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# How to: Documenting a Values Based Appraisal that has been completed on paper

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For colleagues who do not have access to complete their appraisal directly in the My Learning Hub system or whose preference is to complete their appraisal on paper, we have provided a paper version of the form.

There are different versions of this paper form available to you. The first is a condensed version that prints over fewer pages: we have produced some versions with spaces for additional objectives should you wish to set more than 5 objectives for the next 12 months.

The content of each of these versions is the same, the only difference is the amount of space available to you to record your information and objectives.

You can find the paper version of the Values Based appraisal form in one of two places:

1. On our Trust intranet site using this link:  
<http://ouh.oxnet.nhs.uk/LearningOD/Pages/ValuesBasedAppraisal.aspx>
2. Or in the resource library on My Learning Hub. Instructions for this are later in this guide.

After the appraisal is complete, the paper documents can be uploaded into the My Learning Hub system and the instructions for this follow. This can be done by either the person being appraised or by their line manager. Instructions for both follow here.

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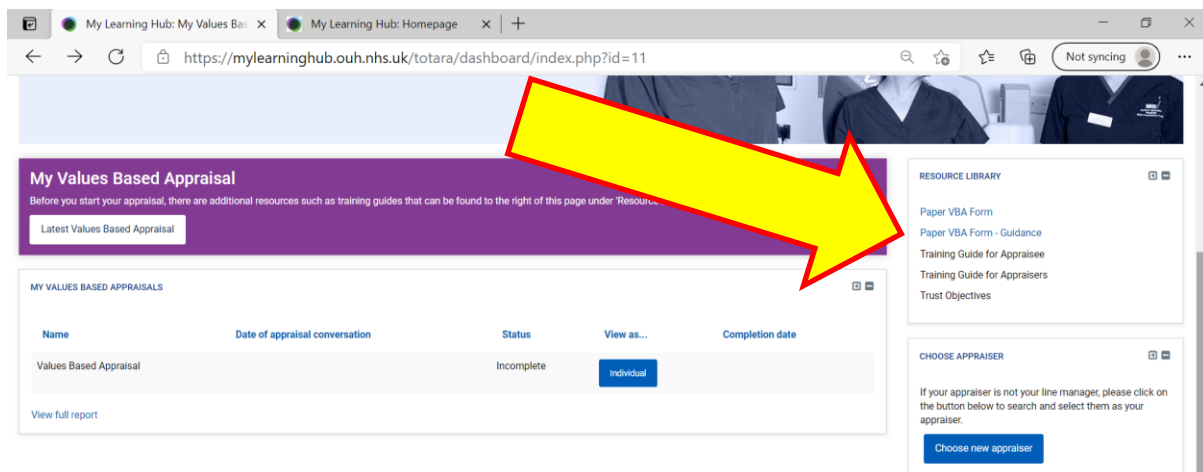
## OUR VALUES

## Section 1: How to access a paper based Values Based Appraisals form

There are two ways that you can access a paper version of the form.

Firstly, you can download the form and supporting documentation from our intranet page here: <http://ouh.oxnet.nhs.uk/LearningOD/Pages/ValuesBasedAppraisal.aspx>

Secondly, you can download the form from My Learning Hub. It can be found in the resource library on the front-page Values Based Appraisal area.



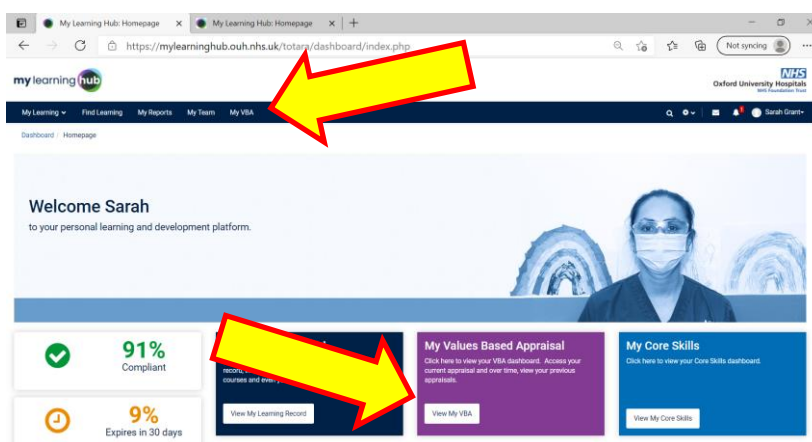
**IMPORTANT NOTE:** The paper-based Values Based Appraisals form is designed for use by colleagues who prefer to work offline or who do not have access to a computer. Although you can type into it, it is not designed to enable this. If you wish to complete your appraisal electronically, you are advised to do so in the version contained in My Learning Hub.

