

Turas Appraisal

How to:-

Record PDP&R information - Staff



Staff page and functionality

From your “My Appraisals” section on your Turas Appraisal home page you will be able to:-

- View, update and accept PDP learning needs and activities
- View, update and accept objectives
- View, update current dimension levels and comments in the KSF progress
- View and update the discussion summary
- Sign off as complete

Accessing your own appraisals (reviews)

The screenshot displays the NHS TURAS Appraisal interface. At the top left is the NHS Education for Scotland logo. The main header reads "TURAS Appraisal" with a sub-header: "Turas Appraisal is the application for recording the appraisal information of Health and Care staff across Scotland." The interface is divided into two main sections: "My Appraisals" and "Team Tasks".

My Appraisals (highlighted with a red oval) contains the following information:

- Learning and Education Advisor / Corporate / Learning and Education
- Line manager: Ishbel Whitters
- Reviewer: Ishbel Whitters
- Sub department:
- Health board: NHS Greater Glasgow and Clyde

At the bottom of the "My Appraisals" section, there are two buttons: "Current Appraisal" (highlighted with a red oval) and "Previous Appraisals". A red callout box with the text "Click here to access your current appraisal" has an arrow pointing to the "Current Appraisal" button.

Team Tasks (highlighted with a light blue background) contains the following information:

- My Reviewees
- View all team members that I review or check my reviewee's progress.
- Two buttons: "My Reviewees" and "Reviewee Progress" (highlighted with a blue border).

At the bottom of the "Team Tasks" section, there is a heading for "My Team".

The appraisal home page

Current Appraisal Employment Details

Dougal MacKenzie (Learning and Education Administrator Local / Central / Acute / Partnership / Corporate / Learning and Education)

Home > Current Appraisal

Each element of the PDP&R process has a separate tab

Discussion Summary | PDP | Objectives | KSF Progress | Confirm & Agree

Each tab has useful guidance notes. This one includes guidance on completing the page and a short video with some hints and tips

> Guidance

Actions: [Update comments](#)

What has gone well this year?

Helpdesk

The screenshot shows a web interface for a 'Current Appraisal'. At the top, there's a blue header with the title 'Current Appraisal' and a user profile for 'Dougal MacKenzie'. A breadcrumb trail shows 'Home > Current Appraisal'. Below this is a row of five tabs: 'Discussion Summary', 'PDP', 'Objectives', 'KSF Progress', and 'Confirm & Agree'. A red box with arrows pointing to each tab contains the text 'Each element of the PDP&R process has a separate tab'. Below the tabs is a 'Guidance' section with a right-pointing arrow and a red box containing the text 'Each tab has useful guidance notes. This one includes guidance on completing the page and a short video with some hints and tips'. Below the guidance is an 'Actions' section with a blue button labeled 'Update comments'. At the bottom, there's a text input field with the placeholder 'What has gone well this year?'. On the right side, there's a vertical green 'Helpdesk' button.

What to record and when

Step 1 - 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 in the **year ahead**
- 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 in the **year ahead**
- 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

What to record and when

Step 2 -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.



What to record and when

Step 3 - At the end of review period:-

- Complete the three questions in the **Discussion Summary** (this is what was discussed at your meeting)
- **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.

Please note:-

Following your end of year review meeting when the information recorded has been confirmed and agreed, the appraisal will become the **Previous Appraisal** and a new **Current Appraisal** document will appear for you to start again from **Step 1**

The Personal Development Plan (PDP)

Adding a Learning Need

Discussion Summary **PDP** Objectives KSF Progress Confirm & Agree

▼ 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.

Actions: [Add Learning Need](#) [Update Learning Activity Statuses](#)

Learning Need	Learning Activities	Accepted	Actions
+ To complete fire safety elearning module	1	Add Activity	Yes Actions ▼

PDP Documents

No file chosen

The Personal Development Plan (PDP)

Adding a Learning Need

Create Learning Need

Add Learning Need here

Learning Need *

To be able to use Turas Appraisal to record my PDP&R information

Guidance notes

 What is a Learning Need?

