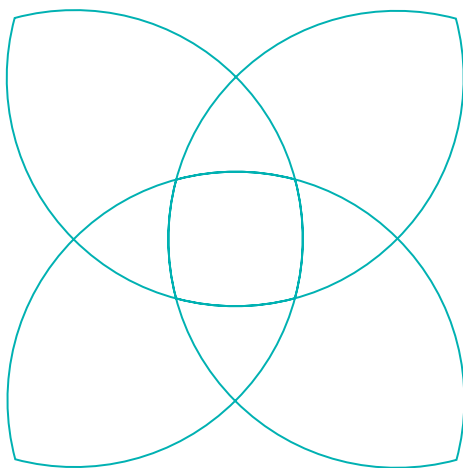




# Medical Revalidation User Guide


# Medical Revalidation User Guide





## Contact SARD

### Get in touch with us

If you have any questions or feedback, please contact us either by phone or email

 0208 771 4153 or 07441 906 342

 [info@sardjv.co.uk](mailto:info@sardjv.co.uk)

 [www.sardjv.co.uk](http://www.sardjv.co.uk)

### Where to find us / write to us:

Suite 2B  
25-27 Westow Street  
London  
SE19 3RY

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# Medical Revalidation User Guide

## 1 Requesting a SARD account

Access to the website is by invitation only, and accounts are set up by the administrator within your organisation. Your administrator contacts are listed on the sign in page. If you believe that you should have access to the site then you should contact one of these administrators and request an invitation.

## 2 Accessing SARD for the first time

Once your account has been set up, you will receive an invitation email, which will come from [support@sardjv.co.uk](mailto:support@sardjv.co.uk). Click on the 'Accept Invitation' link within the email to set your own brand new password and get started. Your username is the email address that the original invitation was sent to.

Once you have set your password, you will see a welcome screen that will prompt you for information. The portfolio of supporting evidence is based upon your medical roles. You will be asked which roles are applicable e.g. whether you are a clinical supervisor, inpatient doctor, community doctor, psychiatrist, anaesthetist, etc. You can select as many roles as you wish.

You may also be asked to set your appraiser. If you don't know who your lead appraiser should be, you can leave this set to the default and change it later once you have found out. Once you are happy that you have provided the information requested you should check the confirmation box and press the "Save and continue" button.

Now that you have completed your initial setup, you will be able to access SARD from now on using your email address and password on the main sign in page.

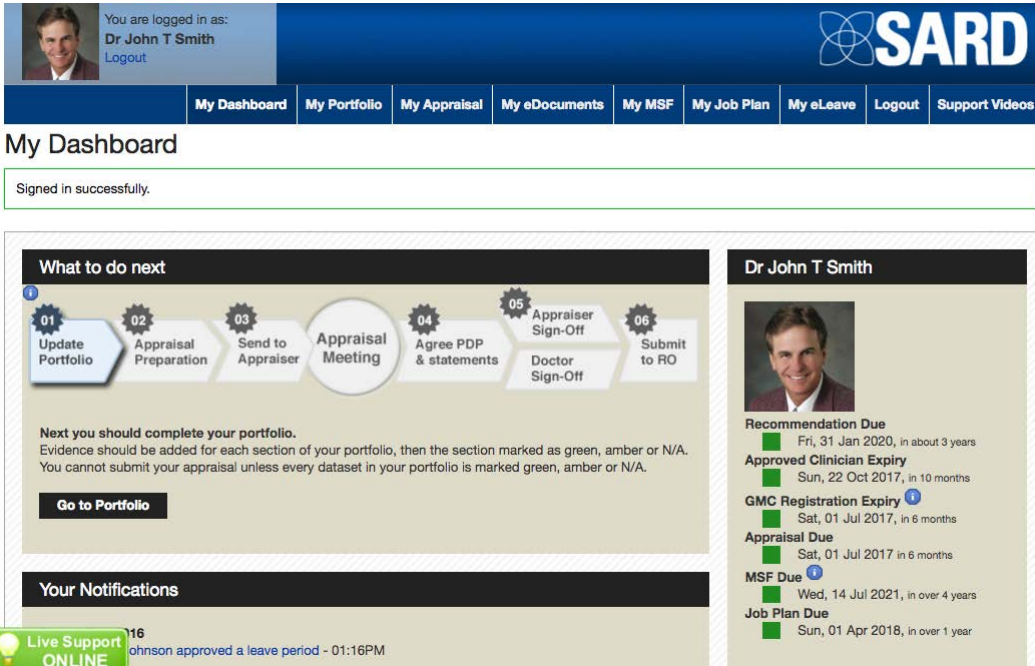
## Can my PA edit my appraisal for me?



