IDF Appraisee Guide to the IDF Online Appraisal Form

The IDF Appraisee Guide is a step by step handbook on how to complete the IDF online appraisal form. This document contains detailed guidance on how to access the form, enter data, upload supporting information and electronically submit your appraisal. Simple screen shots will show you what to expect at each stage of the process, and also where you can gain further help and advice on the areas which should be covered in medical appraisal.

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1. How to access the online appraisal form

1a. As soon as you advise the IDF Administration team that you would like to be appraised a new form will be activated. The online form is accessed by logging into the Members’ Area of the IDF website. You will need to have your IDF Username & Password to hand. If you are unsure of your log in details please e-mail info@idf.uk.net.

1b. Navigate to the IDF website; www.idf.uk.net

1c. Enter your username and password in the relevant boxes at the top of the page & then click ‘Login’.

1d. When you have successfully logged in you will see the screen below.

1e. Click on ‘My Profile’ in the top right-hand corner.
1f. You have now entered your ‘My Profile’ area of the IDF website.

1g. Select ‘View Your IDF Appraisals’ from the main menu in the middle of the screen.

1h. Your IDF Appraisal section should now be visible. You can look here at any time to check that IDF Administration have received your letter & payment. Please remember that both of these must be received before your appraisal can take place.

1i. To open your online appraisal form click on ‘View Current Appraisal Form’

***Helpful Hint: If you do not have the option to ‘View Current Appraisal Form’ please contact IDF Administration (info@idf.uk.net or 020 8432 2898) and advise that you would like to be appraised and a new form will be activated. This button will then be visible***
2. Navigating through the form

2a. Having successfully logged in and opened your appraisal form you should now see the Contents page.

2b. To navigate from one section to another click on 'Prev' and 'Next' at the bottom of each page.

2c. In any section of the form you can also navigate from one section to another by using the drop down at the bottom of the form. Just click the section title between the 'Prev' & 'Next' buttons to view the menu.

***Helpful Hint:*** The section titles in the contents list contain links for each section. For example, if you want to navigate straight to Section 8 simply click Section 8 in the contents list and you will be redirected to the requested Section.***

2d. When navigating through the form, in order to avoid any risk of data loss, please use only the "Next >>" and "<< Prev" buttons or the section navigation menu at the bottom of each page and not the "Back" and "Forward" buttons in your browser. You can part-complete the form and come back to it as many times as necessary to complete the required information.
3. Help boxes

3a. The help sections show information about what should be included in each field, and links to further sources of information.

3b. The following logo will be visible at the start of a help box.

3c. To read all the help information click the "more..." button.

3d. When you have selected the "more..." button the help box will expand.

3e. Web links to further sources of information are available within many of the help boxes. To access these click on the light blue text.
4. Adding new items to the form

4a. Various sections of the form require you to add your appraisal information as an ‘item’. Once you have entered your information the text will be displayed in a list. To see how to add a new item please navigate to Section 4 – Scope of Work.

4b. To add an item please click the blue ‘Add New Item’ button.

4c. A list of relevant fields is now visible and you will need to complete the appropriate fields.
4e. Your item will then be saved and visible in your Scope of Work list.

4d. Then click the 'Submit' button (not 'Save') to finalise the item.

4f. If you realise you want to edit your item click the ‘Edit Entry’ button. You will need to submit your item again when you have completed your changes.

4g. To add a further item click the ‘Add new item’ button and repeat the process.

***Helpful Hint: Remember every time you move from one section to another the form automatically saves. If you wish to save the form at other times please click the ‘Save’ button at the bottom of each page. ***
5. Accessing Reflective Templates

5a. Although not mandatory the IDF has a wide range of reflective templates together with suggested audit and CME log templates which are available to members via the Appraisal Section of the IDF website.

5b. To navigate to the Appraisal section please click ‘Appraisal’ on the left hand menu.

