**[ORGANIZATION NAME]**

**PERFORMANCE EVALUATION FOR 3 MONTHS/ANNUALLY**

**NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_JOB TITLE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DATE OF HIRE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE OF LAST EVALUATION:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Using the specific requirements of the job description, review and consider the following factors regarding the performance of the above individual and circle the number beside the*

*statement which most accurately describes their performance since their last evaluation or initial hire date.*

1. **INTERPERSONAL SKILLS/ATTITUDE**: Reflects ability to work with others and the way the staff

member interacts with other staff and or patients on a day-to-day basis. Manner in which

he/she reacts to supervisors, co-workers, patients, volunteers and reaction to constructive

criticism.

(1) Works poorly with others. Frequently grumbles about policy, others, work assignments.

Reacts negatively to constructive criticism. May include several complaints from patients

about their communication skills or attitude with them. Inappropriately verbalizes

feelings/tone is unacceptable. Displays dislike for position.

(2) Attitude, cooperation and interpersonal skills need improvement. Is occasionally

uncooperative and displays poor attitude. Has difficulty dealing with others at times.

Voice/tone is sometimes unacceptable. Sometimes displays dislike for position or does

not accept constructive criticism well.

(3) Works compatibly with others. Usually has a good attitude and is cooperative.

Voice/tone is acceptable. Does not display dislike for position, handles const. criticism ok.

(4) Works well with others. Is cooperative and helpful. Shows respect for supervisors.

Voice/tone is pleasant. Displays enjoyment of position. Accepts constructive criticism

well and changes behavior accordingly.

(5) Excellent attitude, courteous, mature, professional. Goes out of way to establish and

maintain good rapport with co-workers, volunteers, and patients. Is always respectful

to supervisors. Is helpful to assist/teach others. Serves as role model for appropriate

behavior to fellow staff members. Always has pleasant voice/tone. Enthusiastic about

position. Accepts constructive criticism and changes behavior immediately

**COMMENTS:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. **QUALITY/QUANTITY OF WORK**: Consider ability to produce reliable work. Evaluate the

number of errors, thoroughness, judgment, knowledge of job and how these impact

patient care and other staff members. Consider volume of work performed during a

given time period, energy level, capacity and stamina.

(1) Work is frequently unacceptable. Requires continual supervision and direction. Is not

dependable. May make careless errors on a regular basis. Is listless, easily distracted.

Performs below job expectations and does not complete a sufficient amount of work.

Poor multi-tasking skills. Constantly making errors

(2) Makes occasional careless errors. Requires more than average supervision. Needs to

be reminded to perform assigned daily tasks. Produces below capacity. Appears to

lack energy at times or willingness to produce. Does not always use time wisely. Has

problems identifying priorities. Lacking in skills to multi-task. Makes a lot of errors.

(3) Work is usually accurate, acceptable, reliable. Usually sees a need and meets it without

needing urging from a supervisor, even if not assigned to that area of the clinic at that

time. Produces satisfactory amount of work. Completes work assignments. Uses time

wisely, is flexible and identifies appropriate priorities. Able to multi-task. Makes some

errors.

(4) Work is consistently accurate, neat, and thorough. Is dependable. Good to see a need

and meet it even if not part of their current assignment. Occasionally produces

more work than expected. Uses time wisely. Has above average energy level, capacity,

and stamina. Helps others. Can regularly multi-task. Errors are few and far between.

(5) Work is outstanding, precise and consistently meets/exceeds established standards.

Takes pride in work. Consistently exceeds work expectations and looks for needs in the

clinic without prompting of a supervisor. Amount of work exceeds expectations. Is

energetic and always willing to help others. Great at multi-tasking. Rarely if ever makes

errors.

**COMMENTS:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PAGE 2**

3. **TECHNICAL SKILLS/COMPREHENSION**: Consider the technical competence and/or overall

knowledge of job, procedures, duties, and functions within the standards required for the

position, as well as, the ability to apply those skills. Consider ability to grasp instructions and

scope of position with regard to understanding technical aspects, theory, policy and

procedures.

(1) Does not have acceptable working knowledge and skills of job. Cannot comprehend

effectively or in a timely manner.

(2) Job knowledge and/or technical skills are limited. Continually needs instruction and

training. Slow to comprehend, requires more than average instruction time.

(3) Has sufficient knowledge and technical skills to perform the job. Has average ability to

comprehend technical aspects, theory, policy and procedure for the position.

(4) Maintains and utilizes more than adequate technical skills, knowledge and

understanding of job position. Better than average comprehension skills.

(5) Maintains and utilizes thorough knowledge and skills for the technical aspects of the job.

Has excellent understanding of job position. Skills are outstanding. Exceptional ability

to grasp, learn, comprehend and apply skills for position.