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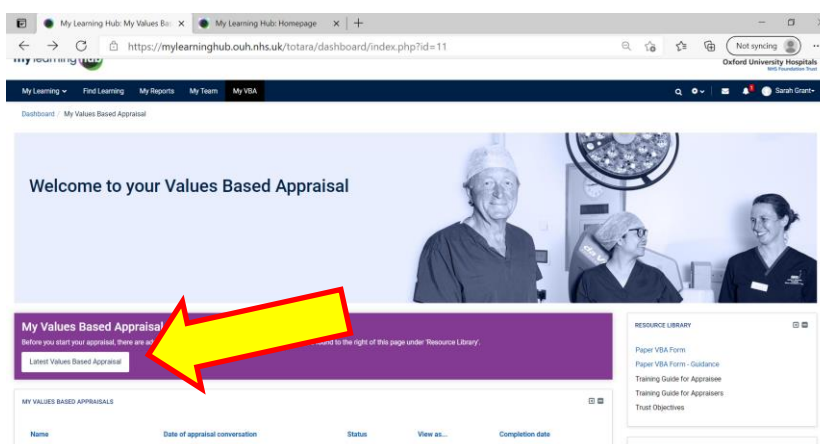
## Section 2: Recording an Appraisal that has been conducted using a paper form as the individual being appraised.

Should you choose to complete your appraisal using a paper form, you will need to follow the instructions below to register its completion within My Learning Hub.

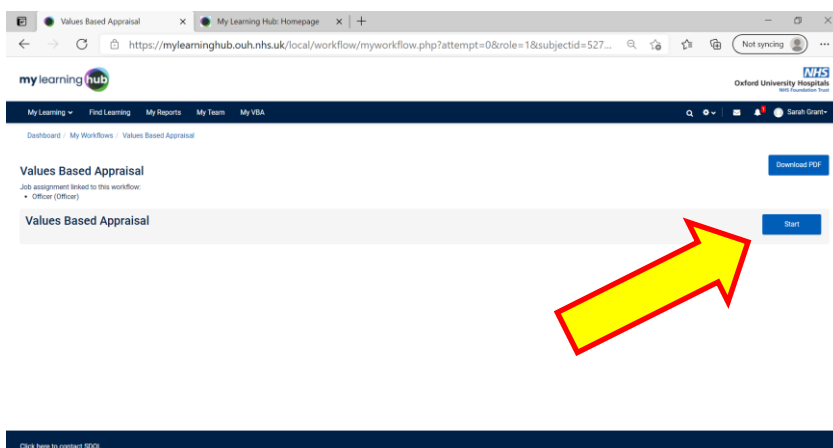
1. Log into My learning Hub and select the option to enter the Values Based Appraisal module. There are 2 buttons that you can use to do this which are highlighted in the screen shot below. Both options will take you to the same place.



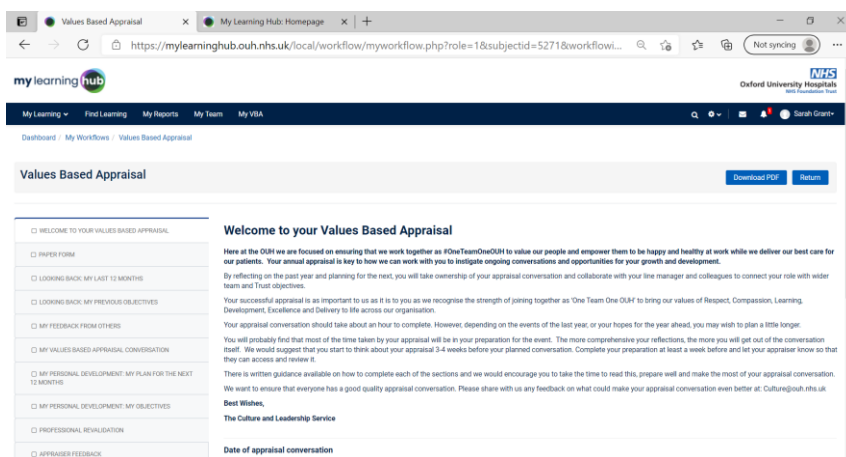
2. Select the options that take you through to the start of your appraisal:



