

# LEAP Appraisal – Manager/Appraiser User Guide

June 2018

## How to view your staff members' detailed appraisal records, if you are a manager.

The first section of this guide explains the processes for viewing and updating an appraisal where you are the appraisee's manager. The process if you are identified as the appraisee's appraiser is very similar and is covered specifically at the end of this guide.

1. Once logged into LEAP, hover over the 'Reports' tab at the top of the page and then select the 'My Team's Appraisals' option.

The screenshot displays the LEAP Learning Education Appraisal Platform interface. At the top left, the logo reads 'LEAP Learning Education Appraisal Platform'. To the right, it says 'King's College Hospital NHS Foundation Trust'. The navigation bar includes 'Home', 'My Learning', 'Team', 'Reports', and 'Catalogue'. The 'Reports' dropdown menu is open, showing 'Admin Dashboard' and 'My Team's Appraisals'. Below the navigation, there are three status cards: '0% Expired' (with a red warning icon), '1% Due' (with a yellow warning icon), and '1% Compliant' (with a green checkmark icon). A table header shows 'Topic', 'Status', and 'Link'. Below this are four main content cards: 'Course Catalogue' (blue), 'Appraisal' (green), 'My Learning Calendar' (orange), and 'My Dashboard' (purple), each with a 'View' button. On the right side, there is a 'Logged in user' section for 'Liam Herbert [Think]' with an 'Edit avatar' button, and a 'Choose Manager' section showing 'Your current manager is Michael Burley [Think]' and a 'Choose new manager' button.

- This will then bring up all appraisals, initially displaying **your own** appraisal records on the “My Appraisals” tab.

Next, select the ‘As Manager’ tab to the right of ‘My Appraisals’

LEAP Learning Education Appraisal Platform

King's College Hospital NHS Foundation Trust

Home My Learning Team Reports Catalogue Search

Admin Dashboard My Team's Appraisals

Welcome Liam Log out

Administration

Site administration

Search in settings Go

### All Appraisals

MY APPRAISALS AS MANAGER

Search by

Name contains

Status is any value Complete

Search Clear

Appraisal Form	Form Started	Form Completed	Form Status
My Appraisal	5 Mar 2018		Incomplete
My Appraisal	14 Mar 2018	16 Mar 2018	Complete

- This will then display all **your team's** appraisals, complete or incomplete, which have been started.

Welcome Liam Log out

Administration

Site administration

Search in settings Go

### All Appraisals

MY APPRAISALS AS MANAGER

Search by

Name contains

Status is any value Complete

User's Fullname contains

Search Clear

Team Member	Appraisal Form	Form Started	Form Completed	Appraisal Date	Appraisal Performance Rating	Form Status
Michael Burley [Think]	My Appraisal	5 Apr 2018	12 Apr 2018	19 Apr 2018	Outstanding	Complete
Michael Burley [Think]	My Appraisal	12 Apr 2018		19 Apr 2018	Outstanding	Incomplete
test lh	My Appraisal	4 May 2018	4 May 2018	1 May 2018	Outstanding	Complete
test lh	My Appraisal	4 May 2018	4 May 2018	1 May 2018	Outstanding	Complete

If your staff member has more than one completed appraisal listed, this is due to them opening more than one appraisal form. LEAP takes the date of the most recent form for reporting purposes.

Note that once an appraisee submits their form with date and performance rating, LEAP saves this record as a “complete” form, and at the same times opens a new form for them to record their objectives. This is saved as an “incomplete” form on LEAP. Thus your appraisees will usually have at least two forms listed under the My Team Appraisals tab.

If you don't see a form for one of your members of staff, it's likely that they either haven't yet started an appraisal, or have not selected you as their line manager/appraiser. You need to ask them to log in to LEAP, go to their appraisal page and click “Start My Appraisal”

Clicking on the headings will allow you to sort the table on the previous page into date or alphabetical order. If you would like to reverse the sort e.g. from A-Z to Z-A just click on the heading again.



4. Once you have chosen which appraisal form to view, select it by clicking the blue “My Appraisal” text in the relevant row. A confirmation screen will appear as shown below.

You can either:

Click “Download PDF” to get a downloadable and printable version of all the information in the appraisal, entered by the appraisee....

...or click the ‘View’ button to continue to view information on screen.

You are viewing test lh's appraisal.

