

**Appraiser assurance review template**

**1.3 Using this template**

It is good practice for the senior appraiser (or appraisal lead) to hold a periodic assurance review meeting with individual appraisers. This template is intended to guide this process and provide a record of the meeting for the appraiser and the appraisal office.

Whilst initially designed to support an assurance review meeting between an appraiser and their senior appraiser, this template can also be used alone by an appraiser as a self-review tool, or by an appraiser and a fellow appraiser as a peer-facilitated review tool, in a networking or buddying context.

The intended procedure is as follows:

1. The reviewer or appraisal office part-populates the template, and prepares the appraiser’s audit of appraisal outputs, doctor feedback and any other relevant information, as available.
2. The appraiser completes remaining items in Section A.
3. The appraiser and reviewer hold the review meeting, structured along the lines of the information in the template.
4. The appraiser and reviewer agree the content of Section B, and complete the sign-off in Section C.
5. The appraiser and the appraisal office each retain a copy of the final template.

Note: Appraisers who are themselves licenced medical practitioners should present a copy of the completed template at their own medical appraisal, as supporting information indicating their participation in effective governance processes in relation to their appraisal work.

## 1.4 Section A

Appraiser’s name: Click here to enter text.

Reviewer’s name: Click here to enter text.

Reviewer’s role: Click here to enter text.

Date of review meeting: Click here to enter a date.

**1.4.1. General**

Specialty: Click here to enter text.

Other roles: Click here to enter text.

Start date as appraiser: Click here to enter text.

Have you signed a contract/consultancy agreement? Choose an item.

Date of signature of contract/consultancy agreement: Click here to enter text.

Number of appraisals in the last year: Click here to enter text.

Number of appraisals you would like to do next year: Click here to enter text.

Scope of appraisal work (e.g. primary care, secondary care, private, responsible officer appraisals): Click here to enter text.

## Review of appraisal work in the last year

**1.4.2 Headlines**

*Looking at your last review’s development themes/objectives in relation to your role as appraiser, to what extent did you get to fulfil these?*

Click here to enter text.

*As an appraiser, what do you consider you did well in the last year?*

Click here to enter text.

*What is your approach to preparation and appraisal summaries completion?*

Click here to enter text.

*What difficulties/ barriers have you come across as an appraiser?*

Click here to enter text.

*How well does your appraisal work fit in with your other professional duties?*

Click here to enter text.

*Do you have any helpful tips/good practice to share?*

Click here to enter text.

*Do you have any suggestions for appraisal workshop topics?*

Click here to enter text.

*How would you like your appraisal work to develop?*

Click here to enter text.

**1.4.3 CPD for your appraisal work**

Local appraiser groups/appraiser network meetings attended: Click here to enter text.

*Comments on these, and any other CPD activities you have undertaken in relation to your appraisal work; possible development plans:*

Click here to enter text.

**1.4.4. Quality improvement activity for your appraisal work**

(Appraisal office should provide the audit of appraisal summaries and PDPs if available)

*Comments on the audit of your appraisal summaries and PDPs and any other quality improvement activity relating to your appraisal work; possible development plans:*

Click here to enter text.

**1.4.5 Significant events in your appraisal work**

(Consider, for example, unexpected concerns, interrupted appraisal, failure to agree outputs with doctor)

*Comments; possible development plans:*

Click here to enter text.

**1.4.6. Maintaining professional relationships with doctors you have appraised**

(Appraisal office to provide doctor feedback if available,)

*Comments* *on doctor feedback provided by the appraisal office and any other feedback from the doctors you have appraised; possible development plans:*

Click here to enter text.

**1.4.7 Maintaining professional relationships with colleagues in your appraisal work**

*Comments; possible development plans:*

Click here to enter text.

**1.4.8 Your health in relation to your appraisal work**

*Comments; possible development plans:*

Click here to enter text.

**1.4.9 Maintaining probity in relation to your appraisal work**

(Consider, for example, identification of conflict of interest or appearance of bias with doctors you are asked to appraise, delivering a professional appraisal through diligent preparation and personal organisation.)

*Comments, possible development plans:*

Click here to enter text.

**1.4.10 Complaints and compliments in relation to your appraisal work**

(Appraisal office to provide information about complaints if available)

*Comments; possible development plans:*

Click here to enter text.

**1.4.11 Any other comments before the discussion**

Reviewer: Click here to enter text.

Appraiser: Click here to enter text.

## 1.5 Section B

**1.5.1 Comments/summary following discussion**

Reviewer: Click here to enter text.

Appraiser: Click here to enter text.

**Personal development themes for your appraisal work**

Click here to enter text.

**Actions by reviewer/appraisal office**

|  |
| --- |
| Click here to enter text. |

## 1.6 Section C

**1.6.1 Sign-off**

We agree that the above is an accurate summary of the review discussion and agreed personal development themes/actions.

Signatures: May be agreed by e-mail if both parties consent, in which case names sufficient:

Click here to enter text.

Date of sign-off: Click here to enter a date.

The NHS Commissioning Board (NHS CB) was established on 1 October 2012 as an executive non-departmental public body. Since 1 April 2013, the NHS Commissioning Board has used the name NHS England for operational purposes.