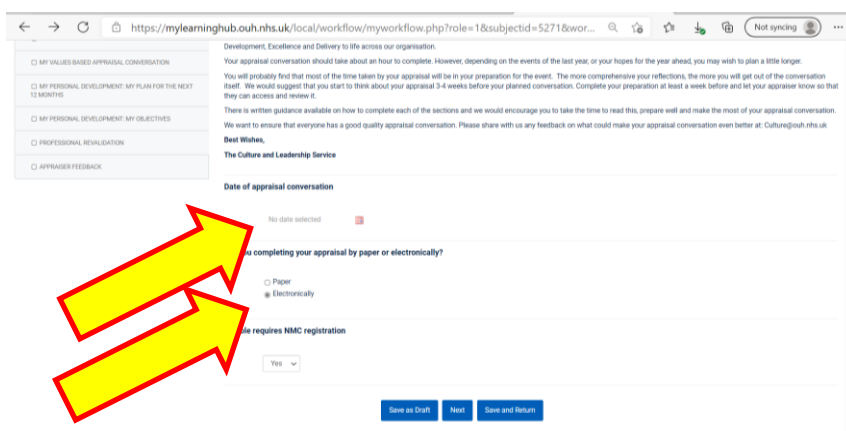
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You will then 'land' on the Welcome page for the VBA form.



3. Scroll down the welcome page to the tick box options and enter the date your appraisal was completed and then tick the box to say that you will be completing your appraisal on paper.



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4. If you click next, this will then close the remaining tabs of the appraisal and replace them with a tab titled 'Paper Form'

Dashboard / My Workflows / Values Based Appraisal

Values Based Appraisal [Return](#)

WELCOME TO YOUR VALUES BASED APPRAISAL

WELCOME TO YOUR VALUES BASED APPRAISAL

If you have completed your appraisal on paper, please upload your document here.

Maximum size for new files: 50MB, maximum attachments: 10

File upload help

To upload a document you have two options:

1. Drag and drop the document into the file upload area below.
2. Click on the upload icon . You will then see a new window (shown below) where you can click the "Choose file" button [Choose File](#). You can then select your file from the location on your computer. Once you have selected your file, you can ignore the other fields in the window for "Save as", "Author" and "Choose licence" and simply click "Upload this file".

[Save and Return](#) [Complete appraisal](#)

Help with how to upload the appraisal form can be found on this page.

WELCOME TO YOUR VALUES BASED APPRAISAL

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[Save and Return](#) [Complete appraisal](#)

5. Once you have uploaded your form, you will need to click on the 'Complete appraisal' button at the bottom of the page.

WELCOME TO YOUR VALUES BASED APPRAISAL

WELCOME TO YOUR VALUES BASED APPRAISAL

If you have completed your appraisal on paper, please upload your document here.

Maximum size for new files: 50MB, maximum attachments: 10

File upload help

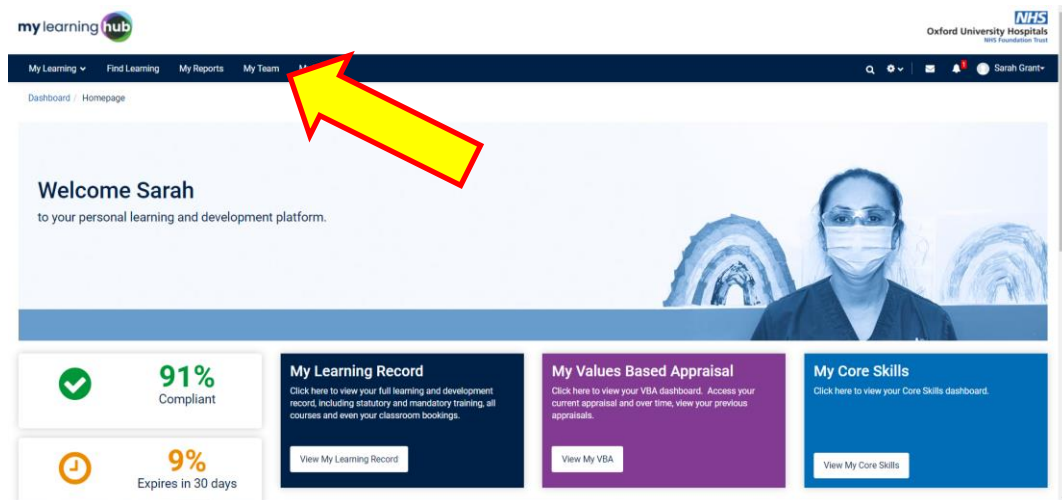
To upload a document you have two options:

1. Drag and drop the document into the file upload area below.
2. Click on the upload icon . You will then see a new window (shown below) where you can click the "Choose file" button [Choose File](#). You can then select your file from the location on your computer. Once you have selected your file, you can ignore the other fields in the window for "Save as", "Author" and "Choose licence" and simply click "Upload this file".

