

PReP Quick Reference Guide

Appraisee



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1. Logging In

- Enter your **Username** and **Password** on the PReP login page and click on the **Login** button.
Tip: Your username is your GMC/GDC number. A password should have been sent to you by your System Administrator. If you forget your password, click on the **Forgotten your login details?** link. Remember that passwords are case sensitive.
- When you log in for the first time, you will be asked to read and confirm agreement with the Data Protection Statement – click on the **I agree with Data Protection Statement** check box and click on the **Submit** button. You will then be prompted to provide details of your most recent appraisal – enter the **Meeting Date** and the **Appraiser Name** and click on the **Save details of last appraisal** button. Next, you may be prompted to enter some personal details so that your account can be activated – click on the **Go to your profile** button. Enter as much detail as you can and click on the **Save** button – these details can be updated later if necessary. Scroll up to the top of the screen and click on the **Home** tab.

2. The Home Page

- Click on the **Home** tab (top-right of the screen) to return to the Home Page at any time.



Main Navigation Bar



The Progress Bar



The Progress Bar is designed to guide you through your appraisal process:

- Keeping your **General Information** (personal details, addresses etc) up to date
- Choosing an **Appraiser**
- Building up your **Scope of Work** (qualifications, work history etc)
- Recording and reflecting on the **Supporting Information** (activities, research, documents etc) you wish to submit
- Setting a **Meeting Date**
- Submitting an **Input Form** to your Appraiser prior to the meeting
- Approving the **Output Form** after your Appraisal meeting
- Completing a **Feedback Questionnaire** to finish the appraisal process

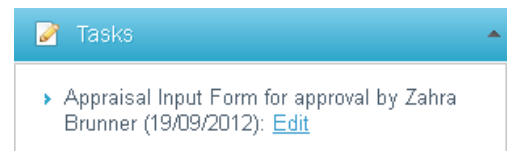
Key	
●	Complete
●	In progress
●	Action required
○	No immediate action required
○	No action required

Tip: The Progress Bar is colour-coded to show the status of each step.

Widgets

There are several widgets on your Home Page:

- **Alerts** - general messages appear here
- **Access** - see who has access to your Portfolio etc
- **Tasks** - complete these tasks to proceed with the appraisal process
- **Useful Links** - click on a link for more information
- **Appraisal Details** - gives important information about your appraisal



Tip: Drag the blue title bar to reposition the widget, or click on the triangle to collapse/expand the widget. Clicking on the title of some widgets opens a related screen.

Choosing an Appraiser

Check the details shown in the Appraisal Details widget. If an Appraiser's name is not shown or if you want to change your Appraiser:

1. Click on the **Appraiser** link in the **Appraisal Details** widget.
2. Enter part of the name of the person you would like to be your Appraiser in the **Appraiser** search box.

If that person has the Appraiser role, their name will appear in a list on-screen.

Tip: If the person's name does not appear in this list, check the spelling, or type a different name.

3. Click on their name in the list and click on the **Update** button.

Tip: Note that you can also set an Academic Appraiser at this stage if required.

Recording your Appraisal Meeting Date

Your **Appraisal Anniversary** is the same date each year and determines your **Next Appraisal Due Date**. These are displayed in the **Appraisal Details** widget on the Home Page.

- Click on the **Next Appraisal Meeting Date** link to set or change the date of your planned appraisal meeting.

Tip: A missed Due Date is flagged in **red**.



3. General Information

Keeping your Personal Details up to date

It's important to keep these details up to date as they are used to populate your Appraisal Input Form.

1. Hover over **General Information** on the **Main Navigation Bar** and select **Update Profile** from the list.
2. Use the **Edit** and **Add Address** buttons to make changes to information on the **User Details** tab, including:

- | | |
|----------------------------|------------------------------|
| • Contact Email Address | • Date of First Registration |
| • Profile Picture | • Specialty |
| • Contact Telephone Number | • Grade |
| • GMC Registered Address | • Registration Type |

Tip: Some details can only be edited by the System Administrator. Contact your System Administrator to update these elements for you. If you are a Clinical Supervisor or Educational Supervisor see the *Supervisor Roles Quick Reference Guide* for details.

3. Use the **Login Details** tab to change your password if required.

Adding an Area of Work

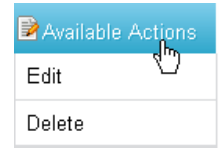
Compile a record of your work history and current commitments (paid or voluntary) by adding the details of each as an Area of Work to build the full picture in your Scope of Work.

1. Hover over **General Information** on the **Main Navigation Bar** and select **Add Area of Work**.
2. Complete all required fields (marked with a red asterisk *****) and click on the **Save** button.

