

Managing Appraisals

Manage appraisals

Totara Learn provides an appraisal form builder to allow an administrator to create custom appraisal forms and assign the forms to groups of people within their organisation. Typically the appraisal process takes place over a specific time-frame, so administrators can define specific 'Stages' during which certain actions must be completed. It is also possible to notify participants that actions are required or are overdue.

Appraisal forms are managed site-wide by going to *Site administration > Appraisals > Manage appraisals*.

An overview of existing appraisals will be displayed, including the name, start date, number of learners assigned, status of the appraisal, and a series of options to edit, copy, delete, or activate the appraisal.

Name	Start	Assigned	Status	Options
Annual appraisal		0.0 completed	Draft	🔍 ⚙️
Sample appraisal		0.0 completed	Draft	🔍 ⚙️



The number displayed in the 'Learners' column have a different meaning depending on the appraisal status.

- **Draft:** Contains the number of currently assigned users.
- **Active:** Contains the number of assigned users who haven't yet completed the appraisal.
- **Closed:** Contains the total number of users who have been assigned at any point while the appraisal was active.

Appraisal activation

Once an appraisal has been populated with stages, questions and roles, and users have been assigned to the appraisal, it must be activated for appraisees to access and complete the form.

By default, no notifications are sent out upon activation, however you can define emails to be sent out by creating an 'assignee gains access to the appraisal' event within the [Appraisal Notifications](#) area.

All assigned appraisees will receive this notification via email alerting them to the appraisal activation. Appraisees added to an activated [Dynamic appraisal](#) will be sent the appraisal activation notification when assigned.

Activation email recipients and multiple job assignments

The appraisee's manager (and their manager's manager and appraiser) may also receive activation notifications. The point at which the manager receives the notification is dependent on the multiple job assignment setting within the [Advanced Features](#) area.

When appraisees are assigned to the appraisal their nominated manager receives the notification as per the following:

- If multiple job settings are *disabled*, then the appraisee will have one manager who will receive the activation notification at the same time as the appraisee.
- If multiple job settings are *enabled*, then only the appraisee receives the activation notification initially. Once the appraisee has viewed the appraisal and selected their relevant job assignment, the activation messages will be sent to the appraisee's manager.

Modify an appraisal

Existing appraisals can be modified until they have been activated and made available to users.

To modify an existing appraisal, select the **Settings** (pencil icon) button under the **Options** column.

To duplicate an appraisal, including all of the stages, pages, and elements, select the **Copy** button. A cloned copy of the appraisal will appear that you can update.

Unlocking an appraisal

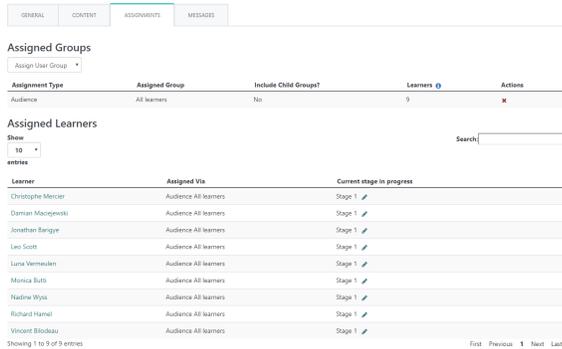
On this page



The Totara Academy has a whole course dedicated to using [Appraisals](#) in Totara Learn.

Users assigned a role with the 'totara/appraisal:unlockstages' capability, can unlock and reopen previously closed stages for a specific appraisee for one or all roles, and for any stage of the appraisal form.

Under the **Assignments** tab of the selected Appraisal form, select the corresponding **Edit** icon () under the **Edit current stage** column.



Assigned Groups

Assignment Type	Assigned Group	Include Child Groups?	Learners	Actions
Audience	All learners	No	9	

Assigned Learners

Learner	Assigned Via	Current stage in progress
Christophe Mercier	Audience - All learners	Stage 1 
Damian Maciejewski	Audience - All learners	Stage 1 
Jonathan Bangier	Audience - All learners	Stage 1 
Leo Scott	Audience - All learners	Stage 1 
Luna Vermeulen	Audience - All learners	Stage 1 
Monica Buti	Audience - All learners	Stage 1 
Nadine Wypsi	Audience - All learners	Stage 1 
Richard Hamal	Audience - All learners	Stage 1 
Vincent Bilodeau	Audience - All learners	Stage 1 

In the **Edit current stage** screen, select the required individual listed under **Role/user to change** or select **All roles**. Use the **Set current stage to** dropdown menu to unlock the required section for the selected role(s). Choose **Save changes** to unlock the specified stage for the selected user(s) or **Cancel** to return to the Assignments tab home screen.

Edit current stage

Appraisal Annual appraisal

Learner Christophe Mercier

Role / user to change

All roles 

All roles

Learner - Christophe Mercier

Manager - Vincent Bilodeau

Set current stage to

Apply Cancel

Unlocking stages will not delete any of the users' answers - instead users will be able to view and edit previous responses.

You may want to only unlock an appraisal for a single user, or for all users. If you are unlocking an appraisal for a single user, then each stage will not require other users to recomplete the stage. For example:

- Stage 1 requires Manager and Learner input
- Stage 2 requires Learner input
- Stage 3 requires Manager and Learner input

If stage three was completed and you then unlocked back to stage one for the Manager, the Manager would need to make their changes and complete stage one again. Once they complete stage one the appraisal would immediately skip to stage three, as stage two does not require any Manager input. If you choose to unlock the appraisal for **All roles**, each user will need to complete each stage again, even for stages they do not need to amend.

 It is important to note that new notifications will not be generated when using this feature. Therefore this feature should **not** be used to re-do appraisals - instead it should only be used to fix mistakes, when involved users are aware that they need to recomplete a stage (or stages).

Close an appraisal

If an activated appraisal needs to be removed from the users assigned for some reason, it can be closed. This means that users do not need to complete the appraisal and will stop receiving notifications about it. After an appraisal is closed, it can also be deleted using the **Delete** button under the *Options* column.

The **Activate** link in an activated appraisal turns into a *Close* link. Note that the delete button is greyed out because an active appraisal cannot be deleted.

1. Select the **Close** link to end the appraisal. The number of users who have not completed the appraisal will be displayed.
2. Check **Send alert to affected users** if users should receive a notification that the appraisal is being closed.
3. Enter an **Alert title** which will be the subject line of the email notification users receive. This will also be the line that appears on the user's dashboard alerts.
4. Enter an **Alert body** which will be the body of the email notification users receive. This will also be available if the user clicks the information icon in the dashboard alerts area to get more detail on the notification.
5. Click the **Close appraisal** button.

Close appraisal

9 users have not yet completed this appraisal. Closing will prevent them continuing with their appraisal. This cannot be undone.

Send alert to affected users



Alert title

Appraisal "Annual appraisal" has been closed.

Alert body

An administrator has closed your appraisal "Annual appraisal".
You no longer need to complete this appraisal.

Close appraisal

Cancel