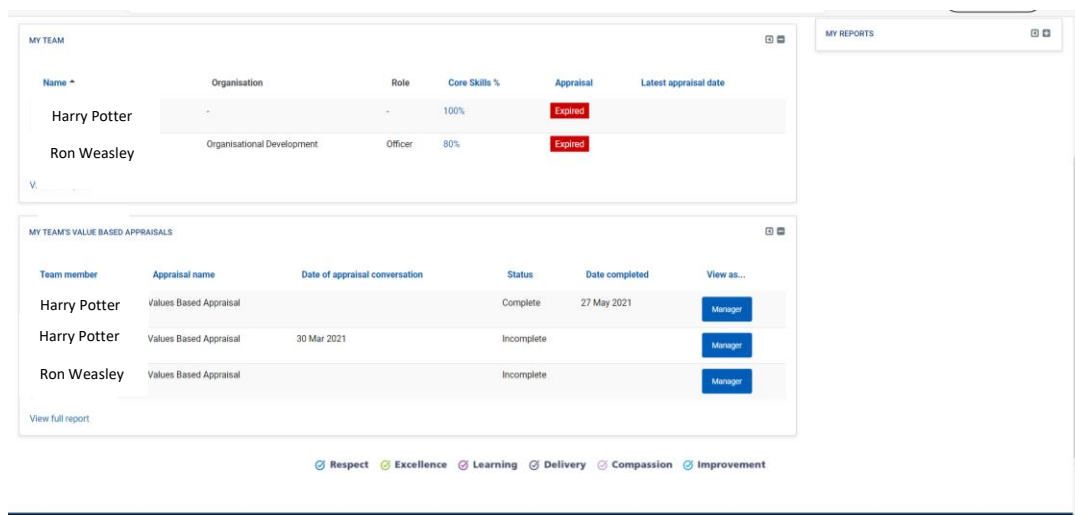
[Save and Return](#) [Complete appraisal](#)

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6. Once you have clicked the 'Complete appraisal' button you will no-longer be able to alter your appraisal. Clicking the button will trigger an email to be sent to your appraiser to notify them.
7. Your appraiser will then need to log into their My Learning Hub account select 'My Team' from the blue navigation bar across the top of their portal.

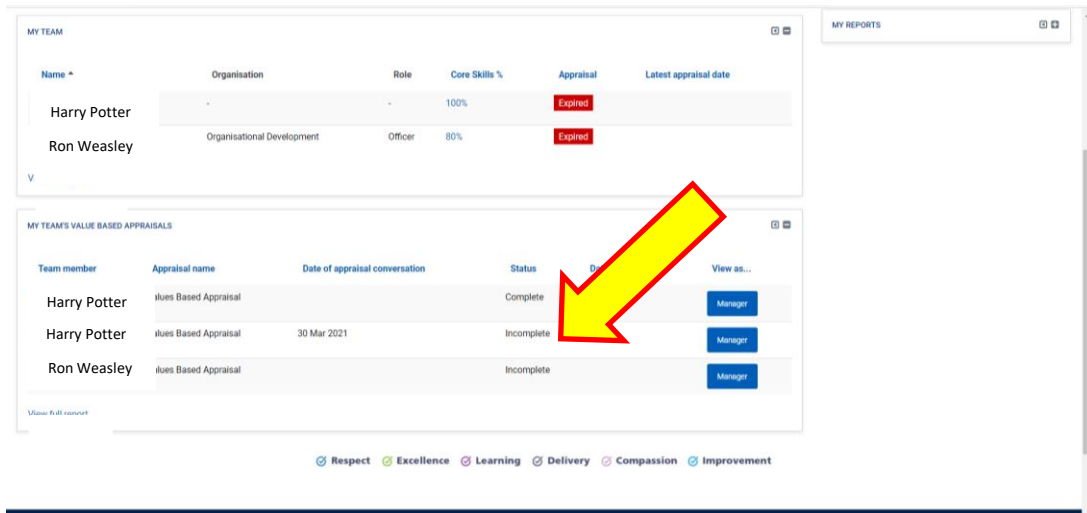


This will open their team dashboard.