Viewing your Scope of Work

The Scope of Work lists all Areas of Work – this list is included on your Appraisal Input Form.

1. Hover over **General Information** on the **Main Navigation Bar** and select **List Scope of Work**.
2. Click on the **View** link in the **Action(s)** column to view details of an entry.
3. Use the options in the **Available Actions** menu to **Edit** or **Delete** an entry.



Adding Qualifications

Add details of all relevant Medical Qualifications and mark your Primary Qualification as such.

1. Hover over **General Information** on the **Main Navigation Bar** and select **Add Qualification**.
2. Complete all required fields (marked with a red asterisk *) and click on the **Save** button.

Listing and Editing Qualifications

A list of your Medical Qualifications will appear on your Appraisal Input Form.

1. Hover over **General Information** on the **Main Navigation Bar** and select **List Qualifications**.
2. Click on the **View** link in the **Action(s)** column to view, and to save the details to PDF if required.
3. Click on the **Edit** link in the **Action(s)** column to edit the details, or **Delete** to remove the qualification.

4. Supporting Information

Adding Supporting Information Items

You should add Supporting Information to your Portfolio. This will appear on your Appraisal Input Form and is used to support your appraisal and subsequent revalidation. Supporting Information can be any activity or event that you feel appropriate to the appraisal/revalidation.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **Add Supporting Information Item** from the list.
2. Enter a **Title**, **Start Date** and **End Date** (the date and time are optional).
3. Select an **Activity Type**.
4. Use the **Details** text box to record the Supporting Information Item's particulars.
5. Add any **Supporting Documents** that support your record such as a certificate, a file previously uploaded to your Portfolio, or a link to a website. If documents have been previously uploaded they will appear in the **Select existing Document** list – if the document required is not listed, use the **Create New Document** button to add it now. See *Adding Documents* on page 7 to learn how to add documents to the **Select existing Document** list.

The image shows a user interface for selecting documents. At the top, there is a label 'Select existing Document:' followed by a dropdown menu and the text 'or Create New Document'. Below this, there is a list of three documents: 'Agenda 2011', 'Report 2011', and 'Attendee list 2011'. Each document entry has a 'remove' link to its right.

6. The Supporting Information can also be linked to a corresponding **Development Need** from your current **PDP** (Personal Development Plan).

7. If the date of the Supporting Information has passed, you can add your reflection by choosing the **Add Your Reflection** option and completing the remainder of the form. If no reflection is required, select the **Reflection Not Applicable** option. If you do not choose one of these options now, you will need to return to this item later to do so – see *Supporting Information Awaiting Reflection* on page 6 for more information.
8. Click on the **Save Details** button to save the Supporting Information to your Portfolio or **Save and Link Categories** to link to the **Supporting Information Categories** and **Good Medical Practice Guidelines** before saving.

Working with Supporting Information Items

A list of Supporting Information Items will appear on your Appraisal Input Form, grouped by category.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **List Supporting Information** from the list.
2. Use the **Filters** to filter the list by **Appraisal**, **Type** or **Dates** if required.
3. Click on a column heading e.g. **Title** to sort the list.
4. Click on the **Delete** link in the **Action(s)** column to remove the item from the list.
5. Click on the **View** link in the **Action(s)** column to view the details of an item.
6. Then, use the **Edit** tab to make changes e.g. add a reflection, the **Associations** tab to associate the item with Supporting Information Categories, or the **Appraisal** tab to assign the item to an appraisal.

Tip: It is important to associate and assign an item correctly as this will determine whether these details appear on your Appraisal Input Form, or not. Items previously assigned to an appraisal that is now Closed or Under Review, cannot be deleted or edited.

Supporting Information Awaiting Reflection

Once the date of a Supporting Information Item has passed, it is advised that you should add a reflection. Describe what you think the supporting information says about your practice and what changes you intend to make in future if any.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **Supporting Information Awaiting Reflection** from the list.
2. Click on the **View** link in the **Action(s)** column to view the details of the item that is to be reflected upon.
3. Click on the **Edit** tab, scroll down, and select the **Add Your Reflection** option button.
4. Add a reflection and describe how this Supporting Information will change the way you work.
5. If appropriate, select the number of **CPD Points**.
6. Click on the **Save Details** button.

Activity Types Summary

The Activity Types Summary screen brings together information about your PDP (Personal Development Plan), the number of activities by Type, CPD points and Special Circumstances.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **Activity Types Summary** from the list.
2. Use the **Filters** to filter the by **Date** if required.
3. Click on the **Print Certificate** button to print a copy of the summary.