Priority

Select priority from dropdown list

Desirable For Organisation

KSF Post Outline Dimensions

- C1 - COMMUNICATION
- C2 - PERSONAL AND PEOPLE DEVELOPMENT
- C3 - HEALTH, SAFETY AND SECURITY
- C4 - SERVICE IMPROVEMENT
- C5 - QUALITY
- C6 - EQUALITY AND DIVERSITY
- G1 - LEARNING AND DEVELOPMENT
- G5 - SERVICES AND PROJECT MANAGEMENT
- IK1 - INFORMATION PROCESSING

Select the dimension(s) that the Learning Need relates to

[> View more Dimensions](#)

Once completed click on the submit button

Submit

Cancel

The Personal Development Plan (PDP)

Adding a Learning Need

The screenshot shows a web interface for creating a learning need. A modal dialog box is open, asking for confirmation to submit. A red callout box points to the 'Submit Form' button in the dialog.

Create Learning Need

You will be asked to confirm that you want to submit

Are you sure you want to Submit?

Submit Form Cancel

To be able to use Turas Appraisal to record my PDP&R information

What is a Learning Need?

Priority

Desirable For Organisation

KSF Post Outline Dimensions

- C1 - COMMUNICATION
- C2 - PERSONAL AND PEOPLE DEVELOPMENT
- C3 - HEALTH, SAFETY AND SECURITY
- C4 - SERVICE IMPROVEMENT
- C5 - QUALITY
- C6 - EQUALITY AND DIVERSITY
- G1 - LEARNING AND DEVELOPMENT
- G5 - SERVICES AND PROJECT MANAGEMENT
- IK1 - INFORMATION PROCESSING

[View more Dimensions](#)

Submit Cancel

The Personal Development Plan (PDP)

Adding a Learning Activity

Discussion Summary **PDP** Objectives KSF Progress Confirm & Agree

Status: Pending (items requires acceptance by Dougal MacKenzie [More information](#))

> Guidance

Actions: **Add Learning Need** **Update Learning Activity Statuses**

Learning Need	Learning Activities	Accepted	Actions
+ To complete fire safety elearning module	1	Yes	Actions ▾
To be able to use Turas Appraisal to record my PDP&R information	0	Pending - Added	Actions ▾ View Update Delete

To add the Learning Activity to be undertaken to meet the Learning Need click on the "Add Activity" button

Select Action to be taken

Choose file No file chosen

Upload

The Personal Development Plan (PDP)

Adding a Learning Activity

Create Learning Activity

Learning Need

To be able to use Turas Appraisal to record my PDP&R information

Learning Activity *

Add Learning Activity here

Use guidance and resources on HR Connect to learn how to use application

[What is a Learning Activity?](#)

Guidance

How will this activity meet this learning need?

Empty text area for describing how the activity meets the learning need.

Insert Target Completion date

Target completion date

31/10/2020

Once completed click on submit button

Submit

Cancel

The Personal Development Plan (PDP)

Adding a Learning Activity

Discussion Summary **PDP** Objectives KSF Progress Confirm & Agree

Status: Pending (items requires acceptance by Dougal MacKenzie [More information](#))

> Guidance

Actions: [Add Learning Need](#) [Update Learning Activity Statuses](#)

Learning Need	Learning Activities	Accepted	Actions
+ To complete fire safety elearning module	1	Add Activity Yes	Actions ▾
+ To be able to use Turas Appraisal to record my PDP&R information	1 (1 Activity Updated)	Add Activity Pending - Added	Actions ▾

The activity added now required to be accepted.
In this example the reviewer has added the activity therefore the member of staff is required to accept it.
If the member of staff inputs the information, the reviewer is required to accept it.