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8. Your appraiser will need to scroll down their dashboard to find your record. You may have completed and incomplete records. Completed records are your appraisals from previous occasions. Your incomplete record is the appraisal you are currently working on.



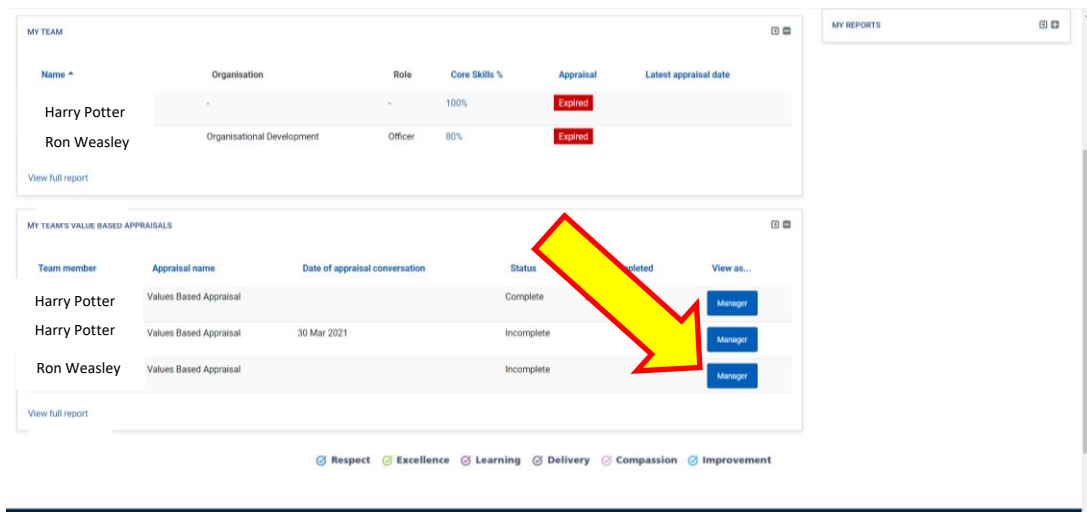
The screenshot shows the 'MY TEAM' dashboard. It contains two tables. The first table, 'MY TEAM', lists team members with columns for Name, Organisation, Role, Core Skills %, Appraisal, and Latest appraisal date. The second table, 'MY TEAM'S VALUE BASED APPRAISALS', lists appraisals with columns for Team member, Appraisal name, Date of appraisal conversation, Status, and a 'Manager' button. A yellow arrow points to the 'Manager' button for the 'Incomplete' record of Harry Potter.

Name	Organisation	Role	Core Skills %	Appraisal	Latest appraisal date
Harry Potter	-	-	100%	Expired	
Ron Weasley	Organisational Development	Officer	80%	Expired	

Team member	Appraisal name	Date of appraisal conversation	Status	Manager
Harry Potter	Values Based Appraisal		Complete	Manager
Harry Potter	Values Based Appraisal	30 Mar 2021	Incomplete	Manager
Ron Weasley	Values Based Appraisal		Incomplete	Manager

9. Your appraiser can then click the 'Manager' button for your current appraisal, to move to the next page.



This screenshot is identical to the one above, showing the 'MY TEAM' dashboard. A yellow arrow points to the 'Manager' button for the 'Incomplete' record of Harry Potter.

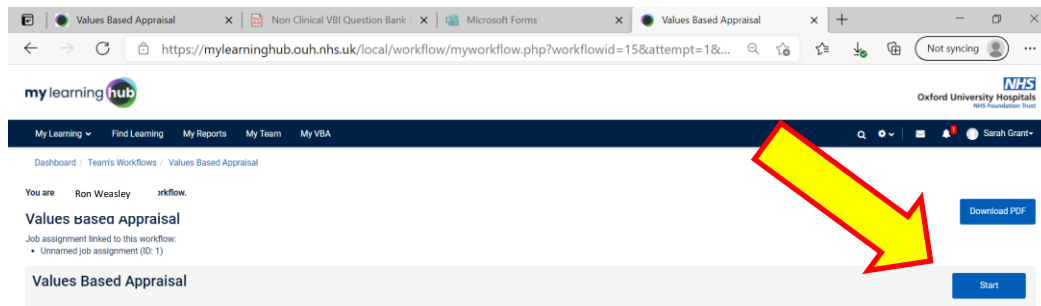
Name	Organisation	Role	Core Skills %	Appraisal	Latest appraisal date
Harry Potter	-	-	100%	Expired	
Ron Weasley	Organisational Development	Officer	80%	Expired	

