

Annual Appraisal Preparation and Conversation Pack

A practical companion to Appraisal, Revalidation and the Professional Portfolio.

- ✓ Six task-specific planning stages
- ✓ A worked example and guided writing space
- ✓ Matching accessible webpage and primary sources

Prepared for SAS, locally employed and other UK doctors

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Purpose and boundaries

Use this pack to prepare a focused annual conversation, check the written output and turn agreed development into action. Local systems and submission timetables differ. Use actual local instructions rather than treating the sequence below as a national deadline.

Use neutral planning notes. Do not record names, GMC numbers, identifiable cases, health details, confidential employer material or private document links here. The website is not an approved appraisal record. Entries in the webpage stay in the open page and are not saved automatically. Store completed downloads securely and transfer appropriate information to your approved system.

Worked example: a fictional planning situation

A doctor approaches appraisal with a large folder but no agenda. On review, the most useful issues are a change in clinical scope, an unfinished objective that depended on access to supervised practice and a recurring communication theme in feedback. They prepare a concise account of each, distinguish learning from the employer support still needed, and ask to agree a realistic next plan. The output records the discussion and actions without suggesting that the appraiser has authorised a new clinical scope.

1. Confirm arrangements early

Check the appraiser, date, approved system, submission timetable and expected declarations. Ask about adjustments or a conflict of interest before the meeting. If access or evidence is delayed, describe the problem promptly and agree the next step instead of silently missing the timetable.

What arrangements are confirmed and what needs clarification?

What preparation or accessibility support should be requested?

2. Review the previous PDP

For each objective, explain what was done, what was learned, what changed and what remains open. An objective may need revision because the role changed or support was unavailable. Discuss that transparently rather than marking it complete because a course was attended.

Which objectives show learning or application, and how?

Which objectives need revision or further support, and why?

3. Check scope and evidence

Review the role map and six supporting-information categories over the appropriate periods. Complete the required declarations through the approved system. Separate evidence that exists from planned activity and check that the submission is proportionate and appropriately anonymised.

What scope change or evidence gap should be made clear?

What confidentiality or accuracy check is needed before submission?

4. Set the conversation agenda

Choose a small set of issues that would benefit from discussion: a learning theme, a challenge, a professional success, a development need or a support barrier. Do not use appraisal as a substitute for urgent patient-safety action, occupational-health advice or an employment process.

What would make this conversation useful to you?

Which issue needs a separate route as well as, or before, appraisal?

5. Agree a realistic plan

Develop objectives with a clear need, intended learning or change, method, support, evidence and review. Distinguish what you can do from what another person or organisation must approve. Avoid recording an employer resource commitment as agreed when it has not been authorised.

What proposed objective and support dependency should be discussed?

How will the learning and its application be reviewed?

6. Check and follow through

Read the written summary and PDP using the local process. Raise factual inaccuracies promptly and clarify wording that could imply unsupported conclusions. Keep the approved output and organise follow-up. The completed appraisal is part of revalidation, not the GMC decision itself.

What will you check in the written output?

What action will you take after the meeting and when will you review it?

Review the plan before using it

Check that the notes describe what is known, what remains uncertain and what someone still needs to agree. A completed field does not prove approval, competence or revalidation readiness. Keep official correspondence and actual deadlines separate from illustrative planning dates. Seek appropriate advice where an individual decision or a licence may be affected.

What is the next action, who needs to agree it and when will you review progress?

Sources and related learning

Editorial source review: 9 September 2026. The links below are primary sources; publication dates vary. Current official guidance and approved local arrangements take priority. This is independent education, not a GMC-endorsed form or individual advice.

[GMC: revalidation requirements for doctors — UK](#)

[GMC: supporting information and declarations — UK](#)

[GMC: continuing professional development — UK](#)

[GMC: the revalidation decision — UK](#)

[Return to the Appraisal, Revalidation and Professional Portfolio programme.](#)

Accessible HTML edition: <https://sasdoctors.com/resources/worksheets/annual-appraisal-preparation-pack>