



Abingdon Learning Trust

Principles into Practice - Teacher Appraisal Guidance



Part 1 An introduction to our approach to Teacher Appraisal

1. Introduction to the Updated Teacher Appraisal Guidance

The recent update to the [teacher appraisal guidance for schools](#), announced alongside the approval of pay for teachers and school leaders, marks a shift in approach. The emphasis is on a supportive, developmental appraisal process that values openness and fairness and ongoing dialogue around professional development. This guidance document has been developed for use across all ALT schools and should be read in conjunction with the ALT Policy for Appraising Teacher Performance and the ALT Teachers' Pay Policy.

The new guidance also underlines the need to make the appraisal process less bureaucratic and more focused on encouraging and validating a ***“teacher’s commitment to professional development, pedagogical excellence, and effective performance”***.

1.1 Key Changes in the Teacher Appraisal Process

The government’s [new guidance for managing teachers’ and leaders’ pay](#), announcing that from the 2024/25 academic year, schools will no longer be required to implement performance-related pay (PRP) policies that has allowed for a more development-focused appraisal process.

1.1.1 Positive Outcomes for Schools

1. **Reduction of High-Stakes Culture:** Linking teacher pay to performance criteria based on numerical data targets has often led to increased stress, and discouraged creativity and collaboration. A lower-stakes approach can help create a more supportive environment, contributing to better teacher job satisfaction and retention.
2. **A supportive and developmental process:** The appraisals process should be intrinsically supportive and developmental, conducted within a school culture that values openness and fairness. Appraisal should be a non-bureaucratic process that recognises, encourages and validates a teacher’s commitment to professional development, pedagogical excellence and effective performance. It should offer a supportive and safe environment where individual teachers and their line managers can have open and honest conversations about successes and areas for improvement.
3. **Focus on Professional Development:** The new guidance encourages schools to prioritise ongoing professional development, which is crucial for strategic school improvement. Teachers need support to excel in their roles and understand their contribution to the school’s goals. It should also address the support that will be provided to enable all teachers to achieve their objectives and continue to meet the teacher’s standards.



4. Reducing unnecessary workload should be at the forefront of any considerations around implementing appraisal processes.

1.1.2 Measuring Teacher Performance Based on Development

Schools need a robust appraisal process that allows school leaders to evaluate teachers' skills and identify development areas. The Department for Education (DfE) offers helpful points for schools transitioning to this approach:

DfE Criteria	What does this mean for our schools
Aspirational Objectives: Set achievable objectives based on success criteria within teachers' control – this is a move away from numerical targets and a move towards objectives that relate to a teachers own professional development.	• Focus on Teachers' Standards. • Objectives linked to professional growth. • Ongoing professional dialogue. • Professional development central to objectives.
Ongoing Informal Feedback: Provide continuous feedback throughout the appraisal cycle on performance and development areas.	Informal feedback is crucial for developmental appraisals, allowing for non-judgemental, ongoing conversations about progress. These discussions help keep objectives agile and ensure they remain relevant and achievable. Over the coming academic year, we will be working to develop and then embed instructional coaching as a vital part of our professional learning strategy in order to provide structure to support professional dialogue and professional development. The Education Endowment Foundation (EEF) defines instructional coaching as; <i>"Instructional coaching: experts working with teachers to discuss classroom practice on a one-to-one, regular, and sustained basis. Experts may observe the teacher in action, before encouraging focused practice of specific teaching skills."</i> (EEF, 2021). The Ambition Institute will be leading on the training for the initial cohort of Instructional Coaches in September 2025 and we will be working with schools to explore how we can roll out this training from January 2026. This approach will cement our commitment to professional dialogue, learning with and from others about what makes teaching become great teaching front and centre to our strategy. Over the next two years we