It is possible to give a PA access as a 'delegate', so that they can log in and work on your appraisal on your behalf. You can contact your revalidation administrator to request this.

## 3 Your Dashboard

The Dashboard is the 'hub' of your SARD account. It is the first page you will see when you log in, and from here you can get an overview of your progress, view any notifications you may have, and access all the various modules:



The screenshot shows the SARD 'My Dashboard' interface. At the top, a blue header bar contains the SARD logo and a navigation menu with links: My Dashboard, My Portfolio, My Appraisal, My eDocuments, My MSF, My Job Plan, My eLeave, Logout, and Support Videos. Below the header, a message states 'Signed in successfully.' The main content area is divided into three sections:

- What to do next:** A horizontal flowchart with six steps: 01 Update Portfolio, 02 Appraisal Preparation, 03 Send to Appraiser, 04 Appraisal Meeting, 05 Agree PDP & statements, and 06 Appraiser Sign-Off. Below the flowchart, text indicates the next step is to complete the portfolio, with a 'Go to Portfolio' button.
- Dr John T Smith:** A profile section showing a photo and a list of upcoming deadlines: Recommendation Due (Fri, 31 Jan 2020, in about 3 years), Approved Clinician Expiry (Sun, 22 Oct 2017, in 10 months), GMC Registration Expiry (Sat, 01 Jul 2017, in 6 months), Appraisal Due (Sat, 01 Jul 2017, in 6 months), MSF Due (Wed, 14 Jul 2021, in over 4 years), and Job Plan Due (Sun, 01 Apr 2018, in over 1 year).
- Your Notifications:** A section at the bottom left showing a notification from 'Live Support ONLINE' stating 'Johnson approved a leave period - 01:16PM'.

Please note this image shows an example—your actual dashboard appearance and available modules will vary depending on your organisation and role.

You can also check and change your profile details via the Dashboard, in the 'Edit My Details' area. You can even add a photograph here if you wish.

**Your Details**

**GMC Reference Number:** 123456788

**Employee Number:** 3

**Email:** john@example.com

**Directorate:** Test

**Location org I4:** KH Test Location Org

**Team org I5:** Andrews Team

**Delegates:**  
Mrs Bella Owen  
Miss Jane T Jones

**Lead Appraiser:**  
Dr Janet T Johnson  
[Email: janet@example.com](mailto:janet@example.com)

**Medical Roles:**  
DIR ALD Doctor (T)  
Doctor  
Educational Supervisor  
Inpatient Doctor (T)  
Psychiatrist (T)  
Those with responsibility to section (T)

**Edit My Details**

### 3.1 Progress Bar

The 'What To Do Next' progress bar at the top of your dashboard shows how you are progressing with your appraisal, what steps you have yet to take and in which order.

### 3.2 Notifications

Here you can see any recent notifications, such as whether your appraiser has looked at your appraisal after you've submitted it, or if your administrator has uploaded some files for you.

### 3.3 Starting a new appraisal

If you have no appraisal open, you can start a new one by clicking on 'New Appraisal'. This will prompt you to confirm which year the appraisal will be covering. You will be redirected to your Dashboard Page from where you can start filling out your Portfolio and subsequently your Appraisal.