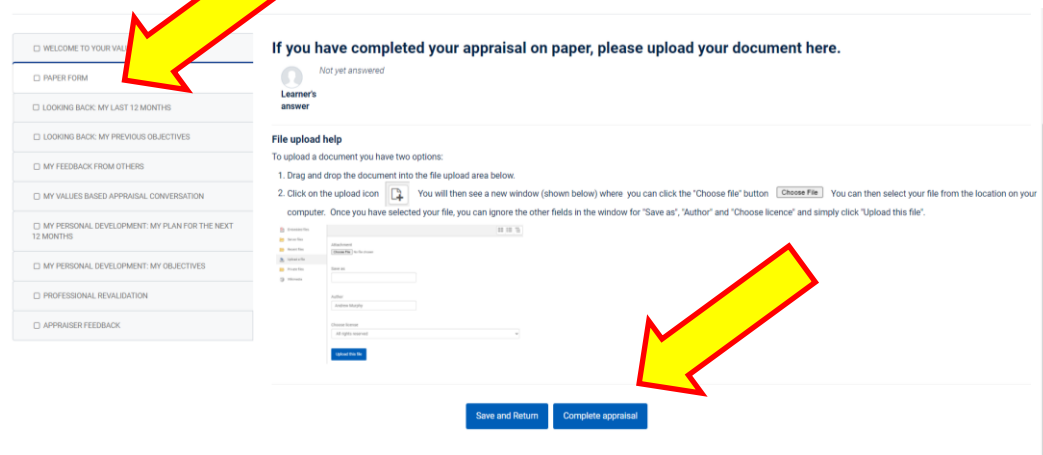
Team member	Appraisal name	Date of appraisal conversation	Status	Manager
Harry Potter	Values Based Appraisal		Complete	Manager
Harry Potter	Values Based Appraisal	30 Mar 2021	Incomplete	Manager
Ron Weasley	Values Based Appraisal		Incomplete	Manager

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10. Your line manager will then need to click on the 'Start' button to view your appraisal.



11. Your line manager will then need to navigate to the 'Paper Form' tab where they can view any documents that you have uploaded. Once they click the 'Complete appraisal' button your appraisal will be finalised and recorded as complete within the system.

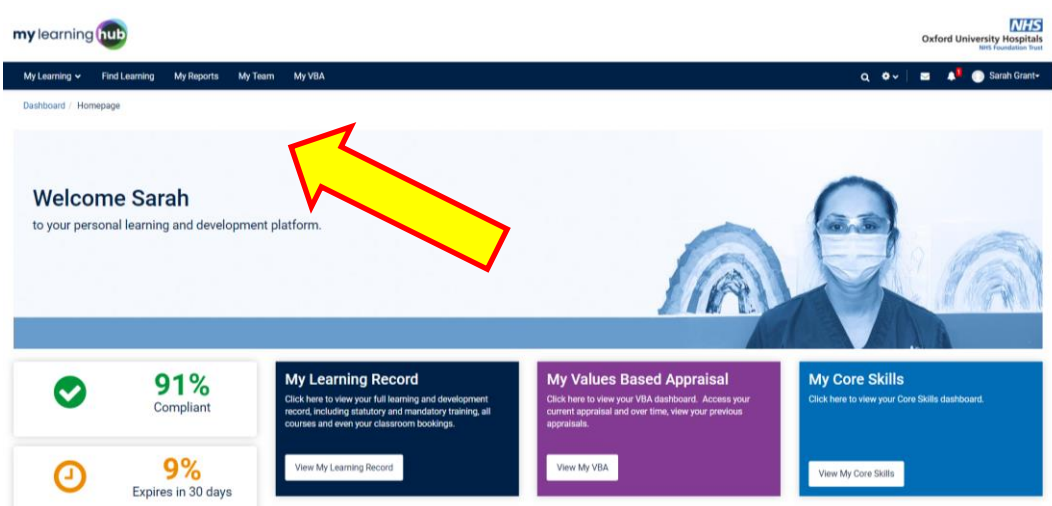


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## Section 3: Recording an Appraisal that has been conducted using a paper form as the line manager.

1. As the line manager you will be able to access your teams' appraisals by logging in to your My Learning Hub account and clicking on the 'My Team' button on the blue navigation bar at the top of your portal.



This will open your team dashboard.