	expect the principles of instructional coaching to be an integral part of professional learning offer across all schools to support improvement and practice. Across this year we are developing a team of Teacher Educators (TEDs) in each of our schools who will work with senior leaders on teacher development activity in their school context – providing excellent learning opportunities that reflects the best practice based on educational research. We support our TEDs to collaborate through a termly network, providing opportunities to engage in the latest research. Additionally, we provide training for new or aspiring TEDs.
Proportionate Policies: Use readily available evidence from day-to-day practices to inform appraisal decisions. then assist them with reflecting on their own performance and professional learning.	Quality Assurance is a vital element of the teacher and staff appraisal cycle in schools. It supports ongoing school improvement by identifying areas for development, both at an individual and organisational level. Informing CPD strategy is central to quality assurance practice. Quality assurance in our schools is a collaborative process of peer review, designed to innovate, ensure that our pupils' experiences are of the highest quality and are designed to provide on-going feedback to staff which feed into our appraisal processes and professional learning opportunities. The Teacher's Standards are front and centre of our QA. All our schools will share with their teams the metrics/documentation that is used as part of the school's regular quality assurance practices like lesson visits and instructional coaching into their routines, providing focused feedback without creating additional stress. Recording and sharing feedback with teachers/appraisees helps maintain an open and fair process and supports the achievement of appraisal objectives.

Online platform to support appraisal The DfE recommends schools should consider using online solutions to streamline appraisal processes and reduce teacher workload.	As a Trust we have decided to use the National College platform People Development (formerly BlueSky) to support appraisal and professional development. This will enable Trust schools to: • Maintain a shared record of all conversations around appraisal and professional development, supporting an open and fair culture. • Support the identification of professional learning needs across the workforce and offer targeted training and development. • Document all quality assurance activities so that feedback can be shared with appraisees and triangulated with development objectives. • Offer a personal portfolio for all staff that empowers them to sustain their professional growth and helps leaders track the impact on school priorities.
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1.2 Effective Appraisal – Our Principles

1.2.1 Across all our schools we will ensure that our appraisal processes promote professional growth and development by

- Adopting a coaching model to support professional reflection and learning
- Prioritising developmental feedback – regular informal feedback and on-going conversations around performance
- Using a variety of evaluation methods to support developmental feedback including lesson observation, peer support, professional learning reflections, work scrutiny
- Providing clarity around what good practice looks like in each of our schools – a shared understanding of excellence in teaching and learning that has been exemplified so staff can recognise and use the framework to reflect on their own practice against this.
- Publishing the school's quality assurance processes and tools used to audit practice across the school and the outcomes from any QA activity enabling leaders to be clear about areas of excellence and those school's developmental priorities.
- Creating appraisal objectives that focus on professional development and will work towards their own and the school's improvement priorities.

1.2.2 The Appraisal Process – A Brief Overview

Appraisal Meeting

Reflections and discussions with your appraiser around your own practice which are informed by the Teachers' Standards, objective setting that is developmental and reflects career aspirations and explores and agrees your selected professional learning activities.

Effective Self Evaluation

Your own analysis of your professional practice, findings from school QA activity and constructive feedback will inform your discussions with your line manager and build up your evidence base that will feed into the appraisal cycle.

Appraisal Process

Implementation of your Professional Learning Activity (CPD)

You will have identified your PLA with your appraiser as part of your appraisal discussions selecting the most appropriate development activity that best reflects your needs identification and career aspirations.

This is **your** activity – developed by you to support your professional growth and career aspirations as well as a way of recording your ongoing evaluation of your learning and impact on your professional practice.

Ongoing Professional Dialogue

Rather than just one or two stand-alone appraisal meetings a year there will also be ongoing professional dialogue with your line manager that focuses on constructive feedback after observation for example or QA activity that will highlight strengths and areas that might require further development.