The Personal Development Plan (PDP)

Updating the status of a Learning Activity

Actions: [Add Learning Need](#) [Update Learning Activity Statuses](#) Click here to update the status of the Learning Activity

Learning Need	Learning Activities	Accepted	Actions	
+ To complete fire safety elearning module	1	Add Activity	Yes	Actions ▼
- To be able to use Turas Appraisal to record my PDP&R information	1 (1 Activity Updated)	Add Activity	Pending - Added	Actions ▼

Learning Activity	Accepted	Learning Activity Actions
Use guidance and resources on HR Connect to learn how to use application	Pending - Added	Actions ▼

PDP Documents

[Choose file](#) No file chosen [Upload](#)

The Personal Development Plan (PDP)

Updating the status of a Learning Activity

Summary Status Learning Activity

Learning need: To complete fire safety elearning module

Activity	Status
To successfully complete the Fire Safety module on LearnPro	Completed

Learning need: To be able to use Turas Appraisal to record my PDP&R information

Activity	Status
Use guidance and resources on HR Connect to learn how to use application	In Progress

Select the option from the dropdown list to update the status of the Learning Activity

To save updates click on the Submit button

Submit

Cancel

Objectives

Adding an Objective

Discussion Summary PDP **Objectives** KSF Progress Confirm & Agree

> Guidance **Click here for Guidance on how to write a SMART Objective**

Actions: **Add an Objective** **Click here to add an Objective**

Objective	Status	Accepted	Actions
This is where I will input my SMART Objective	In Progress	Yes	Actions ▾

Objectives Documents

Choose file No file chosen Upload

Objectives

Adding an Objective

Create Objective

What is your SMART objective? *

Enter details of Objective

Enter your objective here

 How do I write an objective?

Click here for guidance

How will you achieve your objective?

How will you measure your objective?

Target completion date

31/12/2020



Enter target completion date

Objectives

Adding an Objective

KSF Post Outline Dimensions

- C1 - COMMUNICATION
- C2 - PERSONAL AND PEOPLE DEVELOPMENT
- C3 - HEALTH, SAFETY AND SECURITY
- C4 - SERVICE IMPROVEMENT
- C5 - QUALITY
- C6 - EQUALITY AND DIVERSITY
- G1 - LEARNING AND DEVELOPMENT
- G5 - SERVICES AND PROJECT MANAGEMENT
- IK1 - INFORMATION PROCESSING

Select the dimensions that the Objective relates to

> View more Dimensions

To save Objective, click on Submit button.

You will be asked to confirm if you are sure you want to submit

Submit

Cancel

Are you sure you want to Submit?

×

Submit Form

Cancel

Objectives

Updating the status of an objective

Discussion Summary PDP **Objectives** KSF Progress Confirm & Agree

In this example one of the objectives was input by the reviewer and therefore requires the member of staff to "accept" this

⚠ Pending(items requires acceptance by Dougal MacKenzie [More information](#))

> Guidance **Guidance notes**

Actions: **Add an Objective**

To update the status of an Objective e.g. to change the status from "in progress" to "completed", click on the actions button and select "update"

Objective	Status	Accepted	Actions
This is where I will input my SMART Objective	In Progress	Yes	Actions ▾
Enter your objective here	In Progress	Pending - Added	View Update Delete

Supporting documents can be uploaded if required

Objectives Documents

Choose file No file chosen Upload

Objectives

Updating the status of an objective

The screenshot shows a user interface for updating an objective. It includes a 'Status' dropdown menu currently set to 'In Progress', a 'Review Comments' section with a 'Comment' text area, and three buttons: 'Update', 'Update & Go To Next', and 'Cancel'. A modal dialog box is open at the bottom, asking 'Are you sure you want to Update?' with 'Confirm Update' and 'Cancel' buttons. Red arrows and text boxes provide instructions: one points to the status dropdown with the text 'After clicking "update" select the status of the objective from the drop down list'; another points to the comment area with 'Add comments and click on "update" to save or click on "update & go to next" if you want to update next objective'; and a third points to the 'Update' button with 'You will be asked to confirm update'.

Status: In Progress

Review Comments

Comment

Update Update & Go To Next Cancel

Are you sure you want to Update?

