1. The Administration Team, following the criteria in the allocation process (see Allocation Process), complete the annual allocations.

2. 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.
   
   It is the responsibility of the appraiser to inform the Administration Team of the agreed date, to include for reporting figures to the commissioning organisations.
   
   If the Administration Team are not notified of a date for an appraisal, by 4 weeks before the appraisal due date, and the appraiser confirms that no date has been set, a reminder will be sent.
   
   If there is no response within two weeks of this first reminder, and again the appraiser confirms that no date has been set, a final reminder letter will be sent by Royal Mail Recorded Delivery to the appraisee’s recorded address by the Administration Team.
   
   If there is no response to this recorded delivery letter within the stated period then Administration Team will advise the commissioning organisation that there is an issue with the appraisee engaging with Appraisal Service.
   
   The appraiser should, if possible, try at least 3 times via 2 different routes (i.e. email, telephone, mobile) to make contact with an appraisee. If this is unsuccessful, the appraiser should not continue to try excessively to contact the appraisee, but should feedback to the Administration Team that there is an issue, as soon as possible, so that contact details can be checked and alternative routes pursued (e.g. via the practice manager).
   
   The method being used (i.e. paper DoH forms, SCHIN toolkit, RCGP etc) to record the appraisal should be notified to Administration Team prior to use so that the allocation can be made on-line where appropriate.

3. The appraisee should organise their paperwork prior to the appraisal:
   
   The Forms 1 – 3, previous year’s PDP, Summary of Discussion and supporting documentation are to be provided for the appraiser by the appraisee. The documentation should normally be received by the appraiser 2 weeks prior to the appraisal, to allow adequate time for preparation.
   
   Any alteration to this two week period should be mutually agreed between appraiser and appraisee.
THE APPRAISAL PROCESS AFTER ALLOCATION

If the appraiser has not received the documentation required for the appraisal with adequate time to prepare, the appraiser should postpone the appraisal date (see Cancellations/ Postponement process).

4. The appraiser and appraisee complete the appraisal discussion:
   It is the responsibility of the appraiser to complete Form 4/ Summary of Discussion.
   It is the responsibility of the appraisee to complete their PDP.
   Form 4/ Summary of Discussion and PDP should be agreed and signed off by both appraiser and appraisee.

5. All paperwork can be downloaded from:
   http://www.wessexdeanery.nhs.uk/gp_primary_care/appraisal_service/resources_and_information/useful_appraisal_formsinfo.aspx

6. The Form 4/Summary of Discussion/ PDP/ Invoice should be sent to the Administration Team within 4 weeks of the appraisal taking place:
   It is the responsibility of the appraiser to deal with the completed forms.
   Any appraisal for which the documentation has not been received within 4 weeks of the appraisal discussion will be recorded as late return.
   Any appraisal for which the documentation has not been received within 4 weeks of the end of the appraisal year i.e. by 28th April annually, will be reported as incomplete.
   On receipt of the properly completed Form 4/ Summary of Discussion, PDP and invoice, the Administration Team will sign off the invoice and send to be processed.

7. The appraiser should be paid within 30 days of the invoice being submitted to SBS, although this is outside the control of the appraisal service.

8. The Appraisee Evaluation Form:
   The Administrative Team will send the link to the online evaluation form to the appraisee via email.
   It is the responsibility of the appraisee to complete an evaluation form to be used for quality assurance purposes.
The appraisal process after allocation

Evaluation forms once completed by appraisee will generate a notification to the Administration Team.

On a monthly basis the evaluations will be considered and shared within the team, so that timely action can be taken if there is any relevant feedback or learning point for the appraisal and revalidation service.