Part 2 The Practicalities

2.1 Roles and responsibilities through the Appraisal Meeting (actions highlighted in purple)

	Appraisee	Appraiser
Before the appraisal meeting See Appendix 1 for more detail	Reflections <i>Looking back over the review period you might want to think about or capture for the meeting:</i> 1. What's gone well this year and why. New skills / knowledge / TL strategies / Impact of CPD? What have you learned about yourself and how you work? If you have additional responsibilities (TLR post holder for example) you will need to reflect on how this element of your work has progressed. 2. How has your job changed since your last planning and review meeting? If it has changed, how have you adapted in response? 3. Have you achieved the objectives set? How do you know? Evidence you might want to share. Where objectives have been achieved, what do you think helped you to achieve them? Where objectives have not been fully achieved, what prevented you from completing them? 4. Reflect on the Teachers' Standards – which of these are an area of strength, which are you consolidating, and which would you like to develop further. Note the DFE in its appraisal Guidance July 2024 notes that 'teacher performance will be assessed against the relevant standards to a level that is	<i>Make sure that you are fully prepared for the planning and review meeting, and you:</i> ✓ Have reflected on the appraisee's last appraisal statement and their professional growth over the last year. ✓ Have reflected on the appraisee's wider roles if the appraisee has additional responsibilities ✓ Have a good understanding of their areas of strength and possible areas for development that is informed by the Teachers' Standards. ✓ Have reflected on wellbeing and workload issues that might have arisen over the year ✓ Understand the Trust's Appraisal policy ✓ Have copies of all the relevant documents to hand (e.g. job description, Faculty/subject/SIP priorities) ✓ Are clear about of the resources available to support development both within and beyond the school. <i>Review your appraisee's assessment against the Teachers' Standards on people.nationalcollege.com.</i> <i>Consider the draft objectives posted by your appraisee on their page of people.nationalcollege.com – what are your reflections/ideas/suggestions?</i>

	<i>consistent with what should be reasonably expected of a teacher in the relevant role and at the relevant stage of their career’.</i> <i>Complete the online audit tool to support discussion on people.nationalcollege.com (see appendix 2)</i> 5. Using your reflections think about possible objectives for the coming year. <i>Draft out your possible objectives on your people.nationalcollege.com page (see appendix 2)</i> 6. Reflect on your career aspirations, wellbeing and workload	
During the meeting	Be prepared to share your reflections on: ▪ Your work over the last year – what’s gone well and where you might have experienced some challenge or difficulty ▪ Your progress towards your objectives and how you have assessed your progress ▪ Your reflections on the Teachers’ Standards ▪ To share and discuss desired objectives focused on your reflections and ▪ How you want to develop professionally making reference to the learning opportunities you’d like to access <i>Record agreed objectives, success criteria and any relevant milestones onto your objectives page within 10 days of the meeting or complete during the meeting</i>	▪ Listen and engage in professional dialogue in essence this will involve you focussing on understanding what’s being shared, asking clarifying questions and paraphrasing and summarising back what you heard to confirm understanding. ▪ You may or may not agree with all that is shared – you need to be clear and unambiguous in the points you are making. <i>Remember though – there should be no surprises in any message being shared.</i> ▪ Enable the appraisee to lead on the development of their objectives and the professional learning they would like. ▪ Agree the evidence that would indicate progress towards the successful completion of the professional learning objectives. This should also include outcomes from school QA activities.

		<i>Agree an overall statement about the appraisees performance and write up on the appraisee's Appraisal Meeting Record (see Appendix 2 part C).</i>
Post the meeting	Engage in professional learning activity over the cycle Participate in ongoing coaching and professional dialogue throughout the cycle Record outcomes on our appraisal platform should you wish	<i>Sign off the objectives on people.nationalcollege.com</i> Plan for ongoing dialogue throughout the cycle for example a coaching conversation/discussion might take place following QA activity for example outcomes from a work scrutiny

2.2 The Appraisal Meeting Overview (see Appendix 1 for detailed guidance on the appraisal meeting itself)

The appraisal Meeting itself has two distinct parts – the first is **looking back** at professional progress and development over the previous academic year and the second part – **looking forward** is focussed on planning for the new appraisal cycle.