Confirm Update Cancel

After clicking "update" select the status of the objective from the drop down list

Add comments and click on "update" to save or click on "update & go to next" if you want to update next objective

You will be asked to confirm update

KSF Progress

Updating current levels

Discussion Summary PDP Objectives **KSF Progress** Confirm & Agree

> Guidance **Guidance Notes** **View KSF Post Outline for this employment**

Actions: **Set current levels** **Display Post Outline Details**

Dimension		Foundation Level	Full Outline Level	Current Level	Comments	Actions
C1 - COMMUNICATION	Level Details ⓘ	2	2		-	Actions ▼
C2 - PERSONAL AND PEOPLE DEVELOPMENT	Level Details ⓘ	1	2		-	Actions ▼
C3 - HEALTH, SAFETY AND SECURITY	Level Details ⓘ	1	1		-	Actions ▼
C4 - SERVICE IMPROVEMENT	Level Details ⓘ	1	1		-	Actions ▼
C5 - QUALITY	Level Details ⓘ	1	2		-	Actions ▼

Click on "set current levels" to enter current level that the reviewer and the member of staff agree that the member of staff is working at

KSF Progress

Updating current levels

Update KSF Post Outline Dimension Levels

Dougal MacKenzie (Learning and Education Administrator Local / Central / Acute / Partnership / Corporate / Learning and Education)

Employment Details

Home > My Reviewees > Current Appraisal > Update KSF Post Outline Dimension Levels

Update KSF Post Outline Dimension Levels

Select current level 1-4 from drop down list for each dimension

Dimension	Foundation Level	Full Outline Level	Current Level
C1 - COMMUNICATION Level Details ⓘ	2	2	<input type="text"/>
C2 - PERSONAL AND PEOPLE DEVELOPMENT Level Details ⓘ	1	2	<input type="text"/>
C3 - HEALTH, SAFETY AND SECURITY Level Details ⓘ	1	1	<input type="text"/>
C4 - SERVICE IMPROVEMENT Level Details ⓘ	1	1	<input type="text"/>

KSF Progress

Updating current levels

C5 - QUALITY	Level Details ⓘ	1	2	2 - Maintain quality in own work and encourage others to do so
C6 - EQUALITY AND DIVERSITY	Level Details ⓘ	1	1	1 - Act in ways that support equality and value diversity
G1 - LEARNING AND DEVELOPMENT	Level Details ⓘ	1	1	1 - Assist with learning and development activities
G5 - SERVICES AND PROJECT MANAGEMENT	Level Details ⓘ	1	1	1 - Assist with the organisation of services and/or projects
IK1 - INFORMATION PROCESSING	Level Details ⓘ	2	2	2 - Modify, structure, maintain and present data and information

Select current level 1-4 from drop down list for each dimension

Click on "update" and then "confirm update" to save

Update

Cancel

Are you sure you want to Update?

Confirm Update

Cancel

KSF Progress

Updating comments/evidence

Discussion Summary PDP Objectives **KSF Progress** Confirm & Agree

> Guidance

Actions: [Set current levels](#) [Display Post Outline Details](#)

To add comments/evidence to dimensions, click on the "actions2" button and then click on "update"

Dimension		Foundation Level	Full Outline Level	Current Level	Comments	Actions
C1 - COMMUNICATION	Level Details ⓘ	2	2	2	-	Actions ▾
C2 - PERSONAL AND PEOPLE DEVELOPMENT	Level Details ⓘ	1	2	2	-	Update
C3 - HEALTH, SAFETY AND SECURITY	Level Details ⓘ	1	1	1	-	View
C4 - SERVICE IMPROVEMENT	Level Details ⓘ	1	1	1	-	Actions ▾

KSF Progress

Updating comments/evidence

Update KSF Post Outline Dimension

Dimension Name

C1 - COMMUNICATION

[Level Details](#)

Click on "level details" to view descriptions for levels 1-4

Current level

2 - Communicate with a range of people on a range of matters

Comment

This is where you would add your comments

Add comments here

When complete, click on "update" to save or "update & go to next" to save and go to next dimension

[Further Information](#)

Guidance notes

Update

Update & Go To Next

Cancel

KSF Progress

Updating comments/evidence

Discussion Summary PDP Objectives **KSF Progress** Confirm & Agree

> Guidance

Actions: [Set current levels](#) [Display Post Outline Details](#)

