

Staff Evaluation Form Technical Instructions



May 2006

Performance Evaluation Instruction Guide

- ❑ The next series of slides will instruct you on how to complete the evaluation forms for staff members.
- ❑ Go grab a cup of coffee, make yourself comfortable and follow along.



Most effective way to use this guide

- ❑ Close all programs except MS Word and this PowerPoint document.
 - This includes email and internet!
- ❑ Open the PowerPoint instruction guide.
 - If you are here, you already have the PowerPoint instruction guide open!
- ❑ Open the Evaluation Form that you saved on your computer.
- ❑ You can “toggle” between the 2 documents by pressing the “alt” key and the “tab” key
 - This will allow you to try the features as they are explained.

Where do I find the Evaluation Forms?

- Forms are located on the MCHRD web site.
Here is the website
- <http://www.med.umich.edu/umhshr/index.htm>
- Go to the website
 - Choose "Forms"
 - Choose "Performance Planning and Evaluation Forms"
 - Choose "Staff form for online use"
 - Choose the "open" command
 - Save to your computer or to your department server
 - Saving to your department server is recommended

What do I do with the form?

- ❑ Save a copy of the staff evaluation form on your computer (or server) from the MCHRD website.
- ❑ This copy will become your template to use for all of your employees.
- ❑ You will need to do a few things to make the form usable for your area.
- ❑ The slides will guide you along.

Forms Toolbar in Microsoft Word

- ❑ To use the forms effectively
 - Open the “Forms” toolbar
 - Don’t panic, we will help you do this!

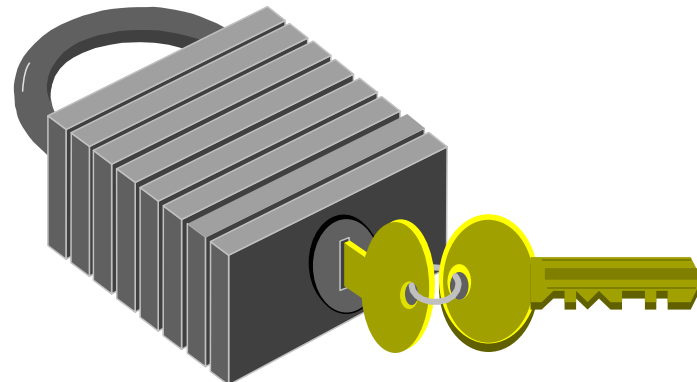


Open Forms Toolbar in Microsoft Word

- ❑ Move your cursor to the top of MS Word
 - This is the gray area at the top and has the words File, Edit, View, etc
 - Move the cursor to "View"
 - "Scroll" down to "toolbars"
 - "Scroll over and down to "Forms" and release the cursor
- ❑ The Forms toolbar has a small lock on the right hand side of the toolbar.
- ❑ You can leave the toolbar on the screen or "drag and drop" to wherever you want it to "live" on the screen.
- ❑ The toolbar should automatically appear each time you open MS Word on the same computer.
 - If you use multiple computers, you will need to do this to each computer.
- ❑ For further assistance, please contact MCIT help at 936-8000.

Using the Forms Toolbar

- ❑ Use the cursor and click on the lock in the toolbar to unprotect or protect the document.
 - Take a moment and practice this in the evaluation template.
- ❑ You will need to unlock the document to add items to the header or footer.
- ❑ You will need to lock the document to take advantage of the features built into the evaluation form.
- ❑ Never use the “erasure” on the tool bar. It will erase all text fields!



Header and Footer

<p style="text-align: center;">UMHS</p> <p style="text-align: center;">STRATEGIC PRINCIPLES</p> <ol style="list-style-type: none"> 1. Integration, Collaboration, Teamwork. 2. Innovation, Adaptation and Prioritization 3. Growth and Investment 4. Taking Care of Our Own 5. Cultural Competency 6. High Value and Fiscal Soundness 7. Integrity and Trust 	 <p>University of Michigan Health System</p>	<p style="text-align: center;">UMHHC GOALS</p> <ol style="list-style-type: none"> 1. Improve clinical outcomes and service. 2. Support the University's health and science academic mission. 3. Improve customer satisfaction in all groups. 4. Create a safe and healthful workplace 5. Enhance our financial strength and competitiveness 6. Participate with state and local partners to create healthy communities
<p>Staff Performance Planning and Evaluation</p>		

Optional – You may add the job title in the header

Not Optional – Complete each item in the footer

<p>PLEASE TYPE OR PRINT INFORMATION</p>				
<p>Staff Member Name</p>	<p>Department Name</p>	<p>Employee ID #</p>	<p>Job Title / Classification</p>	<p>Evaluation Period</p>

Modifications to the Header/Footer

- ❑ Open the document
- ❑ Unlock the template by clicking on the lock in the Forms toolbar
- ❑ Open the “Header and Footer”
 - Same method as you used for opening the “forms” toolbar
 - ❑ “View”
 - ❑ “Header and Footer”
 - The cursor will help you switch between header and footer
 - ❑ Slowly drag your mouse over the options until it shows “Switch between header and footer”

Footer

- ❑ Tab down to the line with name, etc
 - Complete the following
 - ❑ Staff member's full name (no nicknames)
 - ❑ Department name
 - ❑ Employee ID number without spaces or punctuation
 - ❑ Job title/classification
 - ❑ Evaluation Period
- ❑ When you have completed the information, close the header and footer by clicking on the "close" in the header/footer toolbar on your screen.