(a) Review of the previous year – looking back....

- Discussion of key accomplishments and factors that have helped and/or perhaps hindered achievements.
- Learning and development across the last year, training and its impact – explore career aspirations, wellbeing and workload
- Review of each of your objectives - exceeded/met/partially met/not met?
- Review of the appraisees audit against Teachers' Standards (this is completed electronically on people.nationalcollege)
- Overall summary to be written up – this is completed on people.nationalcollege.com and is called the Annual Appraisal Statement on the appraisees Appraisal Report.

(b) Planning for the new appraisal cycle – looking forward

- *Objective setting* - Objectives should reflect the discussions around professional growth in the 'looking back' section of the meeting.
- *Professional Learning Activity (CPD)* - You will discuss the training needs throughout your discussion of each objective.

2.3 Developing objectives focused on professional growth

In line with best practice objectives for the new appraisal cycle will be led by the appraisee (these are described on people.nationalcollege.com as appraisee led objectives). It is recommended that there are no more than **three objectives** for the new appraisal cycle.

Objectives identified might

(a) reflect a colleague's *own reflections* on their own professional practice linked to their assessment against the Teachers' Standards

or

(b) reflect *whole school priorities* – your school will provide clarity and guidance for you on these priorities

or

(c) reflect your *career aspirations* – we would expect only one of the objectives to be carer related.

2.3.1 Appraisal Objectives

The example objective below reflects the fields that will need to be completed on people.nationalcollege.com platform.

- **Actions** – these should indicate the activity you plan to engage in as your work towards the objective.
- **Success Criteria** – what will be the impact of the activity on my professional practice.
- **Support/professional learning (CPD) activities** – All colleagues across the Trust have access to the National College which supplies a wide range of courses, training materials and podcasts. In addition, you might want to select one of the opportunities from the Trust's menu of professional development opportunities.

The example objectives below show a wide range of professional learning activities you might engage in in order to support your work against a particular objective.

However, professional learning isn't just about courses and training modules – you could look to work with experts/colleagues from your own school or setting to support your development. This could be through observing a colleague with a specific skills set for your own



development – for example you might have identified a colleague who has had success in developing adaptations for his/her pupils. Meeting with the teacher exploring what they do and how they do it, observing their work and inviting them into your own classroom to feedback on your teaching would provide significant support and guidance.

As part of your appraisal discussion, you will identify an appropriate range of CPD/professional learning opportunities in discussion with your appraiser. If you wish you can record these on our appraisal platform. This will assist in supporting your reflections and your progress against your objectives.

- **Intended evidence and impact** – at the outset it's vital to reflect on what evidence you can usefully use to demonstrate that you have made progress in meeting each of your objectives when it comes to the appraisal review. The example below provides examples of the sort of evidence you might want to use to demonstrate impact.

Your school will provide you with more exemplar objectives to support your own thinking around how you might want to structure your own objectives. The example objective below is for illustrative purposes.

2.3.2 Example Objective Imagine a scenario in which a school recognises that questioning has significant impact on oracy development and influence the quality of writing across KS3. In this instance the teacher has recognised that this is an area they would like to work on through their own self-reflection and in conversation with their appraiser.

The objective might look like the example below. It is incremental with clear milestones (actions) so it lends itself to catch up conversations/ongoing professional dialogue. The progress towards the objective can be seen as documents are uploaded throughout the appraisal cycle. This objective might suit post ECT teacher. Objectives should be developed that reflect career stage.