5c. Please scroll down the Appraisal page until you see the documents section. This section list the appraisal documents and guidance the IDF has available to members.

5d. To download a template double click on the blue text. You will then need to save the document to your computer directory.

6. Attaching Documents to the Appraisal Form

6a. The form allows you to upload supporting information at various relevant points. Many types of file can be uploaded as supporting information, including Word and Excel documents, PowerPoint slides, PDFs and image files. Please note that all supporting information should be attached to the form unless absolutely impossible, e.g. the documentation contains patient identifiable data to such an extent that to anonymise it would render the document meaningless. To see how to attach documents please navigate to Section 6 – Record of Annual Appraisal.
*Please note that depending on which browser you are using the attach facility will be displayed slightly differently. For example when using Safari you will have the option to ‘Choose File’ instead of ‘Browse’.

6b. Where there is an opportunity to upload a file a ‘Browse’ button will be visible.* Please click the ‘Browse’ button.

6c. The Browse button will bring up the directory of files saved on your computer. You will need to navigate through the menus to find the file you need to upload.

6d. When you have located your file click on the file and then select ‘Open’.

6e. If your document is in paper form it will be necessary for you to scan the document to create an electronic file so that it can be uploaded to your appraisal form.
6f. When the file had been successfully attached it will be visible next to the ‘Attachments’ heading. Please note that depending on your internet speed and the size of the file it can take a few minutes for each file to be uploaded to the form.

6g. Some file types may not be compatible with the form. If you try to upload one of these, a warning box will tell you that it is not possible. If this occurs, please contact IDF Administration for guidance.

***Helpful Hint: Due to technical limitations, filenames for uploaded files can only contain certain characters. These are: A-Z, a-z (upper or lower case letters), 0-9 (digits), _ (underscores), - (hyphen or minus sign), . (dot or full stop). A wider range of characters are safe for filenames not being used on the web so you may need to amend existing files before uploading them.***
6h. If you wish to attach any additional documentation this can be done in Section 14 - Additional Information.

6i. Please select the ‘Add New Item’ button

6j. Please complete the ‘Description’ field and attach your document. Then click the ‘Submit’ button to save the item.
7a. The form requires you to enter data through various different formats, these include adding new items, attaching documents, selecting option boxes and completing free text boxes. It is important to remember that an asterisk (*) next to a question denotes that the field is mandatory.

7b. For example, in Section 14 the IDF requires you to upload a copy of your indemnity certificate.

7c. On various sections of the form you are required to enter your information into a free text box. To see how to do this please navigate to Section 5 – Record of Annual Appraisals.

6k. Your item will then be saved and visible in your ‘Additional Information’ list.
7e. Several questions on the form require you to select your answer form a drop down menu. Please navigate to Section 7 - Continuing Professional Development to view an example of this.

7f. The first question ‘Are you a member of a Royal College or Faculty?’ uses the drop down format. To select your answer click the black down arrow.
7g. A list of possible answers will be visible. Please select your answer.

7h. Having done this your answer will be visible next to the black down arrow.

7i. When completing the online form you are also required to complete various answers by selecting one of two options. To see an example of this please navigate to Section 8 – Significant Events.

7j. To select an answer click the circle next to the appropriate statement.
8a. Once you have completed sections 3-17 of the form and attached your supporting information you should submit your form to your appraiser, which locks the contents of these sections. To submit your form please navigate to Section 17 - Pre-Appraisal Preparation & Submitting the Form to your Appraiser and scroll to the bottom of the page. Please note you must electronically submit your completed form to your appraiser at least two weeks prior to the appraisal date.

8b. Please read the Statement of Assurance and tick to confirm your acceptance.

8c. Please click ‘Notify Appraiser’ to submit the form to your appraiser.
8d. When you have successfully submitted your appraisal form a blue box will be visible at the top of Sections 3-17 confirming the form has been locked, as you have submitted the form to your appraiser.

