**Preparation for Appraisal**  
This section is to be completed by the appraisee prior to the appraisal interview.

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| **Name:** |  | | | |
| **Job title:** |  | | **Registration date:** |  |
| Appraisal is intended to allow Bluestones Medical Complex Care and appraisee to regularly discuss the intended requirements of both parties by opening a regular communication channel. This will help achieve the objectives of the business and pinpoint the support, which the appraisee needs, to be able to respond positively to those objectives.  It is recommended that this form is used to help you think about the job which you do, prior to your appraisal, of which the date and time is: | | | | |
| **Appraisal date:** | | **Appraisal time:** | | |
| **Describe your understanding of your key responsibilities and duties:** | | | | |
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| **Which parts of the job do you feel you do well?** | | | | |
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| **Which parts of your job do you have difficulties with and are there any obstacles which cause you problems?** | | | | |
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| **Do you consider that you have been adequately supported by the Complex Care team in carrying out your objectives?** | | | | |
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| **What further training, (if any), do you feel you need to do your job? What further support, (if any), do you feel you need?** |
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| **Describe how you feel about your responsibilities for compliance with legal requirements. Particularly note any**  **difficulties in achieving compliance which you regard as not within your control, for which you feel you lack support, or for which you feel you lack training.** |
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| **How do you feel you are regarded by the Complex Care team? Do you have any issues with ANY relationships which affect your performance, and which may be assisted by training or coaching?** |
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| **How do you feel about your relationship with your co-workers? Is there any support, training or coaching which you feel you need to improve the relationships and improve productivity and compliance?** |
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| **Is there anything that Bluestones Medical Complex Care Limited can do to assist you to achieve an ambition in both your professional and personal life?** |
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| **Are there any other points you would like to raise with your appraiser?** |
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| **Score your own capability or knowledge in the following areas in terms of your current role requirements (1 = Poor, 3 = Adequate, 5 = Excellent). If appropriate, bring evidence with you to the appraisal to support your assessment.** | | |
| **Capability area** | **Score** | **Notes and comments** |
| **Technical Knowledge (Functional/expert area)** |  |  |
| **Technical Knowledge (Legal and best practice compliance)** |  |  |
| **Customer Relations** |  |  |
| **Time Management** |  |  |
| **Cost Control** |  |  |
| **Reporting and Administration** |  |  |
| **Communication Skills** |  |  |
| **Delegation Skills** |  |  |
| **IT/Equipment/Machinery Skills** |  |  |
| **Ability to reflect on own performance** |  |  |
| **Problem-solving and decision making** |  |  |
| **Team working and developing others** |  |  |

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| **Any other business you wish to discuss, please give as much detail as possible for the benefit of your appraiser;** |
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| **How could the appraisee improve the way they do their job, other than the specifics agreed above? Detail how this is to be achieved.** |
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| **Development and training**  Discuss and record what development the appraisee could usefully undergo in order to improve the way they do their job, achieve their objectives as set out in the Business Plan, and meet their compliance obligations.  Consider future potential and development, in particular highlighting specific areas for training (recommended training might take the form of on-the-job training, coaching, or attending a course). |
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| **Job Description**  In the light of this appraisal, identify any changes to the key areas of the job description and make recommendations for any appropriate amendments. |
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**Appraisal Notes to be completed by the appraiser.**

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| **Appraisers’ comments (to be completed during the interview, or a short re-interview arranged later to discuss).** |
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| **Appraisee's comments (to be completed during the interview, or a short re-interview arranged later to discuss).** |
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**Action Plan**

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| **Key areas discussed** | | **Action Plan to be followed - state by whom** |
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| **I hereby confirm that this is a fair and accurate representation of the appraisal discussion.** | | |
| **Signature (appraisee):** |  | |
| **Signature (appraiser):** |  | |
| **Date:** |  | |