Objective	Actions (milestones)	Success Criteria	Support/Professional development	Intended evidence and impact
Develop my use of questioning to support oracy and use of vocabulary in (particular class year group)	Explore with Type, range of questioning in the classroom and review evidence of impact of these. Identify strategies to use in own practice	Understand latest research on use of questioning in classroom (EEF) and isolate strategies I want to work on	National College Modules EEF research Time with ... to plan peer observation and review questioning in my classroom Time for to visit my classroom, observe practice and provide feedback	Professional Discussions Records of observation Quality of writing through work scrutiny Impact assessment summary Data collected as part of routine school QA
	Book in number of peer observation opportunities with to learn from the observations and share what I've learnt with ... and how I plan to embed strategies into own practice	Recognise how and when different techniques are appropriate and how I might use them in my classroom setting		
	Team teach with To review my practice	Lead on use of questioning when working with		
	Invite Into series of my lessons for developmental feedback	Awareness of areas for development to be addressed		
	Embed learning into practice	Evidence of impact noted through series of lesson visits by HoF		

Career Development Objective

Objective	Actions (milestones)	Success Criteria	Support/Professional development	Intended Supporting evidence and impact
	Apply to be a school-based TEd and complete training	Successfully complete the Instructional coaching course		



Develop knowledge and skills to become and effective ECT Mentor	Apply for Mentor training role (OTSA programme)	Compete Mentor programme	Instructional coaching course	Successful completion of accredited courses.
	Shadow current school based ECT Mentor to gain insight into role and ECT Induction Tutor	Use experience to learn about the practicalities of both roles and their different roles and responsibilities in ECT development	Funding for Mentor programme Time with experienced ECT Mentor and Induction Tutor	Professional learning reflections
	Apply for school based ECT Mentor role			

2.4 Ongoing professional dialogue

At the heart of our appraisal practice is the prioritisation of developmental feedback and on-going conversations around performance that utilises findings from the various QA activities your school undertakes to support developmental feedback including but not limited to lesson observation, peer support, professional learning reflections, work scrutiny. All of our schools will provide clarity around what good practice looks like in each of our schools – a shared understanding of excellence in teaching and learning that has been exemplified so staff can recognise and use the framework to reflect on their own practice against this.

2.5 Post the Appraisal Meeting – ensuring appraisal is effective.

Leaders have a responsibility to ensure that teachers are appraised in accordance with the Trust's agreed appraisal process and will have mechanisms at individual school level to quality assure the process through discussions with selected individuals from different areas or teams. In addition, Leaders will also carry out moderation activity to ensure there is equitability in terms of appraisal outcomes and objectives.

2.6 Moving the Upper Pay Range (UPR)

All qualified teachers can apply to be paid on the UPR and applications will be assessed in line with the Trust's Teachers' Pay Policy. The process for moving to the UPR can be found in section 7 of the policy.



Appendix 1 Appraisal – How to Guide

Introduction

Records relating to appraisal are all kept on the people.nationalcollege.com website. The appraiser will create the record of the meeting. Actions are identified in bold. In order to be as productive as possible in the meeting as we use this software for the first time it's imperative that both the appraiser and appraisee have refreshed their understanding of the software. Appraisees might want to have written up their suggested objectives prior to the meeting in draft form so they are easier to discuss and upload (if written up in word) if that is an easier option.

Step 1: The arrangements

Appraisal should be conducted in a setting that ensures privacy and allows sufficient time for a thorough discussion.

The appraiser should book in the meeting time with their appraisees and secure a suitable and private meeting space. The meeting should be around 1 hour.

Step 2: Preparation before the annual appraisal assessment meeting

Prior to the appraisal meeting both appraiser and appraisee should reflect on

- (a) Successes/achievements over the last review period
- (b) Progress towards objectives using appropriate evidence

As we haven't used people.nationalcollege.com to set objectives last year, **appraisees will need to complete the review template used by their school last year to note the extent to which they met their objective and any supporting evidence. This should be shared with your appraiser 24 hours in advance of your appraisal meeting.**

(c) performance against relevant teacher standards

- **Appraisee to use the Standards Reflection tool on people.nationalcollege.com.**

Select which of the four comments is best fit for each of the Teachers Standards. You can, should you wish to, attach evidence but there is **no** expectation that this is the case. This should be completed 24 hours before the appraisal meeting so your appraiser can see your assessment and be ready to discuss with you at the appraisal meeting.