***Helpful Hint: When you submit the form your appraiser will be notified by email. They will be able to log in and view your information and attachments in preparation for your appraisal meeting.***

8e. If when you click ‘Notify Appraiser’ you receive a red error message this means your form has NOT been locked & submitted as not all mandatory fields have been completed.

8f. Here you can see the red error message box resulting from failure to complete at least one mandatory field.

8g. If you receive this error message we advise you to review your appraisal form to ensure that you have completed all the mandatory fields.

***Helpful Hint: The following fields within the form are mandatory:

- Section 3: Name, GMC number, name of designated body & indication of whether you are a clinical academic requiring a second appraiser under the Follett principles are mandatory
- Section 7: Indicate whether you are a member of a Royal College or Faculty
- Sections 9 & 11: Declarations re significant events & complaints are mandatory
- Section 13: Response re: probity obligations, declaration re: suspensions, restrictions or investigations and response re: personal health obligations are mandatory
Section 14: Uploading a copy of your current indemnity certificate is mandatory
Section 15: Planned PDP proposals are mandatory
Section 17: Pre-Appraisal preparation domains 1-4 and statement of assurance are mandatory***

8h. There is an unlock facility on the form should you realise that further information needs to be added. Your appraiser would then wait until the form is locked again before continuing to prepare for the appraisal.

9. Reviewing and Confirming Acceptance of Appraisal Form

9a. Sections 18-20 of the appraisal form will be completed during or shortly after the appraisal meeting by your appraiser. You will be notified by e-mail once your appraiser has completed these sections ready for your review.

9b. To review Sections 18-20 log in and navigate to Section 18. Your appraiser’s comments will be visible.

9c. If you are happy with the content of Sections 18-20 you do NOT need to Unlock Sections 18-20. Please navigate to Section 20 - Appraisal Outputs and scroll to the bottom of the page.
9e. As the same version of the form has been electronically signed by both parties the appraisal process is complete. You and your appraiser will receive a confirmation e-mail from IDF Administration including a link to download 2 pdf copies of your appraisal form (one of the complete form and the other of sections 18-20) and details of how to give feedback on the appraisal process.

9f. An example of a complete appraisal form. This form cannot now be edited. At this point IDF Administration will be notified that the process is fully complete.
10. Unlocking Sections 18-20

10a. If you are not entirely happy with the content of Sections 18-20 and you wish to make changes, you will need to unlock sections 18-20. Please note if you unlock these sections, both you and your appraiser will then need to confirm submission.

10b. To unlock Sections 18-20 you will need to click the unlock button at the top of the page.

10c. When you have successfully unlocked Sections 18-20 there will be no blue box visible at the top of the page and the fields will become editable.

10d. Once you’ve completed your changes please follow the guide instructions in sections 8c-8f to lock and submit your appraisal form.

11. General Notes about submitting your appraisal form.

11a. The blue text boxes at the top of each section explain the status the appraisal form is in at any time. If no blue box is visible it means the fields in that section are editable by you, the appraisee.

11b. Please note if you unlock Sections 18-20 of the appraisal form your appraiser will need to log in and review your comments before re-confirming submission.
11c. Your appraiser will then also be able to unlock Sections 18-20 if they wish to make further changes. You will be notified by e-mail that your appraiser has unlocked Sections 18-20 of the form and while these sections are unlocked they will not be visible or editable to you. Once your appraiser has locked and submitted the form you will receive an e-mail prompting you to log in and re-confirm submission of the form.

11d. When exactly the same version of the form has been electronically signed by both parties the appraisal process is complete. The form can no longer be edited. Please note: if you find you need to unlock the form after both appraiser and appraisee have confirmed submission please contact an IDF Administrator via rachel@idf.uk.net and info@idf.uk.net or by phone on 020 8504 6568.

11e. A pdf of the information you have entered can be accessed at any point by clicking on the ‘Download’ button in section 21. At the end of the process you should save and keep a copy of the final pdfs together with your supporting information for future reference.