Turas Appraisal Guide for Reviewers

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Welcome to TURAS Appraisal

Turas Appraisal is the replacement online recording and monitoring tool for e-KSF is now live.

The system is very intuitive and has guidance and useful resources embedded throughout. This guide had been developed to help you get started.

Help, support and advice using Turas Appraisal will be provided by the Learning and Education Support Team on the contact details below.

**L&E Support and Advice | Tel: 0141 278 2700 (Ext. 12700) choose option 3**

**Email: LE.Support@ggc.scot.nhs.uk**

[Image: HR Connect logo]
Using Turas Appraisal

Completing reviews on Turas Appraisal that were started on e-KSF:-

If previous KSF Reviews, PDPs and Objectives were started on e-KSF there is no need to duplicate on Turas Appraisal. However, to record that the review meeting has taken place the reviewee and/or the reviewer you should complete the three questions in the Discussion Summary and also complete the KSF Progress page if this was not recorded on e-KSF, then both reviewee and reviewer require to Confirm and Agree this. This will allow you to complete the previous PDP&R and start a new document for the following review period by clicking on the Current Appraisal button.

At the beginning of the review period:-

- Click on Current Appraisal button (all pages should be blank)
- Enter agreed PDP learning needs and activities to be undertaken
  
  If this is entered by reviewee this requires to be accepted by reviewer and if entered by reviewer requires to be accepted by the reviewee

- Enter agreed service/departmental objectives to be completed
  
  If this is entered by reviewee this requires to be accepted by reviewer and if entered by reviewer requires to be accepted by the reviewee

Throughout the review period or before end of year review meeting:-

- Update status of PDP when learning activities have been undertaken
- Update status of objectives
- Update KSF Progress in preparation for end of year review i.e. enter current levels and enter comments on how you applied what you have learned by undertaking the agreed learning activities to your job.
  
  If this is entered by reviewee this requires to be accepted by reviewer and if entered by reviewer requires to be accepted by the reviewee

At the end of review period:-

- Complete the three questions in the Discussion Summary
- Confirm and agree

  This will sign off full document including PDP, Objectives, KSF Progress and Discussion Summary. Once confirmed and agreed no changes can be made. You will now be able to start a new document for next review by clicking on Current Appraisal and start off the process above again.
Recording a Personal Development Plan on Turas Appraisal - Reviewer

Guidance

This page allows you to record the Personal Development Plan for your Reviewee. This helps you plan the learning they will need to undertake in the year ahead. This is agreed with your reviewee during your Personal Development Planning discussion.

You need to first of all add their Learning Need(s) and then the relevant Learning Activities that will help them be met.

What is a Learning Need?

Your Reviewee’s learning needs (sometimes called learning objectives) will have been agreed at their personal development review discussion and will be included in their Personal Development Plan. The learning need describes what new knowledge or skills they need to develop to meet their continuing job requirements, objectives or KSF post outline.

To achieve their learning need you will need to add at least one learning activity to support their development.

More Information

You member of staff may have a new learning need because of:

- A new piece of equipment that you require to use as part of your job
- A new computer system that you require to use
- A new policy or procedure that you need to follow
- New or changed forms/paperwork that you have to complete
- A move to new premises e.g. ward, office or base with changed health and safety procedures to be followed in the case of an emergency
- A need to work to the full KSF outline levels for your job
- New skills to help you achieve your objectives

Add Learning Need

Click on Add Learning Need - On create Learning Need page:-

1. Input learning need e.g. to update knowledge on Fire Safety awareness
2. Choose priority from drop down list:-
   - Mandatory
   - Essential to role
   - Desirable for organisation
   - Desirable for individual
3. Choose the KSF Dimensions in the post outline that this learning need is related to. If dimension not in current post outline then click on the More dimensions link to choose from there
4. Click on submit and you will be asked to confirm Submit Form

Note – A learning need can be deleted if not yet agreed by both reviewer and member of staff by clicking on Actions under learning need and choose Delete.
Learning Activities

Once a learning need is recorded you will be able to record the activity/activities that your member of staff is going to undertake in relation to the leaning need.

Guidance

Learning activities will help your Reviewee meet their learning need. These will help them gain the new knowledge and skills needed or just update their existing skills. Learning activities could be ‘on the job’ learning or sometimes they may need to be formal ‘off the job’ learning.

More Information

Some examples of the learning activities that they may undertake are:

- Learning from user manuals, guides and instruction leaflets
- Learning from DVDs, books and demonstration & lectures
- Learning from someone else who already does what you need to learn
- Learning from e-learning modules
- Learning from tutor lead activities delivered by Learning & Education Advisors, Practice Development professionals, Practice Education Facilitators etc.
- Learning from job rotation and shadowing

Other examples of ‘off the job’ learning examples may include:

- Learning from secondments
- Learning from formal education courses
- Learning from networking events
- Learning from ‘off the job’ instructor lead/classroom events

Add Learning Activity

1. Click on Add Activity button
2. Enter details of Learning Activity e.g. undertake Fire Safety elearning module
3. Enter comments under How will this activity meet this leaning need
4. Click Submit

Updating Learning Activity Status

Once the activity has been added a + will appear beside the Learning Need details. This will show a drop down list for all activities recorded under the Learning Need. To update the status of a Learning Activity:

- Click on Actions drop down list under the heading Learning Activity Actions. Choose Update and you can chose from one of the following options:
  - In progress (automatic)
  - Completed
  - No longer relevant
Objectives are clear statements that set out what they want to achieve at work. You will agree them with your Reviewee during their Personal Development Planning & Review discussion, if needed for their post.