- **Appraiser to familiarise themselves with their appraisees assessment.**

- (d) any factors which have impacted on effectiveness including training/development over the last year
- (e) review of current job description
- (f) identification of future key areas for objectives linked to job role and experience
- (g) future training and development needs
- (h) any career goals/aspirations

- (i) Reflecting on the above areas what might be potential areas for objectives for the new appraisal cycle? Appraisee might choose to write up these draft objectives ahead of the meeting (see Step3 (e) below).

Step 3: The review/planning meeting – agenda/overview

Part 1 – looking back

- (a) Discussion of successes, achievements and challenges over the preceding appraisal cycle.
- (b) **Review of objectives**– discussion to note key accomplishments and factors that have hindered or helped achievements - were objectives exceeded/met/not met?
 - Appraisee to talk through review of last year’s objectives
 - Appraiser to capture a statement around objective completion on the appraisal meeting template (called Appraisal Report) that can be found on your Manage Dashboard and clicking on *create meeting*.
- (c) **Employee development** – discuss the developmental progress since the last review and the training development opportunities that have occurred, it’s impact and future needs
- (d) **Teacher standards** – for the review teachers are assessed against the relevant teacher standards (see above). There should be a discussion using the Teachers Standards assessment completed by the appraisee.
 - An overall summary on the Appraisal Report completed to reflect the discussion and written up by the appraiser.

Part 2 looking forward

- (a) **Objective setting** – (see section 2.3 above) as part of the formal appraisal the appraiser and the appraisee will agree new/continuing objectives for the next review period linked to school priorities, job role and experience. These should be agreed and clearly defined so transparency about what success will look like, how progress will be measured and the evidence that will be used. Each objective should have
 - i. Objective description
 - ii. Date objective set and date for objective to be met
 - iii. Success criteria
 - iv. Actions you will undertake to work on the objective (brief)
 - v. Support and professional learning activity
 - vi. Intended supporting evidence and impact

- **Appraisees - Objectives should be written up on people.nationalcollege.com. You can do this prior to the meeting for discussion and then edit or amend post the meeting. Drafting out potential objectives prior to the meeting is a good use of times and will assist in stimulating discussion.**
 - **The appraiser should review the objectives set and approve using people.nationalcollege.com**
- (b) **Professional Learning activity discussion** - should take place as part of the discussion around each objective however there might also be additional activity that might be appropriate. Professional learning activity should be recorded using the CPD button on people.nationalcollege.com

Step 4: After the review/planning meeting - completion of the documentation

The appraiser should complete an appraisal report for their appraisee using the template Appraisal Report.

Your overall statement will be on people.nationalcollege.com and be a collection of the different elements of the appraisal (see DFE Teacher Appraisal guidance for Schools July 2024 page 16) but will include the following

- Progress against objectives for the appraisal period in question
- Assessment of the teacher's performance of their role and responsibilities against their objectives and the relevant standards
- Assessment of the teacher's professional development needs
- Details of discussion relating to career aspirations, wellbeing and workload

Appendix 2 Guides to using people.nationalcollege.com

There are four 'how to' guides in this appendix.

Guides for Appraisees	Guides for Appraiser
Performing your self-review using the Teacher's Standards	Appraiser Completing the Appraisal Meeting Record
Appraisee Setting self-led objectives	Appraiser Checking and Approving Objectives for those you line manage
Creating a CPD Record	

A. Appraisee - Performing your self-review using the Teacher's Standards

There are standards available at all levels, if your organisation has bespoke standards these can also be entered and reviewed against.

