Guide to completing
Performance Appraisal Form

Reviewing Past Performance
(for past review period)

Step 1: Employee assesses own performance

Self-Assessment Instructions

Section A: Employee reviews each of the performance factors and their descriptions and selects a rating for each of the performance factors that they believe reflects their performance over the past review period.

Performance Factors		Rating Scale
1. Client/Resident Focused	5. Documentation and Practices	§ exceptional performance
2. Communication and Collaboration	6. Supports a Safe Culture	§ exceeds expectations
3. Clinical / Technical Expertise	7. Supports a Just Culture	§ meets expectations
4. Accountability	8. Leadership / Assisting Others	§ needs improvement
		§ unsatisfactory

Employee comments/provide examples of how they demonstrated the values of Care, Compassion, and Commitment and on their attendance and reliability over the past review period.

Section B: Employee will provide examples of strengths demonstrated over the past review period and areas that can be improved upon for upcoming review period.

Section C: Employee will begin to focus on upcoming review period, identifying 2-3 development goals that will assist them in supporting the unit, department, division, and/or the organization overall. These goals will be finalized with the manager during the performance management meeting.

Once employee completes Sections A, B, and C, the employee selects "Save and Submit" and the form will be electronically sent to their manager.

Step 2 – Manager rates employee on performance factors

Section A: Manager reviews the performance factors/descriptions and determines the appropriate rating for each of the performance factors based on the employee's performance over the past review period. Manager provides comments in each of the respective sections of the form.

Step 3 – Manager and employee meet to discuss performance appraisal

Manager schedules a 30-minute meeting with the employee to discuss employee performance over the last review period and the information in the appraisal form.

Setting Goals and Objectives
(for upcoming review period)
To be completed after reviewing / discussing past performance

Section C: During the meeting and following the review of past performance, the employee and manager will finalize the 2-3 development goals that are the most important priorities for the employee to focus on for the upcoming review period. Development goals should *support the goals of the unit, department, division, and/or the organization overall.*

The "Objectives" section of the form can be left blank for now. This section can be used to document future discussions between the employee and their manager regarding progress on goal attainment and / or regarding any changes to the original goals.

During the next review period, objectives can be added/deleted/or amended.

Example of an objective:

Objectives

Objective	% Complete	Target Date	Actual Date	
Complete mandatory learning by end of 2nd quarter	0	2019-12-15 00:00:00		% ✔ 🗑 💬

Add objective

Overall Comments and Finalizing the Appraisal Form
To be completed after performance appraisal and goal setting discussion

Section D: Manager and employee have the option to provide overall comments/responses to the performance review.

Once performance appraisal has been finalized (no further information to be added), Manager will lock form. Note: once the form is 'locked', it can be viewed by the employee and the manager but <u>cannot </u>be amended.

Questions regarding the performance appraisal process can be directed to the Coordinator Recruitment & Retention: webbl@tbh.net 346-5219 or the Manager Recruitment & Retention: uptonk@tbh.net 346-5240.

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