The screenshot shows the 'MY TEAM' dashboard. It contains a table with columns: Name, Organisation, Role, Core Skills %, Appraisal, and Latest appraisal date. Below this is a section for 'MY TEAM'S VALUE BASED APPRAISALS' with columns: Team member, Appraisal name, Date of appraisal conversation, Status, Date completed, and View as... The table lists appraisals for Harry Potter and Ron Weasley. At the bottom, there is a row of icons representing the organization's values: Respect, Excellence, Learning, Delivery, Compassion, and Improvement.

Name	Organisation	Role	Core Skills %	Appraisal	Latest appraisal date
Harry Potter	-	-	100%	Expired	
Ron Weasley	Organisational Development	Officer	80%	Expired	

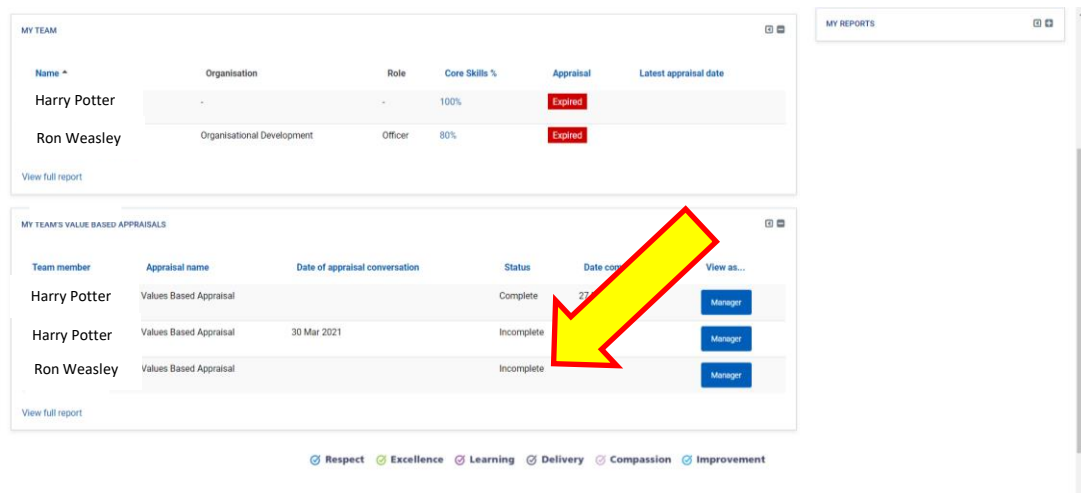
Team member	Appraisal name	Date of appraisal conversation	Status	Date completed	View as...
Harry Potter	Values Based Appraisal		Complete	27 May 2021	Manager
Harry Potter	Values Based Appraisal	30 Mar 2021	Incomplete		Manager
Ron Weasley	Values Based Appraisal		Incomplete		Manager

View run reports

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2. Scroll down your dashboard to find the employee record for whom you wish to upload a paper document. There may be completed and incomplete records. Completed records are appraisals from previous occasions. The incomplete record is the appraisal is currently being worked on.



The screenshot shows the 'MY TEAM' dashboard. The top section, 'MY TEAM', lists employees: Harry Potter (100% Core Skills, Expired Appraisal) and Ron Weasley (80% Core Skills, Expired Appraisal). The bottom section, 'MY TEAM'S VALUE BASED APPRAISALS', lists appraisals for Harry Potter and Ron Weasley. A yellow arrow points to the 'Manager' button for the incomplete appraisal of Harry Potter.

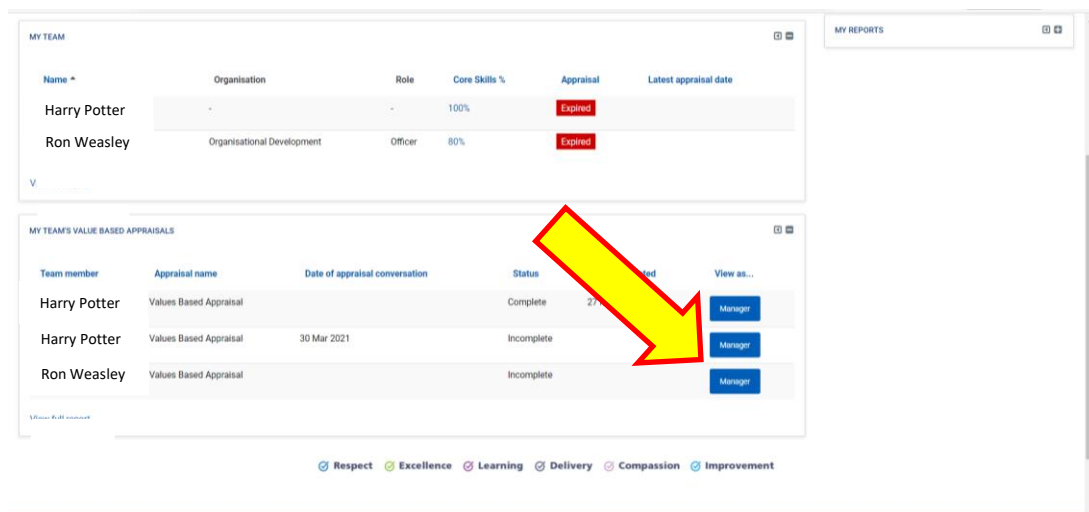
Name	Organisation	Role	Core Skills %	Appraisal	Latest appraisal date
Harry Potter	-	-	100%	Expired	
Ron Weasley	Organisational Development	Officer	80%	Expired	