Tip: This can only be done if all Supporting Information Items have either been marked as Reflection Not Applicable, or have been reflected upon.

Adding Documents

As we have seen already, documents can be linked to Supporting Information Items. Rather than having to upload the document while creating the Supporting Information Item, it is possible to create a list of documents from which to choose instead. Files created within Microsoft Office and many other programs can be imported in their original formats, however, data entered into other programs or systems may need to be extracted and saved as a named file. Look for an **Export** or a **Save as** option. If possible, save the file in PDF format. Individual files are limited in size to 10MB.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **Add Document**.
2. In the **Add a Document** screen, enter a descriptive **Title** for the document.
3. Choose **File** from the **Type** drop-down list.

Tip: Alternatively, choose the **URL** option to create a link to a website; or choose **Paper copy** if the data does not exist in electronic format – enter a description of the data here and bring hard copies of the documents to your appraisal meeting.

Title *	<input type="text" value="Annual Conference 2011 Agenda"/>
Type *	File
Description	<input type="text" value="I prepared this agenda using input from management and staff, and feedback from last year's conference."/>
Date Added	01/10/2012
File Upload	<input type="text" value="(188 KB - view)"/> <input type="button" value="Browse..."/> Maximum size: 10 MB

4. Click on the **Browse** button and in the **File Upload** dialogue box, locate and select the file.
5. Click on the **Open** button in the **File Upload** dialogue box, and then click on the **Save Details** button.

Tip: These documents can now be linked to Supporting Information Items, see page 5. Documents will not appear on your Appraisal Input Form unless they are linked to Supporting Information Items.

Working with Documents

These documents will only appear on the Appraisal Input Form if they are linked to a categorised Supporting Information Item in the current open appraisal.

1. Hover over **Supporting Information** on the **Main Navigation Bar** and select **List Documents**.
2. Use the **Filters** to filter the list by **Type** or **Dates** if required.
3. Click on a column heading e.g. **Title** to sort the list.
4. To *view* details, click on the link in the **Title** column. Then, to *open* an imported file/link, click on the **Download file** or **Go to URL** link in the **View Document** screen.

Title	Annual Conference 2011 Agenda
Description	I prepared this agenda using input from management and staff, and feedback from last year's conference.
Date Added	01/10/2012
Available action	Download file

5. Click on the **Delete** link in the **Action(s)** column in the **Personal Documents** list, to remove the item from the list.
6. Click on the **Edit** link in the **Action(s)** column in the **Personal Documents** list, to edit the details of the document.

Tip: Documents assigned to an appraisal that is Under Review or Closed cannot be deleted or edited.

7. Click on the **Appraisal** tab (on the **Edit Document** screen) to assign the document to an Open or Pre System appraisal.

Data Imports

If data has been imported by your System Administrator, you will see **List Statutory Mandatory Training** and/or **List Audits** options listed when you hover over **Supporting Information** on the **Main Navigation Bar**. You may also find an automatically created Supporting Information Item called **CHKS** in your **Supporting Information** list. More information about data imports in the *Data Imports Quick Reference Guide*.

5. Appraisals

Understanding Appraisals

- Hover over **Appraisals** on the **Main Navigation Bar** and select **List Appraisals**.
- When you first logged in to the PReP system and entered/confirmed the date of your most recent appraisal meeting, two appraisals were created automatically – a new, **Open** appraisal, and an **Undertaken Pre System** appraisal.
- The **Undertaken Pre System** appraisal is added to your Portfolio as a record of your last appraisal and sets both the **Appraisal Anniversary** and the **Start Date** of the newly opened appraisal.
- If you would like to record the details of an even earlier appraisal, hover over the **Available Actions** menu (towards the top-right of the **List Appraisals** screen) and select **Add Historical Appraisal**.
- Until your Appraisal Input Form has been submitted to your Appraiser, the current appraisal remains **Open** and you can continue to assign Supporting Information Items to it.
- Once you have submitted your Appraisal Input Form the appraisal is locked and marked as **Under Review**.
- Following your meeting, your Appraiser will send you an Appraisal Output Form – once you approve this and complete the Appraisal Feedback Questionnaire, this appraisal is **Closed** and another, new appraisal for the next appraisal period is opened.

Checking Progress

1. Hover over **Appraisals** on the **Main Navigation Bar** and select **List Appraisals** from the list.
2. Click on the **Review progress** link under the **Open** appraisal.
3. Compare the number of **Suggested** and **Assigned** items of supporting information- it is advised that each item of supporting information should be associated with a category.
4. Click on the **List assigned items** tab to see a list of all supporting information assigned to this appraisal.