## 4 How SARD Works

### –The Portfolio & Appraisal system

SARD performs two functions; providing the forms for annual appraisal and a portfolio for gathering evidence against the GMC's Good Medical Practice Portfolio.

#### 4.1 The Portfolio

The Portfolio is where you attach and store most of your evidence documents. Think of it as a sort of filing cabinet, where you can upload documents as you get them across the year, rather than having to rush everything at once at appraisal time. You can even use it to gather evidence over a number of years, keeping an ongoing store alongside your appraisal.

The sections on your portfolio may vary depending on your organisation and your role, but they are always set up to ensure that by providing all the relevant evidence listed you will be covering the requirements of the GMC's Good Medical Practice framework. The portfolio looks similar to this:

Portfolio Dec 2016 for **Dr Amber T Read**

[Go to Appraisal](#)
[Download as PDF](#)

<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>1 Good Medical Care (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Discharge Notifications (T)         </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>2 Clinical Activity Data (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> DNA rate (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Cancelled appointments (T)         </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>4 Maintaining Good Practice (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Peer supervision (T)         </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>5 Continuing Professional Development (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> RCPCH CPD certificate (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Continuing Professional Development (CPD) (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Mandatory &amp; Essential Skills Training (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Educational Supervisors completed &amp; signed Deanery portfolio (T)         </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>6 Teaching (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Educational/clinical supervision activity (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Educators Appraisal         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> 360 degree trainee feedback (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Feedback from teaching (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Teaching (T)         </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;"> <b>7 Relationships with Patients (T)</b> </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Complaints &amp; Incidents (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Patient Reported Outcome Measures (PROM) (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Patient Reported Experience Measures (PREM) (T)         </div> <div style="padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> 360 degree patient feedback (T)         </div>
---

**Discharge Notifications (T)**

Evidence that discharge notifications are completed & sent in a timely manner to GPs. Testing edit KH

RED

AMBER

GREEN

N/A

Click on the buttons above to change the status:

- Red means you haven't started this section yet.
- Amber means you are working on this section, but it is not yet finished.
- Green means you have added evidence and this section is complete.
- N/A means this section is not applicable to you.

---

**Evidence**

Type your evidence here...

Expiry Date:

[Attach Document](#)

[Save Evidence](#)

---

**Comments / Reflection**

Type your comment here...

[Save Comment / Reflection](#)

---

**Private Notes**

Type your note here...

[Save Note](#)

## My portfolio page is blank!



If your portfolio page is coming up blank, with no numbered sections, it may be that your system roles have not been set properly. Please contact us on Live Chat and we will be able to remedy this quickly.

When you start on SARD you are required to fill in your portfolio first. The portfolio saves all your documentation and automatically links your evidence attachments to the relevant parts of your appraisal. If you make sure you do your portfolio first it will save you a lot of time when you come to filling in your actual appraisal!



Only free text or attached documents in the portfolio 'Evidence' boxes will pull through to *My Appraisal* – text in the 'Comments/reflection' or 'Private Notes' boxes will not.

### 4.1.1 Finding your way around the portfolio

When you navigate to the portfolio you will see a series of sections down the left hand side of the page. These will all be red to begin with. As you work on each section, you need to click the buttons within them to change the status to reflect your progress:



**Red:** means you haven't started working on the section yet

**Amber:** means that you have started working on the section but need to come back and add more later

**Green:** means that you have added evidence and consider the section to be complete.

**N/A:** this section is not applicable to you.

You can only submit your appraisal once all sections of the portfolio are marked green, amber or N/A!

### 4.1.2 Uploading evidence to your portfolio

Remember to remove any patient identifiable information before you upload your document! Data should be modified either electronically (e.g. by editing a Word document to replace names with XXX), or by using correction fluid or opaque marker on a hard copy document before scanning.