They help to ensure that what we do at work is in line with the priorities that their team, department or organisation wants to achieve. Objectives help them to be clear about what is expected of them and what matters to them in their job. They help make the most of their skills and abilities and can support them to gain more experience to help with their career aspirations. Your Reviewee should have no more than 6 objectives.

More Information
When writing their objectives, you might want to think about:

- How can they make best use of their skills and abilities to make improvements to the services they deliver?
- Are they ready to take on additional responsibilities in their present job? If so – what might that involve and what would their contribution be?
- Would they like to gain further experience in other related areas of work? If so – what?

Adding an objective

Click Add an objective - On Create an objective page:

1. Complete the section - What is your SMART objective?

Guidance - How do I write a SMART objective?

Objectives should be SMART. This stands for Specific, Measurable, Achievable, Relevant and Timebound. This page on Turas Appraisal has a short film that shows you how to make their objectives SMART.

2. Complete the section - How will you achieve your objective?

3. Complete the section - How will you measure your objective?

4. Choose the KSF Dimensions in the post outline that this objective is related to. If dimension not in current post outline then click on the More dimensions link to choose from there

5. Click on submit and you will be asked to confirm Submit Form

Updating an objective

On the objectives page click on the Actions drop down list for the objective that you want to update and click Update. You will be able to update status and comments on this page.
Guidance

This page allows you to record your Reviewee’s progress against their KSF post outline.

You are able to set the levels for each dimension – you will need to agree these with your reviewee.

You can also record any comments against each dimension to show how they have met this level.

The comments should only include the difference or improvements they have made since their last review.

There is no need to copy and paste lots of information from previous years.

To view the reviewee’s KSF Post Outline details:-

Click on Display Post Outline Details – this will show the full and foundation levels of the post outline. You can print or download the post outline by clicking on the relevant button.

To set current levels and/or add comments on your reviewee’s progress on the dimension:-

Click on Set Current Levels – for each dimension choose current level from drop down list

Or

For each dimension click on Actions drop down list and choose Update.

Level Details

Each dimension has a link below it to show the details of each of the four levels relevant to that dimension.

Further information on adding comments:-

Comments should include information on the improvements your Reviewee has made since their last review. What did they learn and how has that learning helped to improve how they do their job.

You do not need to cut and paste a lot of information. A short summary will do.

You can find out more information about dimensions by clicking on the link provided on each dimension which will take you to the KSF website.

Click Update to save the information you have recorded or click Update & Go To Next to save and move on to next dimension.
Recording the Discussion Summary on Turas Appraisal - Reviewer

The discussion summary is required to be completed prior to the final **Confirm and Agree** page can be completed. It summarises the appraisal year.

**Guidance**

This page allows you to record a short summary from your personal development review discussion with your reviewee.

The main points of your discussion should include:

- What went well
- What might have been better
- What you want to do differently next time. This might include improvements you want to make.

Please note that you will not be able to complete the Confirm & Agree (sign off) page unless all three questions below are answered by you and/or your reviewee.

**Find out more - This page on Turas Appraisal has a very helpful short video on Effective Personal Development Planning and Review**

To input your comments to this page:-

1. Click **Update Comments**

2. Enter your comments in:-
   - **What has gone well this year?**
   - **What might have gone better?**
   - **What difference do I want I want to make next year?**

3. Click **Update**
**Confirm and Agree**

This is the final stage of completing the annual review.

No information can be added to the to the **Current Appraisal** document once the **Confirm and Agree** page has been completed therefore you should check that all information is complete on:-

- PDP
- Objectives
- KSF Progress
- Discussion Summary

Please note that when information is added to the PDP, Objectives or KSF Progress pages there is no need to sign them off on the **Confirm and Agree** page, each of these pages have an **Accept Changes** button that should be used when anything is added.

**Accepting changes on PDP, Objectives and KSF Progress pages**

If information is entered by reviewee this requires to be accepted by reviewer and if it is entered by reviewer requires to be accepted by the reviewee. The system will prompt you to do this as and when information is added and will also prompt you to do this on the **Confirm and Agree** page if it’s not already been done.
Complete on paper

On your reviewer page when you open a new **Current Appraisal** document you will see an additional tab titled **Complete on Paper**. This will only appear on the reviewer’s page and not on the reviewee’s page.

This tab will remain there until the **reviewee** inputs information from their own Turas Appraisal account or you enter information for them and they accept the changes from their own account. It allows those without access to PCs to complete the process on paper however if using this option the paper document has to be signed by both reviewer and reviewee and uploaded to Turas Appraisal as an attachment.

**Please note** - Completing on paper will not give a record or report on any Personal Development Planning & Review information the paper document is just filed on the system as an attachment.
Appendix 1

Turas Appraisal

Paper Template

NHS Greater Glasgow and Clyde

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Discussion Summary

What has gone well this year?

Reviewee Comments:

Reviewer Comments:

What might have gone better?

Reviewee Comments:

Reviewer Comments:

What difference do I want to make next year?

Reviewee Comments:

Reviewer Comments:
## PDP

**Priority** – Mandatory, Essential to role, Desirable for organisation, Desirable for individual  
**Actions** – View, Update, Delete

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