

Guideline for Quarterly Meetings	
January	Check-in on competencies/goals established September 1.
April	Check in on September 1 competencies/goals and introduce strategic objectives for next year
July	Check in on current competencies/goals and establish goals to begin on September 1
October	Close out competencies/goals for previous year. Check in on competencies/goals that began September 1.

Goal Assessment Scale

Apply these criteria to your employees annual goals. Select the definition that best describes the progress of the goal. Please note that assessments are progressive. For example all elements of a 3 must be satisfied before rating a goal with an assessment of a 4. Evidence for your assessment must be documented in the quarterly check in.

Project Progress Score	Operational Definition of Goal Progress Score
0-Goal Identified	A goal has been identified and agreed to between the employee and manager/supervisor
1-Pre-work completed	Background on how to accomplish the goal has been completed, but no specific work on the goal has been accomplished.
2-Planning for the goal has begun	Organization of project structure has begun (such as: what resources or other support will likely be needed, where will focus first, tools/materials needed gathered, meeting schedule developed).
3-Activity, but no progress	Initial work has begun (project planning, measurement, data collection, obtaining baseline data, study of processes, surveys, etc.).
4-Project progress ≤10%	Project goal has a measure established to track progress. Measures are is graphically displayed with targets included.
5-Modest progress 11-25%	Some work has been completed for some components of the goal. Anecdotal evidence of progress exists.
6-Progress 26-50%	Work continues and additional tasks have been completed in support of the goal
7-Significant Progress 51-75%	A significant number of tasks in support of the goal have been completed. The goal is more than 50% achieved.
8-Significant Progress 76-90%	Preparation for completing the goal has begun, identification of key tasks necessary to complete goal and progress on those tasks are being worked on
9-Near completion 91-<100%	The goal is not complete and there are only 1 or two minor tasks that need to be accomplished in order for goal completion to occur.
10 - Meets Minimum expectations	The goal was completed and the results meet minimum expectations for work product
11 - Better than minimum expectations	The goal was completed and employee completed the project at better than minimum expectations.
12 - Partially exceeded expectations	The goal was completed and while better than minimum did not quite exceed expectations, may have exceeded in one area but not in all areas.
13- Exceed Expectations	The goal was completed and the results and how the results were achieved exceeded expectations in all areas.
14 - Partially Exceptional	Better than exceed and clear area where improvement could be made to reach exceptional
15-Exceptional	The goal was completed and there is clear evidence that the results of this goal and the methods in which this goal were achieved were exceptional performance.

Rating Scale

Exceptional	Frequently exceeds expectations. Work performance consistently and considerable above expectations. Performance includes flexibility, creativity, innovation, and unusual accomplishments. EE exhibits pride and adds value to the community, department or profession outside normal job requirements. EE's judgment, resourcefulness and depth of knowledge are of the highest quality. EE exhibits a positive, problem solving, and action-oriented focus with particular emphasis on customer satisfaction. EE provides exceptional enhancement to the Agency in terms of service, goals and outcomes. EE can be relied upon to seek out supervision. EE is a mentor in showing others how to exceed expectations and is recognized by others as being exceptional. EE supports nurtures and encourages others to stretch. Success of a team is more important than individual success.
Exceeds	Performance exceeds expectations. Employee demonstrates a great deal of pride and initiative and makes significant contributions in achieving objectives and outcomes. Supervision is minimal. Employee is proactive in anticipating and responding to the needs of the customer. Employee demonstrates leadership in team activities and serves as a model, teacher and coach to other employees. Employee takes an active role in positively influencing change.
Meets	EE meets expectations of the job and adds value to the organization. Performance is consistent and at a level of any qualified and experienced employee performing the same duties. Normal level of supervision is required. Employee demonstrates customer focus by their willingness to meet customer needs.
Does Not Meet	Performance falls below expectations. Efforts have been made by the supervisor/manager to work with the employee to correct performance problems. Coaching continues and immediate improvement is necessary.

