

# How to Deliver an Effective Performance Appraisal

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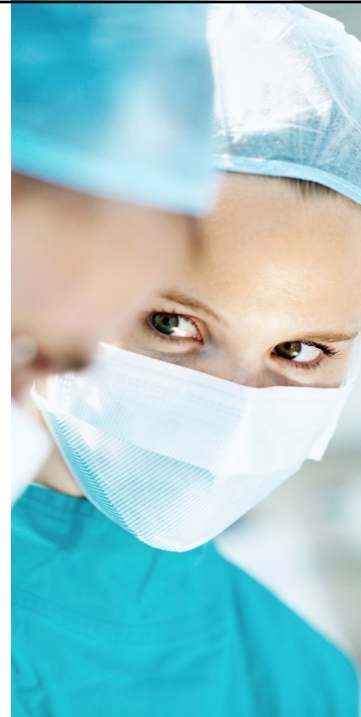
## Missed Opportunity



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## The value. (when done well)

- Manage/elevate performance
- Align employee goals/priorities with facility goals/priorities
- Documentation trail crucial to HR management



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## Use a Competency Based Job Description as the foundation



Competency based job descriptions add consistency and standardization to the entire employee lifecycle by identifying the knowledge, skills and behaviors needed to perform a job successfully and evaluate current performance.



Skills



Knowledge



Behavior



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## Example of Notes to Files

### Notes to Files: Shelly Smith

- **1/15/21** | 25 min late without communication
- **2/6/21** | SS noted we are almost out of juice boxes and offered to pick some up for tomorrow
- **4/15/21** | SS was complimented by 5 pts in Q1 pt satisfaction surveys
- **4/26/21** | SS developed a game for education day to test staff knowledge for upcoming resurvey
- **5/15/21** | SS met with new surgeon to coordinate pre and post op orders, discharge instructions, etc. The new surgeon was very complimentary about her clarity, organization and professionalism

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Back up your ratings with specifics.



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## Examples of performance Appraisal comments

Competency	Score	Comments
Expresses self clearly verbally and in writing	3	Dr. M complimented her clarity while orienting him to our ASC
Facilitates actions and activities that support accountability to practice	3	Prepared and executed game on education day to expand staff knowledge of our facility and protocols



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Avoid  
Superlatives.