### My Appraisal

Job assignment linked to this workflow:  
• appraisaltest

My Appraisal

[Download PDF](#)

[View](#)

5. Clicking "View" will show your staff member's appraisal and their answers. You can click the tabs on the left of the page to view different pages of the appraisal (if any exist).

Enter your most recent end of year (appraisal) conversation date



**Learner's**  
answer

26 Mar 2018

What is your overall rating for this appraisal period, as agreed with your appraiser?



**Learner's**  
answer

Outstanding

Are there any files you want to upload before clicking the Finalise Appraisal button below?



**Learner's**  
answer

[File](#)

### Notes

You can record any additional notes here.

**Add note**

If the appraisee has uploaded files to the appraisal document, then you can download and view them from this page by clicking on the file name, example shown in the red box in the screenshot above.

6. You can also write notes on your staff members appraisals (both previous and current) by using the notes text box at the bottom of any of the appraisal pages.

### Notes

You can record any additional notes here.

Add note

Save note

7. Click Save note to post your comment onto the appraisal

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Thank you for completing your appraisal

Michael Burley [Think] **Manager** 16 May 2018 11:21

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## How to update a staff member's appraisal record

1. Once logged into LEAP, hover over the 'Reports' tab at the top of the page and then select the 'My Team's Appraisals' option.

The screenshot displays the LEAP Learning Education Appraisal Platform interface. At the top left, the logo reads "LEAP Learning Education Appraisal Platform". On the top right, it says "King's College Hospital NHS Foundation Trust". The navigation menu includes "Home", "My Learning", "Team", "Reports", and "Catalogue". The "Reports" dropdown menu is open, showing "Admin Dashboard" and "My Team's Appraisals" (highlighted with a red box). Below the navigation, there are three status cards: "0% Expired" (with a red warning icon), "1% Due" (with a yellow warning icon), and "1% Compliant" (with a green checkmark icon). A table header shows "Topic", "Status", and "Link". Below this are four main dashboard cards: "Course Catalogue" (blue), "Appraisal" (green), "My Learning Calendar" (orange), and "My Dashboard" (purple), each with a "View" button. On the right side, there is a user profile section for "Liam Herbert [Think]" with an "Edit avatar" button and a "Choose Manager" section showing the current manager as "Michael Burley [Think]" and a "Choose new manager" button.

- This will then bring up all appraisals, initially displaying **your own** appraisal records.

Select the 'As Manager' tab next to 'My Appraisals'

The screenshot shows the LEAP Learning Education Appraisal Platform interface. The top navigation bar includes 'Home', 'My Learning', 'Team', 'Reports', and 'Catalogue'. The user is logged in as 'Liam'. The main content area is titled 'All Appraisals' and features two tabs: 'MY APPRAISALS' and 'AS MANAGER', with the latter highlighted by a red box. Below the tabs are search filters for 'Name' and 'Status'. The table below shows two appraisal records:

Appraisal Form	Form Started	Form Completed	Form Status
My Appraisal	5 Mar 2018		Incomplete
My Appraisal	14 Mar 2018	16 Mar 2018	Complete

- This will then display all **your team's** appraisals, complete or incomplete, which have been started.

The screenshot shows the LEAP Learning Education Appraisal Platform interface with the 'AS MANAGER' tab selected. The search filters are the same as in the previous screenshot. The table below shows four appraisal records for team members:

Team Member	Appraisal Form	Form Started	Form Completed	Appraisal Date	Appraisal Performance Rating	Form Status
Michael Burley [Think]	My Appraisal	5 Apr 2018	12 Apr 2018	19 Apr 2018	Outstanding	Complete
Michael Burley [Think]	My Appraisal	12 Apr 2018		19 Apr 2018	Outstanding	Incomplete
test lh	My Appraisal	4 May 2018	4 May 2018	1 May 2018	Outstanding	Complete
test lh	My Appraisal	4 May 2018	4 May 2018	1 May 2018	Outstanding	Complete

To override an appraisal, identify which team member you wish to view and select the appraisal form by clicking the blue “My Appraisal” text in the relevant row.

*Note that:*

- you can only override an appraisal which has a status of incomplete. If the appraisal is marked as complete the form is locked and the manager override will not appear
- If your staff member has more than one appraisal listed this is due to them opening more than one form.

