

# 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 feel 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

**Section B:** Employee comments on how they aligned with SJCG Mission, Vision, and Values and comment on their attendance and reliability over the past review period.

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

**Section D:** Employee will begin to focus on next review period, listing 2-3 development goals that will significantly benefit the employee's 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, C, and D, 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 and their 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 and the information in the appraisal form.

## Setting Goals and Objectives

(for next review period)

*To be completed after reviewing / discussing past performance*

Section D is used to document 2-3 development goals that are the most important priorities for the employee for the upcoming review period. Achievement of these goals by the employee will *significantly benefit the employee's unit, department, division, and/or the organization overall.*

During the meeting between the employee and the manager and following the review of past performance, the employee and manager will finalize the 2-3 goals for the employee to accomplish over the upcoming review period.

The "Objectives" section of the form is left blank for now, but 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

*To be completed after performance appraisal and goal setting discussion*

**Section E:** 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 form is 'locked', the form can be viewed but **can not** be amended.