Employee Name	_____	Badge #	_____
Position	_____		
Department	_____		
Annual Review Due	_____		
Performance Period	_____	TO	_____

Does not Demonstrate = 1	Developing = 2	Proficient = 3	Highly Skilled = 4	Advanced = 5
The employee frequently performs below the level expected of this position in all or almost all key aspects of the competency. Knowledge, skills and abilities observed are below Agency standards and clearly unacceptable. Immediate and sustained improvement is required.	The employee demonstrates adequate performance in most areas, but needs improvement in one or more significant aspects that are critical to the competency. Knowledge, skills, and abilities observed require improvement in one or more areas to meet expectations.	The employee consistently demonstrates capable, or satisfactory, performance. Both what is produced and how it is produced meet Agency standards and expectations of the competency. The employee is a dependable, competent, knowledgeable individual who meets and occasionally exceeds expectations. This rating conveys solid, effective performance.	The employee demonstrates strong, consistent performance in the competency. Both what is produced and how it is produced meet and often exceed Agency standards and expectations of the competency. Results add value beyond the scope of the current role, often benefiting the Agency. This employee is often sought out by others for counsel and assistance.	The employee regularly demonstrates superior performance. Both what is produced and how it is produced far exceed Agency standards and expectations of the competency. The employee is extraordinarily competent and productive. Performance at this level occurs throughout the year and across all key aspects of the competency. Proactively seeks out other to share, teach, and apply their skills, and is widely recognized as a role model.

**CORE COMPETENCIES**

Standard of Performance					
January	April	July	End of Year		
			5	Work Habits	Demonstrates personal accountability, professionalism, integrity, and ethical behavior; appropriately prioritizes specific tasks or objectives to ensure completion; and engages in and drives organizational purpose.
			5	Self-Awareness	Manages own behaviors and recognizes impact on work and relationships. Receives feedback in a constructive manner; leverages strengths while seeking opportunities for development; demonstrates accountability and integrity; manages a healthy work/life balance.
			5	Relationships	Develops and maintains effective networks with stakeholders; relates well to diverse populations and is receptive to the needs of others in different situations; demonstrates interpersonal awareness and the ability to challenge assumptions to resolve conflicts, build trust, and foster collaboration.
			5	Communication	Demonstrates ability to express ideas, convey thoughts, and develop concepts clearly in written, oral, and electronic formats. Uses correct and appropriate grammar, sentence organization, and structure; includes appropriately directed and timely interactions resulting in correct understanding of intended messages.
			5	Adaptability	Demonstrate innovative methods to solve problems; drives change; maintains effectiveness when managing multiple priorities; and adjusts work style when faced with diverse environments.
			5	Service Oriented	Demonstrates commitment to discovering, meeting, and delivering on the needs of all stakeholders (includes patient, internal/external individuals, customers, groups, or organizations.)

Enter areas you want the employee to improve upon along with any training they are interested in for the Performance Review period.

<b>SECTION: DEVELOPMENT PLAN</b>
Strengths
Development Areas

Career Aspirations
Potential Next Role
Development Actions

**SECTION: ANNUAL ATTESTATIONS**

<p>Agency's Corporate Compliance Program and the HIPAA Privacy Laws ...          This annual review period is also a time to confirm my understanding of the Agency's Corporate Compliance Program and the HIPAA Privacy laws.          • To report a Corporate Compliance issue, contact Medic's Compliance Director in Human Resources or the Helpline at 1-888-540-7247.          • To report a HIPAA issue, contact Medic's Privacy Officer in Human Resources or the Customer Care Line at 704-355-8363.</p>	
<p>Charges, Convictions or Sanctions Policy ...          This section is a reminder of our Charges, Convictions or Sanctions Policy (Chapter 1) found on our Extranet under Policies. "Any employee charged with or convicted of, a felony or any misdemeanor involving violence, injury to another person, communicating threats, destruction of property, sexual offenses, drugs, DWI, theft or fraud including fraudulent checks shall report such charge immediately to his/her supervisor. Also employees who drive Agency vehicles must report to their supervisor any moving violation or conviction involving a traffic violation where points are placed against their driving record and/or a conviction resulting in a suspension or revocation of their driving privilege"</p>	
<p>Employment Policies &amp; Procedures ...          My initials below affirm my awareness of the employment policies and procedures that are available to me electronically on the Agency's Extranet. I also understand my supervisor and/or a representative of the Human Resources Department can assist me with any questions that I may have.</p>	
<p>I have reviewed my job description and I understand all my job duties and responsibilities. I am able to perform the essential functions as outlined. I understand that my job may change on a temporary or regular basis according to the needs of my department without it being specifically included in the job description. If I have any questions about job duties not specified on the job description that I am asked to perform, I must discuss them with my immediate supervisor or a member of the Human Resources staff.</p>	
<p>Medic's Standards of Behavior ...          My initials below affirm my review of Medic's Standards of Behavior and my agreement to abide by those standards. I understand the Standards of Behavior are available to view on the Agency's Extranet.</p>	
<p>My initials confirm that I have read, understand and agree to all the above policies and to abide by Medic's Standards of Behavior.</p>	

Goal Value	not scored ---	not started 0 points	Partially Completed 1-9 points	Complete 10-15 points	Total
Goal 1 Results	0	0	0	0	15
Goal 2 Results	0	0	0	0	15
Goal 3 Results	0	0	0	0	15

Goal point values are between 0-15 (per goal) Please enter value rating for each goal.