4. Once you have chosen which appraisal to view, a confirmation screen will appear. Click the ‘View’ button shown below.

The screenshot displays the LEAP Learning Education Appraisal Platform interface. At the top left is the LEAP logo and the text 'Learning Education Appraisal Platform'. At the top right is the NHS King's College Hospital NHS Foundation Trust logo. Below the logos is a navigation bar with links for Home, My Learning, Team, Reports, and Catalogue, and a search bar. The main content area shows a user profile for 'Liam' with a 'Log out' button. Below this, it states 'You are viewing test lh's appraisal.' and 'My Appraisal'. Underneath, it says 'Job assignment linked to this workflow:' followed by a list item 'appraisaltest'. A table with one row is shown, containing the text 'My Appraisal' and a 'View' button. The 'View' button is highlighted with a red rectangular box.



5. Select 'Manager Override' on the tab as shown below.

The screenshot shows a web interface for managing appraisals. At the top right, it says 'Welcome Liam' and has a 'Log out' button. On the left, there is an 'Administration' sidebar with 'Site administration' and a search box. The main content area is titled 'My Appraisal' and includes a 'Download PDF' and 'Return' button. Below this is a navigation menu with options: OBJECTIVES, DEVELOPMENT, ONGOING REVIEWS, END OF YEAR, APPRAISER OVERRIDE, MANAGER OVERRIDE (highlighted with a red box), and RAPID APPRAISAL RECORD. The 'Objective' section contains instructions on recording objectives and a 'Learner's answer' section with a 'Not yet answered' status. At the bottom, there is a 'Notes' section with an 'Add note' button and a text input field.

6. This will lead you to the Override section. It will have three sections as shown overleaf:

- Manager-entered appraisal date - The date the appraisal took place
- Manager-entered performance rating – This will be one of 5 options shown below
- Why did the manager need to override appraisee answer? – This will be free text to explain the reasons why you have overridden the appraisal

Once the form is filled in, select Finalise Appraisal at the bottom of the page.

**Administration**

▸ Site administration

Search in settings

- OBJECTIVES
- DEVELOPMENT
- ONGOING REVIEWS
- END OF YEAR
- APPRAISER OVERRIDE
- MANAGER OVERRIDE
- RAPID APPRAISAL RECORD

You are viewing test lh's appraisal.

My Appraisal
[Download PDF](#) [Return](#)

This page is only visible to the appraisee's line manager. Information entered here will override the appraisee's information on the "summary" page and will then be used in LEAP reports.

Manager-entered appraisal (end of year conversation) date (Entered date must be after 01/01/2018)

Your answer

Manager-entered performance rating

Your answer

- Outstanding
- Good
- Acceptable
- Developing
- Needs improvement

Notes - why did the manager need to override appraisee answer?

Your answer

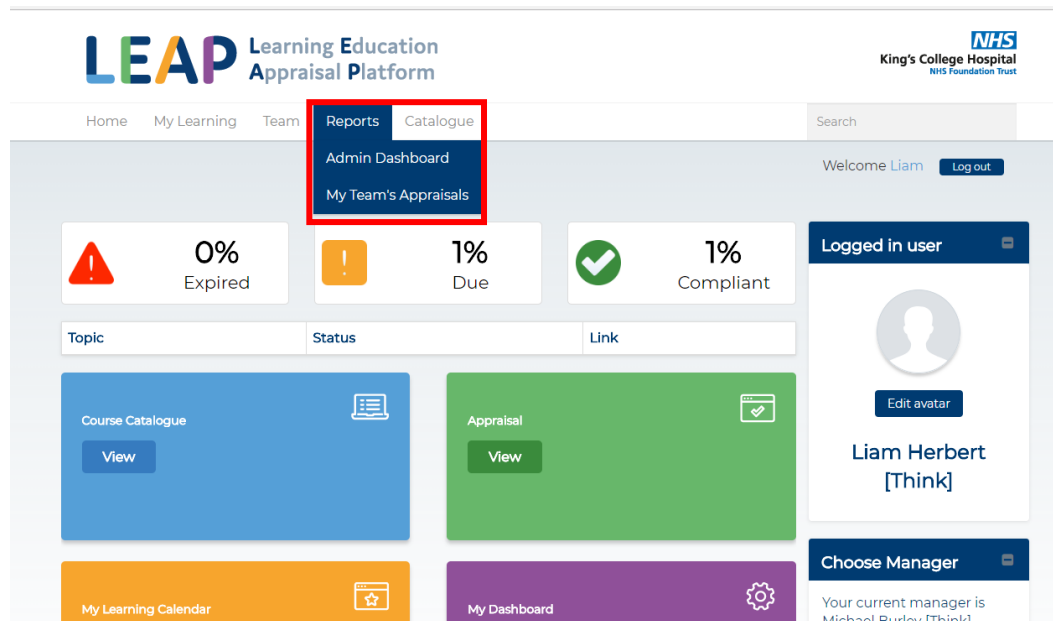
7. LEAP will display a message on the home page, confirming completion of the manager override process. LEAP will also update reports, send a confirmation email to the appraisee, and change the appraisee's "Rapid Appraisal Record" page of the appraisal form to reflect changes that you made as a manager.