#### What file types can I use?



There is no limit to the amount or type of files you can upload to your portfolio or appraisal. However, do bear in mind that your appraiser will need to be able to open them, so PDFs, Word and Excel documents are usually the most accessible. If you need to upload the contents of an email, we advise you copy and paste it into a Word document first.

First, enter a description that explains the content of the evidence:

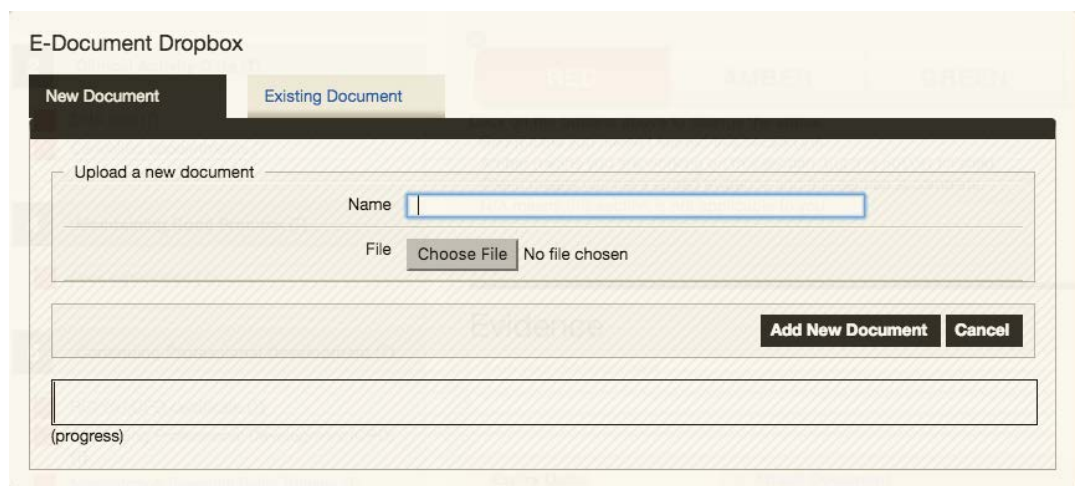


**Evidence**

Research paper on being a doctor in the UK

Expiry Date:  [Attach Document](#) **Save Evidence**

Next, click on 'Attach Document'. You will see this window:



**E-Document Dropbox**

**New Document** Existing Document

Upload a new document

Name

File  No file chosen

**Add New Document** **Cancel**

(progress)

Type a name for your evidence (if you leave this blank it will just fill it in with the filename), and click 'Choose File' to browse your computer for the document



you wish to upload. Once you have chosen it, click 'Add New Document'

When you have added the document, you have the option to select an expiry date from a drop down calendar. If a document does not have an expiry date, leave this field blank.


## How do expiry dates work?



Adding an expiry date is not mandatory, but is a useful way of maintaining an ongoing portfolio archive with only the relevant items being pulled across to each appraisal. Evidence ceases to appear in new appraisals opened after the expiry date. It will continue to appear in any appraisal for which it is valid for even a part of the period the appraisal covers.


*Example: Dr Quinn's appraisal runs from 1st April to 31st March. They have a piece of evidence with an expiry date of 25th March. The evidence remains on this appraisal all year. When the medic opens a new appraisal on the following 1st April, the evidence will no longer appear.*

Once you've attached the file and set an expiration date, press 'Save Evidence'. The evidence will appear in your portfolio like this:



