

Step-by-step guide to the Appraisal Form in LEAP

SLaM's [Performance Development Policy](#) requires all staff to have an annual appraisal in the specified appraisal window, usually between April to June. **The Appraisal Form is on LEAP**, and, as of 2022, it has 6 sections:

- **“You”** – staff members reflect generally on themselves and their role.
- **“Health & Wellbeing”** – covering wellbeing at work, including reasonable adjustments and flexible working.
- **“Looking Back”** – staff members reflect on the previous year’s achievements.
- **“Looking Forward”** – staff and managers consider and agree the objectives and learning goals that the team member will pursue in the coming year.
- **“Mandatory training”** – lists current compliance status, as recorded on LEAP.
- **“End of Year Assessment”** – after the appraisal meeting, staff members and line managers (or those appraising on their behalf) make comments on overall performance and Appraisers give a provisional performance rating.

Workshops & Documenting Online

[Appraisal & Performance Development workshops](#) are available to all staff who currently supervise and carry out appraisals. The workshops aim to equip participants with practical knowledge of the Trust's approach to developing high performance through the use of managerial supervision and appraisals. [Workshops can be booked here.](#)

Documenting Appraisal Online

- LEAP provides a mechanism for streamlining and recording appraisals but the strength of the process is underpinned by the quality of preparation and discussions between staff members and those appraising them.
- Online recording of [Appraisal via LEAP](#) takes place through a series of stages, mirroring the Looking Back, Looking Forward and Assessment discussions during Appraisal.

Accessing your Appraisal form on LEAP

You can access your Appraisal form on LEAP any time. You do not need to complete it in one go.

Either you or your Appraiser can start the form.

1. Click the Appraisal menu on the top bar of LEAP and select My Current [or "2022"] Appraisal

The screenshot shows the LEAP website interface. At the top left is the LEAP logo with the tagline "Learn • Engage • Aspire • Perform". To the right is the "South London and Maudsley NHS Foundation Trust" logo. A dark purple navigation bar contains links for Home, Getting Started, Help, My Essential Learning, Appraisal (highlighted with a dropdown menu), Reports, Revalidation, Calendar, and Browse Courses. The dropdown menu for Appraisal is open, showing options for Appraisal Overview, My Current Appraisal, and My Appraisals History. On the left side, there is a "LATEST NEWS" section with a green header and a sub-header "Add a new topic...". Below this, a news item is visible: "Using LEAP as a Trainer Sessions" dated "22 Jun, 11:02" by "Colin Admin Jones". On the right side of the navigation bar, there are search, settings, notification, and user profile icons (labeled "Laura Learner").

The screenshot shows the "Appraisal 2020" workflow page. The top navigation bar is the same as in the previous screenshot, but the "Appraisal" dropdown is closed. Below the navigation bar, there are sub-navigation tabs: Appraisal Overview, My Current Appraisal (selected), My Appraisees, and My Appraisals History. The breadcrumb trail reads "Home / My Workflows / Appraisal 2020". The main heading is "Appraisal 2020". Below the heading, it says "Job assignment linked to this workflow:" followed by a list item "Unnamed job assignment (ID: 1)". The main content area is divided into two sections: "Appraisal Forms" and "Calibration". In the "Appraisal Forms" section, there is a purple "Start" button highlighted with a blue arrow. The "Calibration" section is currently empty.

2. You will come to this screen. When you are ready to start your Appraisal, click **Start** (or **Continue**)

Appraisal Forms

APPRAISAL OVERVIEW & RESOURCES

PREPARING FOR APPRAISAL

1. "YOU"

2. HEALTH AND WELLBEING

3. LOOKING BACK

4. LOOKING FORWARD

5. APPRAISER'S END OF YEAR ASSESSMENT

Appraisal Overview & Preparation

The opening pages have nothing for you to fill in, just a short video and some text explaining the purpose of Appraisals, as well as some prompts to focus your thoughts.

Appraisal Forms

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Page 1: "You"

This is an opportunity for you as the Appraisee to reflect on your role. This section should demonstrate that the Appraisal discussion includes your own personal progress and aims, not just the Trust's corporate objectives.

"You" section - Overview

This section is an opportunity for you as the Appraisee to reflect on your role and more broadly over the last year.

What has gone well for you at work over the last year?

Your answer

What were the challenges that you faced?

Your answer

Where do you feel most and least valued in your role?

Your answer

Any further reflections on your work over the last year?

Your answer

Rich text editor toolbar with icons for text formatting (bold, italic, underline, strikethrough), list creation, link, unlink, insert table, insert image, insert video, insert audio, insert link, insert document, insert table of contents, and alignment options.

1. These "icebreaker" questions aim to focus the discussion on your own personal progress and aims, not just the Trust's corporate objectives. Fill in as much or as little as you choose.

2. You may add here some overall reflections on the past year

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Page 2: Health & Wellbeing

Here you may add details about your health and wellbeing at work, including reasonable adjustments and flexible working.

1. The form contains various wellbeing questions for you to answer

Appraisal Forms

Download PDF

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There are required fields in this form marked *.

"Health & Wellbeing"-section - Overview

This section is a space for the Appraisee to talk about their wellbeing at work which includes reasonable adjustments and flexible working.

The Appraiser should summarise this discussion at the bottom of the page.

In the last year have you experienced a health-related condition that has affected/or continues to affect your ability to do your job?

Your answer *

I had to self-isolate for 10 days on two occasions due to coronavirus symptoms....

Over the last year, have you been able to balance work with your personal commitments and your health and wellbeing?

Your answer

Mostly yes, but I had to take time off in October, when.....