Tip: If you have added a Supporting Information Item and it does not appear on these tabs, go to **Supporting Information > List Supporting Information**, **View** the item, and use the **Associations** and/or **Appraisal** tabs to categorise and/or assign the item appropriately.

Dealing with Outstanding Appraisal Forms

- Hover over **Appraisals** on the **Main Navigation Bar** and select **Outstanding Appraisal Forms**.

This screen lists Appraisal Forms that require your attention or that are awaiting the attention of others (e.g. your Appraiser).

Tip: Completed forms are listed on a neighbouring tab.

Recording a Special Circumstance

A special circumstance is an event that has occurred during the appraisal period that your Appraiser should know about e.g. if you have been on sabbatical for several months.

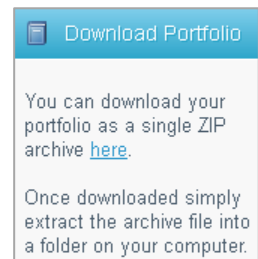
1. Hover over **Appraisals** on the **Main Navigation Bar** and select **Add Special Circumstance** from the list.
2. Select a **Special Circumstance Type** from the drop-down list.
3. Enter a **Start Date** and an **End Date**.
4. Click on the **Save Special Circumstance** button.



6. Viewing and Extracting Portfolio Entries

Portfolio entries can be listed in various ways, and can also be exported to a single, compressed file. This is useful if you would like to keep a copy of your data outside of the PReP system for future reference.

1. Click on **Portfolio** on the **Main Navigation Bar** to access details of your Portfolio.
2. The **Supporting Information Categories** tab lists Supporting Information Items that have been associated with at least one category.
3. The **Good Medical Practice Guidelines** tab lists Supporting Information Items that have been associated with at least one guideline.
4. The **Type** tab lists items by type.
5. The **Diary** tab shows items on the appropriate dates.
6. The information on each of the tabs can be **filtered**.
7. **Documents** and **Supporting Information Items** can be added to the Portfolio directly from each tab.
8. Use the **Download Portfolio** link to extract a copy of all Portfolio entries if required.



7. Updating your Personal Development Plan

A PDP for the current appraisal period was created automatically when the appraisal period was opened. During the appraisal period, you should update this PDP by adding Development Needs, reflecting on them and marking them as achieved. Your Appraiser must agree with each Development Need that you add, and may add additional Development Needs for you. Your current PDP and that for the next appraisal period will be discussed during your Appraisal Meeting.

Viewing PDPs

1. Hover over **PDP** on the **Main Navigation Bar** and select **List PDPs** from the list. All PDPs are listed and can be viewed.
2. Click on the name of the PDP in the **Description** column to view its details.
3. Use the **Associations** tab to associate the PDP with a **Supporting Information Category** and **Good Medical Practice Guidelines**.

Adding and Editing Development Needs

1. Hover over **PDP** on the **Main Navigation Bar** and select **List PDPs** from the list.
2. Click on the PDP's **Description** link and scroll down to Development Needs.
3. Click on the **Add New Development Need** button.

Tip: Both Appraiser and Appraisee can add Development Needs to an Appraisee's PDP.

4. Complete all required fields and click on the **Save Development Need** button.
Tip: The *Appraiser* must agree with all Development Needs you add by marking them as **Agreed**.
5. Use the links in the **Action(s)** column to **Edit, Delete, Reflect** upon or **Achieve** a Development Need.
Tip: You cannot delete Development Needs added by your Appraiser. Review your Development Needs regularly. Mark them as Achieved and add a Reflection when appropriate.

DEVELOPMENT NEEDS					
Title	Target Completion Date	Status	Achieved	Reflection	Action(s)
Public Speaking		Deferred	No	No	Reflect
Presentation Skills	31/12/2012	New	No	No	Edit, Delete, Reflect, Achieve

Marking a PDP as Complete

The *Appraiser* needs to ensure that all Development Needs are marked as **Agreed** and then change their status to **Completed, Deferred** or **Cancelled**. The *Appraiser* can then mark the PDP as **Complete**. A new PDP will be created automatically for the new appraisal period, and any **Deferred** Development Needs will automatically be transferred to the new PDP and populated onto the Appraisal Output Form.

8. Completing your Appraisal Input Form

The Input Form link will be available on the Progress Bar *if* the Meeting Date has been set and *if* you have selected an Appraiser.