Research paper on being a doctor in the UK

**Expires: 09/01/2013**  
[Edit](#) | [Remove](#)



Research Paper

## The evidence I am uploading to the portfolio is appearing twice



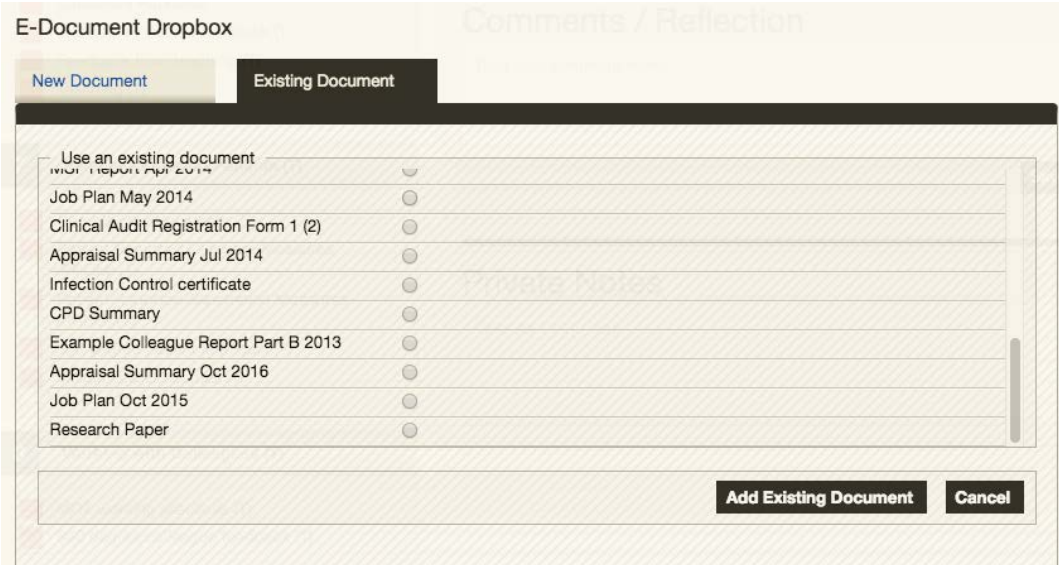
This is usually an issue with browser caching—the 'duplicate' evidence is in fact just a mirror, not really a second upload. Refreshing the page by pressing F5 will normally solve this.

If it continues happening, we recommend you clear your cache. Instructions for doing that on different browsers can be found here:

<http://refreshyourcache.com/en/cache/>

### 4.1.3 Using the same file multiple times

If one file is relevant to several sections of your portfolio, you don't need to upload it from scratch every single time. When you click 'Attach Document', you can click on the 'Existing Document' tab on the pop up window that appears. Here all your previously uploaded files will appear and you can select the file from the list.



### Can I upload lots of documents at once?



As well as uploading directly to your portfolio, you can attach documents to an email and send it to [send@edocs.sardjv.co.uk](mailto:send@edocs.sardjv.co.uk). You can attach multiple documents at once, up to a total of no more than 20MB.

These attachments will appear under the 'My Edocuments' page of your dashboard. You can then attach them to your portfolio by following the instructions above for adding an existing document.

The email needs to be sent from the address that you use to sign in to your SARD account.

#### 4.1.4 Comments/Reflection

Here you can leave additional comments regarding the section you've just filled in. For instance if you have a reason why there is not yet any evidence in a particular section, you can leave a comment in this box and your appraiser will be able to see it. Please note that these comments do not come across into the appraisal page—only Evidence does that.

#### 4.1.5 Private Notes

Here you can leave notes that only you can see, not your appraiser. This might be useful if you want to write something to remind yourself of evidence you need to come back to.

### What next?

Once all the sections of your portfolio have been marked green, amber or N/A, you should move on to your appraisal. You can find this by clicking on the 'My Appraisal' tab or by clicking the 'Go To Appraisal' button on the top right of the portfolio page.