Team member	Appraisal name	Date of appraisal conversation	Status	Date completed	View as...
Harry Potter	Values Based Appraisal		Complete	27/03/2021	Manager
Harry Potter	Values Based Appraisal	30 Mar 2021	Incomplete		Manager
Ron Weasley	Values Based Appraisal		Incomplete		Manager

Respect Excellence Learning Delivery Compassion Improvement

12. You can then click the 'Manager' button for your current appraisal, to move to the next page.



The screenshot shows the 'MY TEAM' dashboard. The top section, 'MY TEAM', lists employees: Harry Potter (100% Core Skills, Expired Appraisal) and Ron Weasley (80% Core Skills, Expired Appraisal). The bottom section, 'MY TEAM'S VALUE BASED APPRAISALS', lists appraisals for Harry Potter and Ron Weasley. A yellow arrow points to the 'Manager' button for the incomplete appraisal of Harry Potter.

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Team member	Appraisal name	Date of appraisal conversation	Status	Date completed	View as...
Harry Potter	Values Based Appraisal		Complete	27/03/2021	Manager
Harry Potter	Values Based Appraisal	30 Mar 2021	Incomplete		Manager
Ron Weasley	Values Based Appraisal		Incomplete		Manager

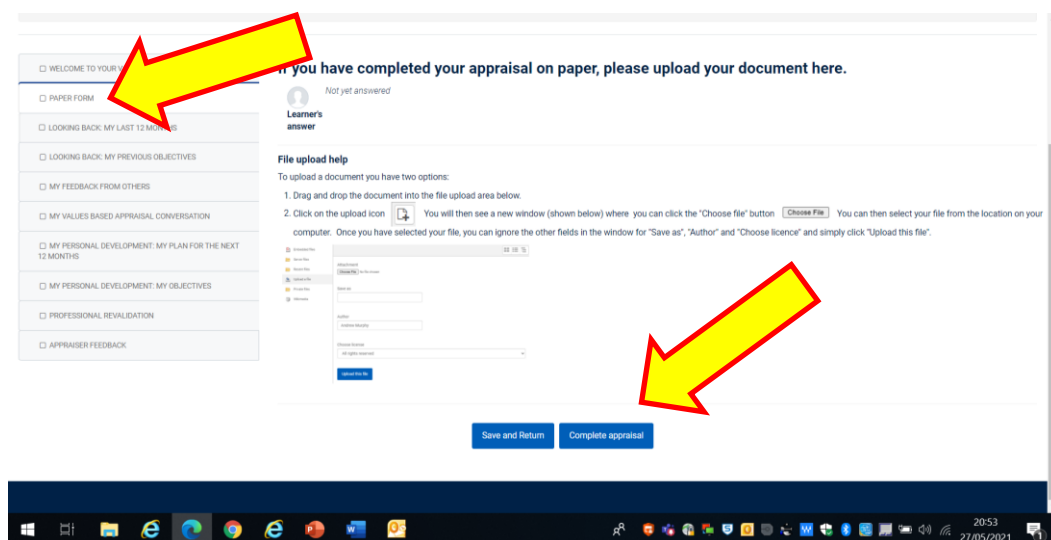
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13. You will then need to click on the 'Start' button to view the appraisal.



14. You will need to navigate to the 'Paper Form' tab. Here you can follow the on screen instructions to upload the paper based appraisal form. Once you have done this, scroll to the bottom of the page and click the 'Complete appraisal' button to finalise the appraisal and recorded it as complete within the system.



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