Goal Details	<b>GOAL #1</b>				
January	Date:		Goal Progression Value =	<input type="text"/>	
April	Date:		Goal Progression Value =	<input type="text"/>	
July	Date:		Goal Progression Value =	<input type="text"/>	
Final Check-in Year	Date:		Goal Progression Value =	<input type="text" value="15"/>	

Goal Details	<b>GOAL #2</b>				
	<b>Goal Name:</b>				
January	Date:		Goal Progression Value =	<input type="text"/>	
April	Date:		Goal Progression Value =	<input type="text"/>	
July	Date:		Goal Progression Value =	<input type="text"/>	
Final Check-in Year	Date:		Goal Progression Value =	<input type="text" value="15"/>	

Goal Details	<b>GOAL #3</b>				
	<b>Goal Name:</b>				
January	Date:		Goal Progression Value =	<input type="text"/>	
April	Date:		Goal Progression Value =	<input type="text"/>	
July	Date:		Goal Progression Value =	<input type="text"/>	
Final Check-in Year	Date:		Goal Progression Value =	<input type="text" value="15"/>	

**EMPLOYEE COMMENT SECTION**

What is your opinion about this performance review in relation to accuracy, comprehensiveness and helpfulness?

What are your needs, which can be met by training?

What do you consider your strengths?

Other Comments:

**OPTIONAL**

What, in your opinion, are the opportunities for growth within your present position or outside your present location?

What are your career objectives with Medic?

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

Employee Name _____	Badge # _____
Position _____	Department _____
Performance Period _____	Annual Review Due _____

YEAR END SCORE	Did Employee Have Goals?	Points Achieved
<b>Performance Goals</b> (enter YES if the goals section is completed) →	Yes	13.5
<b>Core Competencies</b>		21.0
<b>Annual Requirements</b>		
<b>Total Score</b>		34.5

<b>DISCIPLINARY ACTIONS</b>	
<b>Actions listed below will impact maximum increase:</b>	<b>Starting Increase</b>
Decision Day, Involuntary Demotion, and/or Definitive 1 Audit	0%
Disciplinary Action Level II or more than 1 Level I	1.75%

<b>SECTION: PERFORMANCE INCREASE INFORMATION</b>			
Current Hourly Rate	_____		
Current OT Rate	_____		
Current Biweekly Rate	_____		
Current Annual Salary	_____		
<b>Overall Performance Rating:</b>	<b>Range</b>	<b>Competencies With Goals</b>	<b>Competencies Only</b>
Exceptional	3.75%	32 to 35	27 to 30
Exceeds Expectations	2.75%	25 to 31	22 to 26
Meets Expectations	1.75%	19 to 24	16 to 21
Does Not Meet Expectations	0.00%	6 to 18	5 to 15

<b>PERFORMANCE RATING:</b>	<b>Exceptional</b>
Percent of Increase	_____
New Hourly Rate	_____
New OT Rate	_____
New Biweekly Rate	_____
New Annual Salary	_____
Cash Merit	_____
Retro Amount	_____

Supervisor/Manager Support of Applied Rating (Using the definitions listed above provide support for the rating you selected for your employee)

*Managers: if you have rated your employee as EXCEPTIONAL please detail (using either the job description, goals or projects - in any combination) three examples of exceptional work performance.*

  
  
  
  

_____	0	_____
Manager/Supervisor Name	Employee Name	Date
_____	_____	_____
Signature	Signature	Date:
_____	_____	_____
Department Manager Name	Signature	Date:

Goal Details	<b>SECTION: PERFORMANCE GOALS</b>
	<b>GOAL #1</b>
	<b>Goal Name:</b>

Goal Details	<b>SECTION: PERFORMANCE GOALS</b>
	<b>GOAL #2</b>
	<b>Goal Name:</b>

Goal Details	<b>SECTION: PERFORMANCE GOALS</b>
	<b>GOAL #3</b>
	<b>Goal Name:</b>