*(see next page)*

## 5 The Appraisal

The appraisal page is based on the official GMC format and will look similar to this:

Appraisal Dec 2016 for **Dr Amber T Read**

**DRAFT**

Download as PDF

Go To Portfolio

Created: 01/12/2016  
Submitted: None  
Meeting date: None  
Completed: None

Lead Appraiser:  
Dr Ify Okocha  
Tel:  
Email: ify@example.com

1 Contents

2 Instructions

3 Personal Details

4 Scope of Work

5 Record of annual appraisals

6 Personal development plans and their review

7 Continuing Professional Development

8 Quality Improvement Activity

9 Significant Events

10 Feedback from colleagues and patients

11 Review of complaints

12 Teaching, research, leadership and innovation

13 Achievements, challenges and aspirations

14 Probity and health statements

15 Additional Information

16 Personal development plan proposals

17 Supporting Information

18 Pre-appraisal preparation

Submit to Appraiser

19 The agreed personal development plan

20 Appraisal Summary

21 Appraiser Statement

22 Doctor Statement

Section 1 of 22

Contents

Welcome!

Please click on 'Instructions' for guidance on how to enter the information required for your appraisal.

Section 1 [Contents](#)

Section 2 [Instructions](#)

Section 3 [Personal Details](#)

Section 4 [Scope of Work](#)

Section 5 [Record of annual appraisals](#)

Section 6 [Personal development plans and their review](#)

Section 7 [Continuing Professional Development](#)

Section 8 [Quality Improvement Activity](#)

Section 9 [Significant Events](#)

Section 10 [Feedback from colleagues and patients](#)

Section 11 [Review of complaints](#)

Section 12 [Teaching, research, leadership and innovation](#)

Section 13 [Achievements, challenges and aspirations](#)

Section 14 [Probity and health statements](#)

Section 15 [Additional Information](#)

Section 16 [Personal development plan proposals](#)

Section 17 [Supporting Information](#)

Section 18 [Pre-appraisal preparation](#)

Section 19 [The agreed personal development plan](#)

Section 20 [Appraisal Summary](#)

Section 21 [Appraiser Statement](#)

Section 22 [Doctor Statement](#)

On the top left of the screen you can see some headline information about your appraisal:

Download as PDF

Go To Portfolio

Created: 15/07/2016  
Submitted: None  
Meeting date: None  
Completed: None

Lead Appraiser:  
Dr Janet T Johnson  
Tel:  
Email: [janet@example.com](mailto:janet@example.com)

**Create:** the date that you opened this appraisal

**Submitted:** the date your appraisal was submitted to your appraiser

**Meeting date:** this is filled in automatically when your appraisal is completed and shows the day you met with your appraiser

**Completed:** this is filled in automatically when your appraisal is completed and shows the day the last party signed it off–this is your official appraisal completion date.

Beneath these are the details of your lead appraiser.

## How do I change my appraiser?



Some trusts allocate appraisers centrally, and in this case you would need to contact your revalidation support office. However, if your trust lets you choose your own appraiser, you can change them in Section 3 of your appraisal–your Personal Details section. Simply select your new appraiser from the drop down box and click 'Save'. If your appraisal has already been submitted, it will be withdrawn from your old appraiser and automatically re-submitted to the new one.

\*Lead Appraiser

Johnson, Dr Janet T

If your appraiser is greyed out or not listed in the box then please contact your organisation's administrator: [email administrator](#).

## How do I add an additional/academic appraiser?

You can do this in Section 3 of your appraisal. Just answer 'yes' to either of the questions below and you will be able to enter the name and email address of your additional or academic appraiser:

Are you a clinical academic who requires an academic appraiser under the Follett principles? If your lead appraiser is your academic appraiser, please select No. 

- ☒ Yes  
☐ No

\* Academic appraiser's name

\* Academic appraiser's email

Do you require an additional appraiser? 

- ☐ Yes  
☐ No

The additional/academic appraiser does not need to have their own SARD account. Instead, when you submit your appraisal, they will receive an email notification with a link that they can click to view your appraisal and portfolio. It is very important therefore that you make sure the email address is accurate!

### 5.1 Finding your way around the appraisal

The appraisal is made up of 21 sections, and you can move between them by clicking on the section headings on the left of the page. To prepare for your appraisal you are required to fill in all sections down as far as the red 'Submit to Appraiser' button.