**"Always"**

**"Best"**

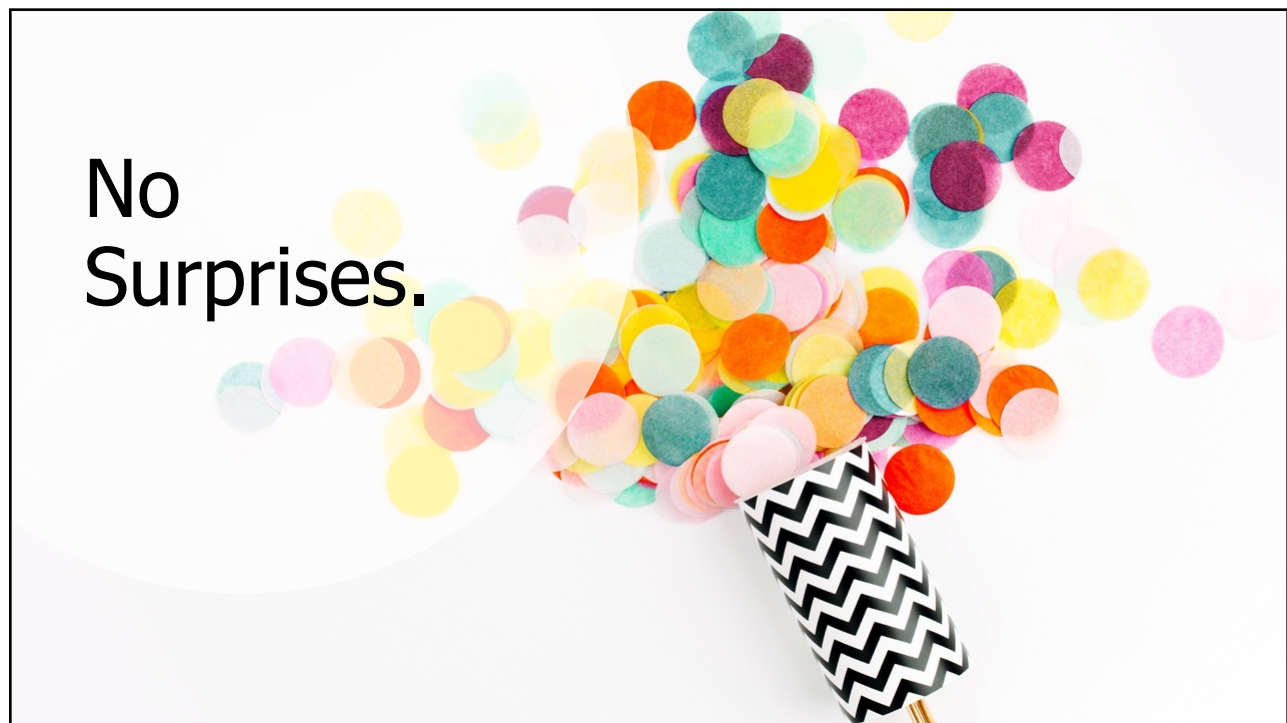
**"Worst"**

**"Never"**

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## Performance Appraisal Timing

**90 days** into employment

end of  
“probationary  
period”



**Extend** as  
needed



**Annually**

within the  
anniversary month



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## Goals and Objectives

- S** SMART Use action words
- M** MEASURABLE Use metrics or data targets
- A** ACHIEVABLE Be realistic
- R** RELEVANT Tie the relevance of their job scope to ASC performance
- T** TIME-BOUND Specific date or time frame



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## Goals and Objectives

Continue to grow and develop in materials management role

VS

- Create a contact list in excel that includes all vendors, service/product, primary contact, phone, and email by 8/15/2021
- Complete system online tutorials on purchasing and inventory management by 9/1/2021
- Review item master for accuracy and make corrections before next physical inventory 12/31/21
- Seek out an education and training opportunity in materials management and submit for approval within the coming anniversary year.



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# Employee Wage and Benefit Statement

## ABC Surgery Center ANNUAL EMPLOYEE STATEMENT

<b>Shelly Smith</b> , Surgical Tech	<b>Hire Date:</b> 3/2/15	<b>Start rate:</b> \$27/hr
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### CURRENT COMPENSATION AND BENEFIT PACKAGE

<b>Hourly rate/Salary:</b>	\$32.00 (16%↑)	\$66,560.00
<b>Paid holidays:</b>	7	\$1,792.00
<b>PTO:</b>	3 weeks	\$3,840.00
<b>Health Insurance:</b>	\$353.60	\$4,243.20
<b>401K match:</b>	\$69.32	\$1,802.50
		<b>\$78,237.70</b>

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## In Summary



- Commit to timely and meaningful performance assessments
- Maintain notes to file to provide specific behavioral examples to support your ratings
- Avoid superlatives and surprises
- Use top ratings sparingly
- Provide SMART goals
- Consider incorporating and Employee Wage and Benefit Statement into your annual process

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# Available on eSupport



## Compliance/Policy & Procedure Update/Human Resources



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### P&P: HUMAN RESOURCES

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#### JOB DESCRIPTIONS

- ☐ Administrator Job Description
- ☐ Charge Nurse Job Description
- ☐ Clinical Director Job Description
- ☐ Infection Coordinator Job Description
- ☐ Medical Records Clerk Job Description
- ☐ OSHA Coordinator Job Description
- ☐ QAPI Coordinator/Risk Management Coordinator Job Description
- ☐ Surgical Technologist Job Description
- ☐ Description of Physical Demands

#### COMPETENCIES

- ☐ Clinical Director Competency (for annual performance appraisal)
- ☐ Competency Assessment - Conscious Sedation
- ☐ Housekeeper Competency (for annual performance appraisal)
- ☐ Operating Room RN Competency (for annual performance appraisal)
- ☐ Pre-Op/PACU RN Competency (for annual performance appraisal)
- ☐ Surgical Tech Competency (for annual performance appraisal)

#### OTHER

- ☐ Employee Confidentiality Statement

SEARCH

#### POLICY AND PROCEDURE UPDATE


- Overview
- Recent Updates
- COVID-19
- Administration
- Anesthesia/Medication Management
- HIPAA
- Human Resources
- Infection Control
- Nursing
- OSHA
- QAPI
- Safety

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# Thank You

## Contact Us!


Need assistance with ASC compliance or operations? We can help.



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Upcoming Webinars

DATE		CE	WEBINAR TOPIC	SPEAKER
August 20	60 min	RN, CASC	Problem Employees   How to Manage, How to Win	Abtin Mehdizadegan
September 27	20 min		Customer Service in the ASC   Enhancing the Patient Experience	Laurie Brown
October 29	60 min	RN, CASC	Active Shooter	Tonya Wagner
November 29	20 min		Annual Survey Watch Report	Vanessa Sindell
December 17	60 min	RN, CASC	Credentialing Review	Crissy Benze

[www.ProgressiveSurgicalSolutions.com/webinars](http://www.ProgressiveSurgicalSolutions.com/webinars)


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