2. You can give as much or as little detail as you choose.

Appraisal Forms

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Page 3: Looking Back

In this stage, you review last year's objectives by adding comments as to progress on those objectives, and on your own development plans

1. You should select objectives from the previous year(s) to review.

Click **Choose Previous Objectives** to do so.

Reviewing last year's Performance Objectives

Choose Previous Objectives

2. A popup window opens, in which you should select those of your previous objectives that you wish to review.

They are listed by (most recent) creation date, or you can use the **Search** tab to search by key word.

Choose Previous Objectives

BROWSE

SEARCH

Select All

Choose...

- Analytics and Reporting (Created: 24/09/2020. Target date: 1/06/2021)
- Digital Adoption and User Engagement (Created: 26/11/2020. Target date: 31/03/2021)
- Helpdesk and System Management (Created: 24/09/2020. Target date: 31/03/2021)
- Stakeholder Engagement and Quality Assurance (Created: 24/09/2020. Target date: 31/03/2021)
- System Management, Development and Project Management (Created: 24/09/2020. Target date: 31/03/2021)
- Analytics and Reporting (Created: 24/09/2020. Target date: 25/09/2020)
- Digital Adoption and User Engagement (Created: 24/09/2020. Target date: 25/09/2020)
- Helpdesk and System Management (Created: 24/09/2020. Target date: 25/09/2020)
- Stakeholder Engagement and Quality Assurance (Created: 24/09/2020. Target date: 25/09/2020)
- System Management Development and Project Management

Items to add

- Digital Adoption and User Engagement (Created: 26/11/2020. Target date: 31/03/2021)
- Analytics and Reporting (Created: 24/09/2020. Target date: 25/09/2020)

3. Each objective clicked will then appear in the "Items to add" list at right. Clicking **Save** will close this popup window, taking you back to the appraisal form, updated with your selected objectives.

Save

Cancel

Reviewing Last Year's Performance Objectives

Test objective

Your answer

I feel like I completed this work task well. The effect was that service users benefited from the reduced waiting times. In doing this work, I tried to model Trust Commitment #2 - "Be prompt and value your time"



Appraiser's answer

Not yet answered

Test 4

Your answer

This objective was difficult to fulfil due to changes in shift patterns and staffing numbers, but in a few cases, I was able to speed up delivery time for this work.



Appraiser's answer

Not yet answered

4. For each Objective, you can add your reflections on progress in the **Your Answer** box.

Or you can access and update the original text for that Objective at this **Edit/View Details** link

[Edit/View Details](#)

[Save this form before clicking.](#)

5. You can also add details of any other things that you ended up working on, that weren't in your agreed Objectives from the last Appraisal.

Recording any **extra Performance Objectives** that were worked on last year

Add extra (retrospective) Performance Objective

Reviewing any from **Previous Development Goals**

Choose Development Goal to review

6. You may review any of your existing development goals. (These “**Personal Development Plan**” goals are usually from previous appraisals).

7. As above, click to select those on the list that you wish to review. This puts them in “Items to add”, then **Save** returns you to the main window.

Choose Previous Development Goals

BROWSE SEARCH

Select All

Choose...

- IT Skills (Personal Development Plan (PDP))
- Presentation Skills (Personal Development Plan (PDP))
- Make pancakes (Personal Development Plan (PDP))

Items to add

IT Skills (Personal Development Plan (PDP))

Save Cancel

IT Skills (Personal Development Plan (PDP))

[Edit/View Details](#)

[Save this form before clicking](#)

Your answer

My training booked was cancelled, but I have done self-directed learning to improve my skills



Appraiser's answer

Not yet answered

8. The chosen Development Goals then appear back on the main window, and you can add your reflections on these in the Your Answer box.

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Page 4: Looking Forward

In this stage,
you identify new Objectives
and personal Development Goals
for the year ahead

1. Click these buttons to add new Objectives, or adapt and renew an objective from a previous appraisal if it is still valid.

Performance Objectives for the year to come

Add new objective

Choose objective to carry forward

2. Similarly, you click here to add or renew Development Goals.

Guidelines - Development Goals for the year to come

Use this section to identify any development you may need to help you carry out your job, or to achieve your objectives. You may also address personal and professional development needs and NHS career aspirations.

Development Goals for the year to come

Add new Development Goal

Carry forward an existing Development Goal

3. Clicking any of these buttons opens a popup window, which you add or edit as needed. Then **Save**, and you will be taken back to the main “Looking Forward” page, updated with the details you entered.

Longer term, how do you see your career developing?

Your answer



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Page 5: Mandatory Training

There's nothing to add here.
This page just displays the
current status of your
mandatory training compliance,
as recorded in LEAP.



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Page 6: Appraiser's End of Year Assessment

Here you may add reflections and indicate whether you agree with your Appraiser's End of Year Assessment

SLaM Performance Assessment Rating

 **Appraiser's answer**

Nothing yet selected

Appraiser's comments on overall performance, including a rationale for the appraisal rating

 **Appraiser's answer**

Not yet answered

Appraisee's comments on overall performance

Your answer

Appraiser may upload any supporting documentation here

 **Appraiser's answer**

Not yet answered

Before finalising: Appraisee - Please state if you agree with the contents of this Appraisal:

Your answer

- Yes
- No

1. The Appraiser is responsible for completing most of this section. You have an opportunity to comment on feedback and overall performance for the year.

2. And finally, you can review and indicate **Yes** or **No** on whether you agree with the contents of your Appraisal. Remember to click **Save!**

The Appraiser has an additional button of Finalise Appraisal once all has been completed and agreed.

Appraisal
finalised for
this year

Congratulations!
You have completed your
appraisal for this year.