Improvement Activity</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Patient Feedback</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Colleague Feedback</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<b>Whole Practice Appraisal</b> <small>Important Information</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments:	<input type="text" value="Max 136 characters"/>		
<input type="button" value="Save Revalidation Changes"/>			

Once you have created the appraisal summary and gone through the tabs in the summary builder, you will be able to finalise the appraisal.



The screenshot shows a web interface with two tabs: 'Current Appraisals' (active) and 'Previous Appraisals'. Below the tabs is a search bar and a 'Show 10 entries' dropdown. The main content is a table with the following columns: Meeting Date, First Name, Last Name, Email, AQ, OOQ, App. Info., Summary Builder, Ext. Circ, Meeting Complete, Commit Summary, Comments, and Last Appraisal. A single entry is visible for Beccy Newton, with a 'Pending' status in the Commit Summary column. Navigation buttons for 'Previous', '1', and 'Next' are at the bottom right.

Meeting Date	First Name	Last Name	Email	AQ	OOQ	App. Info.	Summary Builder	Ext. Circ	Meeting Complete	Commit Summary	Comments	Last Appraisal
20/05/2019 08:00	Beccy	Newton	rebecca.newton@wales.nhs.uk	Jan-Mar 2019	✓				<input type="checkbox"/>	Pending		

**Mark the meeting as complete** – if you select the box under ‘meeting complete’, you will be asked to confirm the meeting date again. Once the meeting has been marked as complete, the meeting date cannot be changed.

**Commit the summary** – once you are happy with the appraisal summary, select the box in the ‘commit summary’ column. This will send the appraisal summary electronically to the Doctor’s MARS account. They will receive a notification to review the summary. If the Doctor accepts the summary, the process is complete and the appraisal will revert into the ‘previous appraisals’ tab.

If the Doctor is not happy with the summary, they can ‘reject’ it, a box will pop up where they can write their comments. You can then review the summary again or have further discussion with the Doctor. The summary can then be recommitted.

**Commented [RN(5):** You will not be able to commit the appraisal summary until;

- The Doctor has saved their declarations
- The appraisals summary is not blank
- The Revalidation progress has been completed