**COMMENTS**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. **ATTENDANCE/TARDINESS**: Consider number of unplanned absences, sick days, and

tardiness since last evaluation period in regards to what is the expected norm. Consider

whether staff person contacts appropriate supervisor. Consider whether enough notice

is given when absent/late. Consider if employee consistently works 40/hr week.

(1) Regularly absent or tardy without good/acceptable cause and frequently uses excessive

sick days (>3 days in 6 months). Does not always notify supervisor appropriately.

Works < 40 h./ week often.

(2) Frequently absent or late without good/acceptable cause or uses excessive sick days

(> 3 days in 6 months). “Usually” notifies supervisor appropriately. Works<40 hr./ wk.

at times.

(3) Some absences or tardiness but with good/acceptable cause. Uses annual leave

appropriately with advanced notice/authorization of supervisor. Sick days do not

exceed 3 days in 6 months period. Notifies supervisor appropriately. Works 40 hr/wk.

**PAGE 3**

(4) Rarely absent or tardy. Always notifies supervisor when going to be late or absent.

Always uses annual leave appropriately with advanced notice/authorization of

supervisor. Sick days are within expected norm of 3 days in 6 months. Works 40 hr./wk.

(5) No tardiness or unscheduled use of annual leave since last evaluation. Sick days

days are within or less than expected norm of 3 days in 6 months. Always notifies

supervisor appropriately. Always work 40 hr./week.

**COMMENTS**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. **DOCUMENTATION**: Consider employees ability to accurately and effectively document

aspects of patient care or assigned tasks Consider employees use of [EHR] system when

documenting as appropriate if clinical or written abilities if office/clerical.

(1) Poor documentation skills. Does not appropriately or accurately document in

[EHR] (includes scheduler/specialty clinics documentation) if clinical.

(2) Lacks effective documentation skills at times. Does not always use [EHR]

system appropriately (includes scheduler/specialty clinic documentation) if clinical.

(3) Acceptable documentation skills. Uses [EHR] system appropriately (includes

the scheduler/specialty clinic documentation) if clinical.

(4) Effective documentation skills that are consistently accurate/timely/appropriate.

Uses [EHR] system appropriately, including the scheduler/specialty clinics

documentation) if clinical.

(5) Effective and superior documentation skills. Always uses [EHR] system

appropriately, including scheduler/specialty clinic documentation if clinical.

**COMMENTS**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PAGE 4+**

6. **ENVIRONMENTAL SAFETY**: Consider application of universal precautions, OSHA standards,

and methods that affect safety of self, co-workers, patients and volunteers.

(1) Does not follow safety procedures and is careless of safety of self/others.

(2) Occasionally fails to observe and/or use universal precautions, OSHA standards.

(example: not wearing gloves when appropriate).

(3) Adequately follows universal precautions, OSHA standards, and safety policies.

(4) Routinely practices all applicable safety precautions (universal precautions/OSHA).

(5) Exercises great care for personal safety and that of co-workers, patients and

volunteers. Always follows universal precautions and OSHA standards.

**COMMENTS**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. **PROFESSIONALISM**: Consider employee’s overall demeanor, interaction with patients, co-workers, volunteers, and supervisors. Consider ability to act as patient advocate and secure

assistance for patient through other means.

(1) Does not display professional demeanor. Is not able to advocate for patients.

(2) Does not always display a professional demeanor. Patient advocate skills are

lacking.

(3) Is professional. Is able to help advocate for patients.

(4) Displays professional demeanor on a regular basis. Has good patient advocate skills.

(5) Outstanding professional demeanor. Excellent patient advocate skills.

**COMMENTS**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PAGE 5**

**OVERALL RATING: TOTAL SCORE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_TOTAL POSSIBLE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**WELL AVOVE POSTION CRITERIA/EXCELLENT (32-35)**

**ABOVE POSITION CRITERIA/GOOD (27-31)**

**MEETS AVERAGE POSITION CRITERIA/AVERAGE (21-26)**

**DOES NOT MEET POSITION CRITERIA/BELOW AVERAGE (15-20)**

**WELL BELOW POSITION CRITERIA/WELL BELOW AVERAGE (<15)**

**\*\*If employee overall ranking is below 21, a job improvement plan will be developed and**

**reviewed with employee and attached to this form\*\***

**CEO:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**CLINICAL COORDINATOR:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**OTHER SUPERVISOR (IF INDICATED):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**My signature verifies that my evaluator has discussed this evaluation with me, as well as,**

**a job improvement plan, if indicated above. My signature does not necessarily signify that**

**I agree with this evaluation.**

**COMMENTS:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**EMPLOYEE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SALARY INFORMATION: CURRENT:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**NO CHANGE/ RE-EVALUATE IN\_\_\_\_\_\_\_\_\_\_\_ MONTHS.**

**INCREASE TO:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_EFFECTIVE DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PAGE 6**