

Tips & Guidelines

... for Technology-Assisted Appraisals

Information for all Appraisers from Dr Jonty West, Clinical Appraisal Lead NHSE/I SE



Once Appraisals Resume:

- No need to request permission – all appraisals are to be Technology-Assisted Appraisals (TAAs) until further notice.
- Appraisals must be via video – telephone appraisals are not acceptable.
- Please discuss with your Admin Team if you really feel face-to-face or telephone is necessary and/or appropriate.



Which Technology?

- We do not mandate which technology to use.
- Please see video-conferencing tools information sheets on our website.
- You should ensure that both parties are able to access, and are comfortable with, the technology to be used.
- Technology must function on the day – minimum 1.2 mbps.
- Technology needs to function well enough to simulate a face-to-face appraisal... You will need to be able to see and hear one another!



Tips for Technology-Assisted Appraisals (TAAs):

- Ensure you have all supporting information to hand 2 weeks in advance.
- Confirm the technology in advance:
 - Consider a pre-appraisal meeting to check everything works
 - Check lighting and background
 - Set ground rules, i.e. how long it is expected to take, ensure no interruptions, schedule appropriate breaks
- If necessary, confirm your identities – passport/IDs.
- Advance plan for problems like poor connection – try reconnecting and, if necessary, re-arrange.
- Ensure you have each other's mobile numbers so you can communicate quickly and easily in the event of any issues.



The Appraisal Summary:

- Confirm that it was a TAA and the reason why.
- State in summary:
 - The duration of the appraisal discussion
 - Which technology was used
 - Whether there were any interruptions or connection issues, and if you had to reconnect.