THE APPRAISAL PROCESS FOLLOWING MATCHING AT LOCAL LEVEL

1. Administration Team, with guidance from the local Appraisal Leads, where appropriate, to match appraisers to appraisees, using the criteria in the matching process (see separate document)

2. Administration Team to send e-mail to appraisers informing them of their allocations
   - At this stage there is the opportunity for the appraiser to request any appraisee to be re-allocated if the need arises

3. Administration Team to send letter to all appraisees (letter 1)
   - Letter received by appraisees informing them of the appraiser they have been allocated together with any other information with regard to the appraisal process
   - Appraisees to have a minimum of 2 months notice prior to their appraisal due date
   - At this stage there is the opportunity for the appraisee to request the appraiser to be re-allocated if the need arises

4. Appraisee and Appraiser make contact
   - It is the responsibility of the appraisee and the appraiser to make contact and set a mutually convenient date for the appraisal.
     - The Administration Team at the Primary Care Taskforce to be informed of the agreed date in order to insert date on the NHS Toolkit if used (responsibility of the appraiser)
     - If the Administration Team are not notified of a date within 4 weeks of sending letter 1, and the appraiser confirms that no date has been set, a reminder will be sent (letter 2)
     - If there is no response from letter 2, and the appraiser confirms that no date has been set, reminder letter 3 will be sent by the Administration Team of the Primary Care Taskforce

5. Appraisee to organise paperwork prior to appraisal
   - Forms 1 – 3 and supporting documentation to be sent to appraiser by appraisee
   - Documentation normally to be received by the appraiser 2 weeks prior to the appraisal to allow adequate time for preparation
Any alteration to this to be mutually agreed between appraiser and appraisee, otherwise the appraiser is entitled to postpone the appraisal date

6. Appraiser and appraisee complete the appraisal discussion

- It is the responsibility of the appraiser to complete Form 4
- It is the responsibility of the appraisee to complete their PDP
- Form 4 and PDP to be agreed and signed off by both appraiser and appraisee
  - This can either be in the form of an agreed and signed e-copy from the NHS Toolkit or a signed hard copy if not Toolkit users.
  - Both to be signed off by appraiser and appraisee.

7. All paperwork can be downloaded from:


8. Form 4/PDP/Invoice

- It is the responsibility of the Appraiser to deal with the completed forms
  - Form 4, PDP and Invoice to be sent to the Administration Team of the Primary Care Taskforce.
  - On receipt of properly completed Form 4/PDP and invoice, the Primary Care Taskforce will sign off the invoice and send to be processed

9. Appraiser to be paid

10. Appraisee Evaluation Form

- It is the responsibility of the appraisee to complete an evaluation form to be used for quality assurance purposes
  - Evaluation form to be completed by appraisee and sent to the Primary Care Taskforce Administration Team