All evidence in the portfolio is automatically linked to the relevant sections of your appraisal, so if you have already completed your portfolio you will find that a lot of your work here is already done. You should not need to add very much evidence to the appraisal itself.

Once you have completed a section you can click the green 'mark as complete' button, which will change the number of the section to a green colour.

Please note: You will need to press the 'Save Section' button at the bottom of the section you are working on if you want to save your information. Navigating away from a section before saving will lose all your entered data.

## 5.2 Submitting your appraisal

Once you have marked everything down to the 'Submit to Appraiser' button complete and all sections of your portfolio are marked green, amber or N/A, you will be able to click the button to submit the appraisal to your appraiser.

### 5.2.1 How do I know if my appraisal has been submitted?

The label in the top right of the appraisal page shows its status:

**DRAFT**

Only you can see it

**SUBMITTED**

Your appraiser can now review it

**COMPLETE**

All sections have been signed off by you and your appraiser

#### Can I add evidence after my appraisal has been submitted?



You can continue to edit your appraisal and portfolio right up until it is fully signed off by yourself and your appraiser. Your appraiser will be notified by email of any changes you make.

#### How do I change my meeting date?



You can change your appraisal meeting date in Section 3 of your appraisal. Please note though that this does not affect your appraisal due date as shown on your dashboard–this will always show the date your appraisal needs to be completed by, regardless of when you have booked your meeting.

##### Appraisal Details

\* When your appraisal meeting is due to take place (dd/mm/yyyy)

16/07/2016



## 6 Completing the appraisal

Your appraiser will receive a notification that you have submitted your appraisal and will be able to have a look through it prior to your meeting. When you meet with your appraiser you can discuss the appraisal and devise a personal development plan. After the meeting yourself and your appraiser will need to work through the final sign off sections, marking them as complete as you go. Once the final section has been completed the appraisal will automatically lock down and be marked as 'Complete'. A read only version will be sent to the RO and your appraisal process is finished!

### 6.1 Can I download a copy of my completed appraisal?

You can download a copy of your appraisal or portfolio to PDF by pressing the 'Download as PDF' button at the top left of your appraisal page.

## 7 Starting your next appraisal

If you wish, you can open a new appraisal right away after completing your last one. You will find that your portfolio will reopen with the evidence that was on there when you completed your last appraisal. You can remove evidence and add new evidence as required to update it ready for your next appraisal. This won't affect any evidence on completed appraisals.

## 8 Help and Support

If you require some additional help, we have online support available every weekday between 9-5 via our Online Chat System. Just click on the green button in the bottom left of your screen to open a chat window:

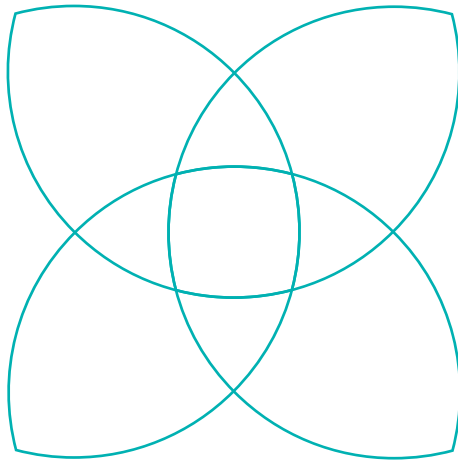


Need support out of hours? Click on the 'help and feedback' button in the bottom right of your screen:

This will open a support window—on the left you'll find links to Knowledge Base articles. If you can't find the answer to your question there, fill out the 'contact support' form on the right and someone will get back to you as soon as we're back in the office. If you have feedback or would like us to make any changes to SARD, please leave fill out the form found under the 'Give Feedback' tab.

As usual let us know if you have any questions or comments via the live chat system or via email at [support@sardjv.co.uk](mailto:support@sardjv.co.uk).





Our promise is simple:  
Great Technology and  
Great Customer Service.



[www.sardjv.co.uk](http://www.sardjv.co.uk)