Simple guide to RMS

Key points:

* RMS was designed in Yorkshire and is used throughout NHS England to record and manage appraisals and revalidation.
* RMS can be a bit slow at times so be prepared to wait after clicking ‘save’!
* The GP appraisals South West team view and manage appraisals, including allocating them at the start (and during) the appraisal year, and arranging payments.
* Your key tasks are to set appraisal dates, then later upload the completed appraisal file, and complete the appraisal output summary (all three described below).
* You will be allocated a username and initial password which can be simply changed using the “change password” at the top right of the initial screen. This password will need to change every 90 days.

Your RMS

When you log in, this shows the basic tabs you use. ‘My record’ and ‘My appraisals’ are about you, but doctors who are not appraisers cannot log in to RMS at present, so these areas are seldom updated or used. You can look at past years using the yearly tabs.

Revalidation summary shows your personal revalidation position.

‘Acting as appraiser’ is the tab you will mainly use when logging in, so click on that.

Navigating to appraisee record

Under your name, the blue line shows years, defaulting to the present year, but you can move forward and back to review past appraisals (and future allocations) by clicking on each year.

Below this it says “Appraiser performance form”. This gives data on your performance for the current year, so may be blank in June for example. This can be used by your senior appraiser when they review with you at the end of the year. They may upload the summary of your review meeting here, or next to your appraisal upload lower down, so check both.

The main section shows your appraisals and the columns are arranged thus;

1. Appraisal month allocated by the team. This is not fixed in RMS and you can insert dates outside that month.
2. Appraisal status. This will initially say “no appraisal date provided” but will change to “awaiting documentation” when you insert the date (see below). Once you upload the appraisal, the team will check it is correctly completed and change this to “approved” and then “submitted” for payment at which stage you should get paid (via RMS mid-monthly payment run)!
3. Appraisal date will be blank until inserted by you. See below.
4. The next three columns doctor’s name, designated body, and appraisal type (doctor) are self-explanatory and won’t change.
5. Next is revalidation date which you can click on to see that doctor’s revalidation summary. The date will change from blue to purple when you access it. This page is a useful overview of their present (and past) revalidation cycles, and shows green for completed sections on the output summary each year, and red for items not completed (such as MSF and PSQ). Approved missed appraisals show as a single green line. There may be up to three of these in a cycle, if maternity, illness and covid have conspired, but if three or less in a complete cycle, consult your SA. The tiny purple triangle in the corner denotes free text notes, just hover and these will show up.
6. Finally, QA shows the Progress2 form, when the appraisal upload is checked by the team this changes to blue, when your senior appraiser scores and comments on that appraisal the score is shown below the words Progress 2, and it changes to purple when you click on and view the QA comments.

Now click on a doctor’s name. This takes you to their summary page. Below the basic summary see “Appraisal details” and click on that. The only field in the next screen you need to use is the appraisal date. Click on the blank box and a calendar comes up. Click on the date and save. The date can be changed later if necessary.

When you’ve completed the appraisal and agreed the summary with your appraisee, you need to click on the doctor’s name again to reach this screen. Near the bottom you’ll see “upload a document”. Please remember that the MAG form needs to be ‘locked’ and Clarity, Fourteen Fish and GP Tools signed off as ‘completed’ before you upload to RMS. Click on this, browse your computer and upload the complete appraisal you have downloaded from the toolkit. Then delete the file from your computer.

You can also upload other documents, such as PSQ, MSF, or appraisals in other roles, if these are not included in the main toolkit portfolio. Please note that these are required for revalidation readiness and therefore should be visible for review by your SA and the admin team.

Next you need to click on the “appraisal output summary” (AOS) at top left. This must be completed for each appraisal. Just a few pointers to completion;

* The CPD credits box no longer needs a number inserted. If you agree a number with the doctor this can be inserted, or agree to leave it blank. If blank, ensure your notes assure the team that the doctor is keeping up to date in all their roles.
* When completing SEA (or significant untoward incidents as they are now called) and complaints, you must answer 'yes', yes means you have discussed it, not that there has necessarily been a SUI or complaint. Then write “no SUIs” or similar in notes box.
* If you answer yes to PSQ or MSF, you will need to insert the date of completion in the box below, if it has been completed since the last appraisal. If known and before the previous appraisal, record the date last completed in the free text notes section next to the word MSF or PSQ so have this handy.
* If you know surveys have to be carried out or has been included in PDP, again, note in the AOS free text notes. This is really helpful to Senior and Admin teams when doing revalidation checks.
* Complete the free text notes box in brief where possible to help the appraisal team and your senior appraiser; this summary is their first port of call when checking an appraisal. Each note generates the small purple triangle you saw in the revalidation summary.
* It is useful to use the notes box under ‘scope of work’ to describe their roles
* Usually we will agree all five MAG statements, but if you disagree one, please discuss with your senior appraiser first.
* If due to revalidate in the next year, write “revalidation ready” (if they are!) in the notes next to MAG 5
* Please let your senior appraiser know if you have a “revalidation ready” appraisal completed so they can check.
* Once completed, save, but ensure you have done all you need to do first.
* Appraisal upload should be completed within 28 days of a completed appraisal
* If there are any reasons for delay, i.e. difficulty with sign off, please let the admin team know
* Any reasons which may prevent completion of appraisal for revalidation readiness will need to go to the monthly Revalidation Advisory Group (RAG) meetings, so early flag to appraisal team would be appreciated.

Once the upload and output summary are done, the admin team will be notified via daily RMS notification reports and check the appraisal for completeness, as above.

The only other thing to note is that as time goes by, for QA you may want to click on your blue progress forms and appraiser performance form before completing the annual review with your senior appraiser.

Hope that helps. Any questions ask your senior appraiser or the appraisals team.

RLW 11/6/21