✓ Thank you. The appraisal record has been finalised and the appraisee will automatically have a new appraisal form to use, for their next appraisal period. ✕

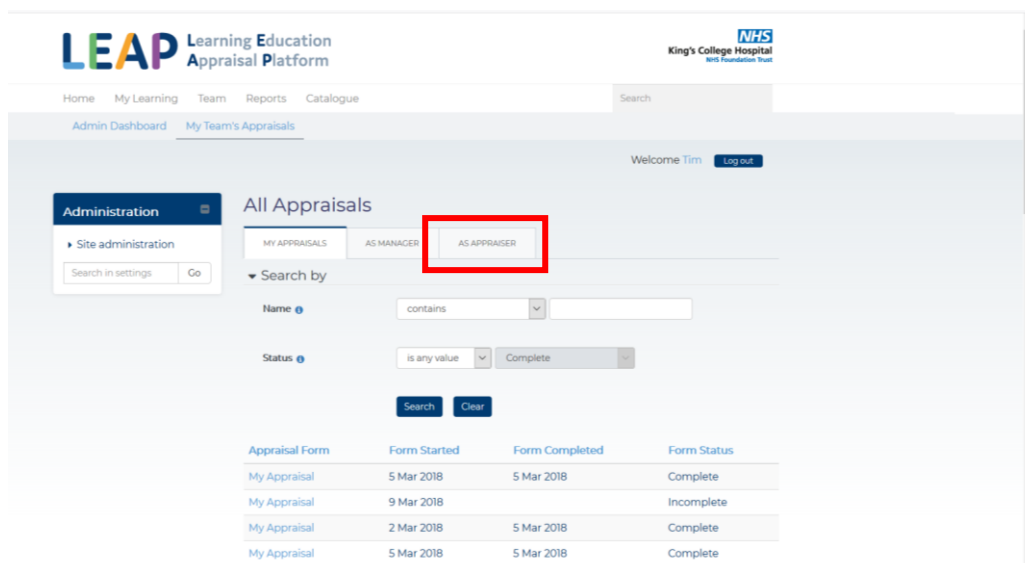
## How to view your staff members' detailed appraisal records, if you are an appraiser.

Appraisees can have a line manager (who is responsible for a variety of activity on LEAP) and also a separate appraiser. This is often the case if the formal line manager delegates appraisal duties to a team of supervisors.

To access appraisee records, start from your LEAP homepage and click “My Team’s Appraisals” under “Reports”:



This will then show all appraisals that you are involved with, initially displaying **your own** appraisal records on the “My Appraisals” tab. Click “As an Appraiser” to view the appraisals for the people who’ve identified you as their appraiser.



This will then display appraisals, complete or incomplete, which have been started by your appraisees.

Team Member	Appraisal Form	Form Started	Form Completed	Appraisal Date	Appraisal Performance Rating	Form Status
Laura Learner	My Appraisal	13 Jun 2018				Incomplete

If your appraisee has more than one appraisal listed, this is due to them opening more than one appraisal form.

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2. Once you have chosen which appraisal form to view, select it by clicking the blue “My Appraisal” text in the relevant row. A confirmation screen will appear.

You can either:

Click “Download PDF” to get a downloadable and printable version of all the information in the appraisal, entered by the appraisee....

...or click the ‘View’ button to continue to view information on screen.

The rest of the process for viewing, downloading or overriding appraisal records as an appraisee is identical to doing it as a manager, so please see the main section of this guide for detailed instructions.