When comments have been added to a dimension a "view" icon will appear and when clicked on will display the comments without clicking into each dimension. It will also show the name of the person that input the comments i.e. name of reviewer and/or member of staff

Dimension	Foundation Level	Full Outline Level	Current Level	Comments	Actions
C1 - COMMUNICATION	Level Details ⓘ 2	2	2	View ⓘ	Actions ▾

Claire Randall

This is where you would add your comments

Discussion Summary

Update comments

Discussion Summary PDP Objectives KSF Progress Confirm & Agree

> Guidance **Guidance notes**

Actions: **Update comments** Click "update comments" to add comments to each of the 3 discussion summary questions

What has gone well this year?

Dougal MacKenzie	No comments added
Reviewer Comments	No comments added

Any comments added will be visible next the name of who input them i.e. name of member of staff or name of reviewer

What might have gone better?

Dougal MacKenzie	No comments added
Reviewer Comments	No comments added

Discussion Summary

Update comments

> Guidance **Guidance notes**

Actions: **Update comments**

Click "update comments" to add comments to each of the 3 discussion summary questions. To save comments in each of the 3 questions, click on the "update" button and then "confirm update" button

What has gone well this year?

Dougal MacKenzie	No comments added
Reviewer Comments	No comments added

Any comments added will be visible next the name of who input them i.e. name of member of staff or name of reviewer

What might have gone better?

Dougal MacKenzie	No comments added
Reviewer Comments	No comments added

Confirm and agree

Discussion Summary

PDP

Objectives

KSF Progress

Confirm & Agree

IMPORTANT MESSAGE!!

i You should **only** Confirm and Agree at the end of your appraisal period as you will not be able to make any further changes after this is done.
This page is where you **Confirm** that your appraisal discussion has taken place and that you **Agree** to the content that has been added to this appraisal document.

! **PDP** - 3 learning needs in personal development plan. Requires acceptance by Claire Randall

[Go to PDP](#)

Actions: [View & Print Appraisal](#)

Reviewer

You can view and/or print the full appraisal by clicking here

It is not possible for you to confirm and agree this appraisal as there are processes outstanding. The details are shown above.

Confirm and Agree

Any outstanding actions will appear in a yellow banner on the "confirm and agree" page with a button that will take you the page that requires action.
The "confirm and agree buttons" will be shaded out until the outstanding action has been completed.

Reviewee (if Dougal MacKenzie is with you they can click on the buttons below to also confirm and agree by entering their password).

It is not possible for you to confirm and agree your appraisal as there are processes outstanding. The details are shown above.

Reviewee Sign In

Confirm and Agree

Confirm and agree

Discussion Summary

PDP

Objectives

KSF Progress

Confirm & Agree

i You should **only** Confirm and Agree at the end of your appraisal period as you will not be able to make any further changes after this is done.
This page is where you **Confirm** that your appraisal discussion has taken place and that you **Agree** to the content that has been added to this appraisal document.

When all outstanding actions have been completed the "Confirm and Agree" buttons will become live and bold.

If both the reviewer and member of staff are together they can both sign off on same page. The member of staff will require their own user name and password to do this.

This can also be signed of remotely at different times

Actions:

View & Print Appraisal

Reviewer

It is not possible for you to confirm and agree this appraisal as there are processes outstanding. The details are shown above.

Confirm and Agree

Reviewee

Reviewee (if Dougal MacKenzie is with you they can click on the buttons below to also confirm and agree by entering their password).

It is not possible for you to confirm and agree your appraisal as there are processes outstanding. The details are shown above.

Reviewee Sign In

Confirm and Agree

Confirm and agree

Current Appraisal

Dougal MacKenzie (Learning and Education Administrator Local / Central / Acute / Partnership / Corporate / Learning and Education)

Employment Details

Home > My Reviewees > Current Appraisal

Confirmation that the appraisal has been confirmed and agreed

Appraisal Confirmed and Agreed

 This appraisal is now confirmed and agreed.

Actions:

[View Completed Appraisal](#)

[My Team](#)

[Home](#)