## NHS England logoAppendix B: Generic medical in-post review template

**Using this template**

It is good practice for the person with clinical governance responsibility for a doctor in a particular role to hold a periodic review meeting with the doctor. This template is intended to guide this process and provide a record of the meeting for the doctor and their engaging organisation. It is intended for use where a suitable in-post review process does not already exist.

When considering whether to use this template to review a role which a doctor is undertaking, a balance needs to be struck between the need to provide assurance of fitness to undertake a role, based primarily on the level of risk associated with the role, and the burden of documentation on the doctor. For roles with very low associated risk, it may be acceptable to present a less structured form of review in that role to be agreed between the doctor and their responsible officer, for example by way of a comment in the scope of work section of the doctor’s appraisal form. The periodicity of the agreed level of review might also be the subject of discussion and agreement between the doctor and their responsible officer, again depending on the nature of the role and its associated level of risk.

Whilst primarily designed to support a review meeting between a doctor and the person with clinical governance responsibility for their work, this template can also be used alone by a doctor as a self-review tool, or by doctor and a colleague as a peer-facilitated review tool, in a networking or buddying context.

The intended procedure is as follows:

1. The reviewer or organisation part-populates the template, and prepares any organisationally-generated records of CPD, quality improvement activity, feedback, complaints/compliments and any other relevant information relating to the doctor, as available.
2. The doctor completes remaining items in Section A.
3. The doctor and reviewer hold the review meeting, structured along the lines of the information in the template.
4. The doctor and reviewer agree the content of Section B, and complete the sign-off in Section C.
5. The doctor and the organisation each retain a copy of the final template.

Note: The doctor 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 the role being reviewed.

**Organisational Logo**

Click here to enter text.

**Section A**

Doctor’s name: Click here to enter text.

Doctor’s GMC number: Click here to enter text.

Reviewer’s name (enter ‘None’ if self-review): Click here to enter text.

Reviewer’s role: Click here to enter text.

Date of review: Click here to enter a date.

**General**

What role does this review relate to:

Click here to enter text.

Start date in this role:

Click here to enter text.

Have you signed a contract?

Choose an item.

Date of signature of contract:

Click here to enter text.

Other professional roles that you have:

Click here to enter text.

**Headlines**

Description of this role and the work you have undertaken in the last year:

Click here to enter text.

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

Click here to enter text.

What do you consider you did well in the last year?

Click here to enter text.

What difficulties/ barriers have you come across?

Click here to enter text.

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

Click here to enter text.

How would you like your work in this role to develop?

Click here to enter text.

**CPD in relation to this role**

(If your organisation arranges any CPD activities for you in relation to this role, you should describe these here)

Comments on CPD arranged by your organisation, and any other CPD activities you have undertaken that are relevant to this role; possible development plans:

Click here to enter text.

**Quality improvement activity in relation to this role**

(Your organisation should provide relevant data if available)

Comments on data provided by your organisation and any other quality improvement activity relating to this role; possible development plans:

Click here to enter text.

**Significant events in relation to this role**

(Your organisation may define with you what might constitute a significant event in the context of your role)

Comments; possible development plans:

Click here to enter text.

**Maintaining professional relationships with those you deliver this service to**

(Engaging organisation to provide feedback if available)

Comments on feedback provided by the organisation and any other feedback from those you deliver the service to; possible development plans:

Click here to enter text.

**Maintaining professional relationships with colleagues in relation to this role**

Comments; possible development plans:

Click here to enter text.

**Your health in relation to this role**

Comments; possible development plans:

Click here to enter text.

**Maintaining probity in relation to this role**

(Your organisation may define with you what might constitute suitable probity considerations in the context of your role)

Comments; possible development plans:

Click here to enter text.

**Complaints and compliments in relation to this role**

(Engaging organisation to provide information about complaints if available)

Comments; possible development plans:

Click here to enter text.

**Any other comments before the discussion**

Reviewer: Click here to enter text.

Doctor: Click here to enter text.

**Section B**

**Comments/summary following discussion, or self-reflection comments by doctor**

Reviewer: Click here to enter text.

Doctor: Click here to enter text.

**Personal development themes in relation to this role**

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

**Actions by reviewer**

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

**Section C**

**Sign-off**

We/I confirm that the above is an accurate summary of the review process and personal development themes/actions.

Signature (if required):

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.

*This form has been extracted from, and should be used in accordance with, the NHS England Improving the Inputs to Medical Appraisal document, April 2016, Annex B: Generic medical in-post review template, available here:* [*https://www.england.nhs.uk/revalidation/appraisers/improving-the-inputs-to-medical-appraisal/*](https://www.england.nhs.uk/revalidation/appraisers/improving-the-inputs-to-medical-appraisal/)

*High quality care for all, now and for future generations.*