1. Click on the **Input Form** link on the Progress Bar to open the form.
 Your Appraiser’s name and the date of your meeting as entered earlier are displayed near the top of the form for you to check.
2. If correct, complete the **Appraisal Input Form** fields as required.
Tip: Save as draft marks the form as **Incomplete** - the form is available via the Progress Bar, to edit at a later date.
3. Click on the **Submit and send to other party** button to submit the form to your Appraiser for approval.
Tip: The information on the **Appraisal Input Form** will be discussed during your appraisal meeting and will be signed-off (approved) by the Appraiser. The form can still be viewed while awaiting approval by choosing **Appraisals> Outstanding Appraisal Forms**.
Tip: If you also have an Academic Appraiser the form will automatically be sent (once approved) from the Appraiser to the Academic Appraiser for *their* sign-off.
Tip: Once the form has been signed-off by the Appraiser (and Academic Appraiser if you have one), a copy of the form can be found under **Appraisals> Completed Appraisal Forms**.

9. Approving your Appraisal Output Form

Once the Appraisal meeting has taken place, your Appraiser will initiate the Appraisal Output Form. Once completed by your Appraiser (and approved by the Academic Appraiser if you have one), the form will be sent for your approval.

1. Locate the form in the **Tasks** widget on your **Home Page**, or hover over **Appraisals** on the **Main Navigation Bar** and select **Outstanding Appraisal Forms** from the list.
2. **Approve** the Appraisal Output Form to proceed to the last step in the appraisal process.

10. Completing the Appraisal Feedback Questionnaire


When you approve the Appraisal Output Form, the Appraisal Feedback Questionnaire will be displayed automatically. Only upon completion of this form will the full appraisal cycle be completed, and a new appraisal period initiated.

- Complete the Appraisal Feedback Questionnaire and click on the **Save** button.
The Appraisal Feedback Questionnaire is submitted to your Responsible Officer. Your Appraiser will not have access to the completed questionnaire.

Tip: If you don't complete the questionnaire now, it will remain in the **Tasks** widget on your **Home Page** and **on the Progress Bar**, until you do so.

📄 Appraisal Completed

CONGRATULATIONS! YOU HAVE COMPLETED YOUR APPRAISAL



Appraisal
Details
General
Information
Appraiser
Scope of
work
Supporting
Information
Meeting Date
Input form
Output form
Feedback
questionnaire

Your appraisal for this year is now closed and a new one has been created for you.
The home page will from now on show your progress in the new appraisal year.

[Continue to the home page](#)

11. Check List

Before your appraisal meeting:

- ? Are your personal details up to date?
To check go to [General Information> Update Profile](#)
- ? Have you added your work history and qualifications?
To check go to [General Information> List Scope of Work](#) and [General Information> List Qualifications](#)
- ? Have you added supporting information and assigned it to the appropriate appraisal?
To check go to [Appraisals> List Appraisals> List assigned items](#)
- ? Have you associated each item of supporting information with an appropriate category (or categories) and good medical practice guidelines?
To check go to [Supporting Information> List Supporting Information> View](#) – if associations exist, they are listed above the Supporting Information Item heading
- ? Have you included the recommended number of supporting information items for each category?
To check go to [Appraisals> List Appraisals> Review progress](#)
- ? Have you added a reflection to each supporting information item or marked them as 'reflection not applicable'?
To check go to [Supporting Information> Supporting Information Awaiting Reflection](#)
- ? Have you added the details of any special circumstances that your appraiser should be aware of e.g. sick leave?
To check go to [Appraisals> List Special Circumstances](#)
- ? Have you added, updated and reflected on your development needs?
To check go to [PDP> open the PDP> Development Needs](#)
- ? Have you chosen an appraiser?
To check go to the [Home Page> Appraisal Details widget](#)
- ? Do you need an academic appraiser? If so, have you chosen one?
To check go to the [Home Page> Access widget](#)
- ? Have you set your meeting date?
To check go to the [Home Page> Appraisal Details widget](#)
- ? Have you completed your input form and sent it to your appraiser?
To check go to the Home Page and look at Input Form on the [Progress Bar](#) – if there is a link click it to [complete and submit the form](#)

After your appraisal meeting:

- ? Have you received an appraisal output form from your appraiser?
To check go to the [Home Page> Tasks widget](#)
 - ? Have you approved the appraisal output form sent to you by your appraiser?
To check go to the Home Page and look at Output Form on the [Progress Bar](#) – if there is a link click it and [approve the form](#)
 - ? Have you completed the feedback questionnaire?
To check go to the Home Page and look at Feedback Questionnaire on the [Progress Bar](#) – if there is a link click it to [complete and submit the form](#)
- ✓ If you can answer yes to all of these questions, congratulations, your appraisal is complete!