1. Go to your **dashboard** and Select **Standards** from the left-hand navigation menu
2. **Click on the title** to enter.
3. Standard Levels consist of 3 levels;

Dimension

Statement Set

Statements

The screenshot shows the 'Standards' page in the Insight Academy system. The left-hand navigation menu includes Dashboard, CPD, Objectives, Monitoring, Meetings, and Standards (highlighted with a star). The main content area is titled 'Standards' and 'Teacher - National Teachers' Standards (2012)'. It shows the visibility settings and an overview of responses. The 'Dimension' is 'Teaching: Set high expectations which inspire, motivate and challenge pupils (1)'. The 'Statement Sets' are 'Establish a safe and stimulating environment for pupils, rooted in mutual respect (1.1)', 'Set goals that stretch and challenge pupils of all backgrounds, abilities and dispositions (1.2)', and 'Demonstrate consistently the positive attitudes, values and behaviour which are expected of pupils (1.3)'. The 'Set Keys' are '1.1', '1.2', and '1.3'. The page also includes a 'Support' button and a 'View all levels' link.

4.

5. To access the statements, you can **click on the statement set keys** to navigate and jump through each dimension or to start, simply **click View** on the first statement set.

6. Here you will now see the **statements** within the selected dimension and statement set. There is a menu of tabs for different actions within the set. These are the self-review features.
7. Simply **mark each statement** with the response that best reflects your current performance or practice. It **saves automatically** as you perform the review, so if you choose the wrong response simply select the correct one. If you wish to remove the response altogether, just re-select the response already made and this will remove it.
8. Respond to all the statements within the set then either **use the keys to navigate** or click on the link 'Continue to next statement set'.
9. **Continue** responding to the statements until complete.
10. Once complete, you can view an **overview of your responses** which provides a graphical overview of your responses across the level, an opportunity to provide a summary comment and access to any evidence you have uploaded.
11. Depending on your responses, the analysis may also highlight any particular **Strengths or Areas for Development**.

B. Appraisee Setting self-led objectives

1. Select **Objectives*** from the left-side navigation menu.
2. In the right-side panel, you'll find filters for academic years along with objective status filters. By default, it will always show the current year and those which are **Incomplete** (in progress).
3. Click **Create Objective** in the top right corner.
4. Each objective has its own visibility setting. By default, it will always be set to **Visible** which enables your manager and your organisation's administrators to see them.
5. Once you've completed all the required and relevant fields press **Next Step**.
6. If your organisation has built an action or development plan you will have an opportunity to **link your objective to priorities** here, along with your standards self-review, if started.
7. Make any relevant selections then press **Save**.

C. Appraiser Completing the Appraisal Meeting Record

1. Navigate to your dashboard.
2. Click **manage** in the right-hand corner.
3. Under quick links select **create meeting**.
4. Select an individual from the drop-down list.
5. Under template **select Appraisal Report** and **click create**.
6. Complete the report using the drop-down menus and text boxes.



7. Click **save** meeting to check. (you might want to download a PDF version of the Appraisal Report for ease - **go to download PDF** from the **Actions** offered on the right hand of the page)
8. Mark as complete.
9. Navigate back to Appraisal in left hand drop down which will take your Appraisal and the page **Filter Meetings**.
10. **Select** the individual and then **select** their Appraisal Report.
11. Comments can be added to the Appraisal Report under the Notes section. Please complete this section – if there are no comments please say as such in the box. It would be good practice to note that the document was approved or not approved.
12. Once the Notes section completed select **edit from the right-hand** list of Actions and return to the relevant form and **mark as complete**.

D. Create a CPD Record

1. **Navigate** to your dashboard and **click create** CPD activity.
2. Complete all relevant fields.

E. Appraiser checking and approving objectives for those you appraise

1. **Navigate** to your dashboard and **click on the manage** tab in the top right-hand corner of the page
2. **Select** the relevant appraisee and check if there are any objectives to check and approve by looking at section entitled objectives.
3. **Select** approve and this will take you to the appraisee's objective that requires approval.
4. **Click** on the highlighted objective.
5. **Read and check** the objective.
6. **Go to** the actions menu on right hand menu.
7. **Click approve** if you approve.
8. If are not able to approve and would like an amendment – **complete the notes** box at the bottom.
9. Complete process with other objectives.