Job specific expectations are added in this section. List only the most important responsibilities to keep the evaluation succinct and value-added. Use the new rating scale and behaviors as noted earlier. Examples of major responsibilities 12 – 15 below:

UMHHC Performance Expectations Job Specific		
List Key Job Specific Expectations based on the job description. To add rows, copy and paste an entire row. Document must be "unlocked" to add rows. See guide for details.		
Scale: N = Not Met; A = Approaching; S = Solid Performance; E = Exemplary	Self-Evaluation	Manager's Evaluation
11. Attendance: Attends work on a regular basis. Is on time for patient treatment and required meetings. Follows UMHS attendance guidelines.		
12. Develops comprehensive treatment plans based on the goals and modifies as appropriate for the patient populations and ages served.		
13. Teaches patients and families self-management skills for functional activities, exercise, and pain control during and following therapy.		
14. Keeps current in clinical practice by working with and sharing information with team members and through continuing education opportunities.		
15. Completes timely, legible documentation according to established division standards.		
16.		

Job Specific Performance Expectations

- ❑ As a manager, you will need to complete the job specific performance expectations.
- ❑ These job-specific expectations need to relate back to the job descriptions.
- ❑ Choose the key elements of the job description and add them to the template.
- ❑ You can add as many key elements as you need. The document will automatically renumber the rows.

Adding Rows to the Job Specific Expectations

- ❑ Document must be in the “unlocked” mode.
- ❑ Highlight an entire row
 - Move cursor to the left of the row until a small black arrow appears.
 - Left click and the entire row will be highlighted.
- ❑ Copy the row.
 - Many ways to copy using the icons or key commands.
 - Hold the “Ctrl” key and then press the “c” or use the “copy” icon.
- ❑ Paste the row anywhere in the job specific
 - Hold the “Ctrl” key and then press the “v” or use the “paste” icon.
- ❑ The rows will renumber automatically!
- ❑ It is not recommended to use the tab key to add new rows. You will lose the “text” boxes.

Page 3 Modifications

- These are optional to add prior to using the evaluation but may save some time.
 - Type your name in the supervisor box
 - Type in your department name corresponding box.

Typing the **supervisor name** and **department name** may save a bit of time when completing multiple evaluations. If you don't complete ahead of time, you will be able to type in when the document is locked.

Peer /Customer Feedback(Optional): Use this space to capture feedback that is received throughout the year Sources of peer/customer feedback include: <ul style="list-style-type: none"> • Employee survey results • Patient satisfaction survey results • 360 Feedback results • Customer feedback solicited via questionnaire • You're Super Awards • Written feedback (i.e. emails) regarding the individuals performance 				
Feedback Summary:				
Annual Learning and Self-Development Plan: The Learning and Self-Development Plan is used to set personal and professional goals which contribute to the staff member's growth and development. After review of evaluation and peer/customer feedback, identify plan for development. (Examples of developmental opportunities include job-shadowing, coaching, mentoring and training.) Enter all training courses into the M-Learning system. http://mlearning.med.umich.edu/				
1. Growth Area:				
2. Growth Area:				
3. Growth Area:				
Employee Comments: (Optional)				
Date	Employee Signature	Supervisor's Name	Supervisor's Signature	Department
		↓		↓

Overview of modifications

- ❑ Header and Footer – add employee name, Department name, employee ID, job title, & Evaluation Period.
- ❑ PAGE 1 & 4 - No modifications.
- ❑ PAGE 2
 - Input all job specific expectations.
 - These need to mirror key areas of job description.
- ❑ PAGE 3
 - Type in Supervisor's Name & Department Name
- ❑ SAVE your "CUSTOMIZED" document to use as a template for all employees in the same job classification.

Ready to begin writing the evaluation!

- ❑ Lock the document!
- ❑ Note that in the locked mode, you can only type in the gray text boxes.
- ❑ Type in the ratings
 - Rating scale has 4 categories
 - ❑ N = NOT MET
 - ❑ A = APPROACHING
 - ❑ S = SOLID PERFORMANCE
 - ❑ E = EXEMPLARY
 - The MCHRD has descriptions for UMHS Performance Expectations on their website
<http://www.med.umich.edu/umhshr/index.htm>

Document must be in the “Protected” mode to use form effectively!

- ❑ Place the cursor on any of the text field locations.
- ❑ These are “short gray boxes” or any “check box”.
 - On some computers, you may see little circles representing the text fields.
- ❑ Type the “letter” in the self evaluation and manager’s evaluation.
 - **N, A, S, E**
- ❑ Type comments into the summary boxes.
- ❑ Click with the cursor to fill in a checkbox .
- ❑ Tab or move cursor to move to a new text field.

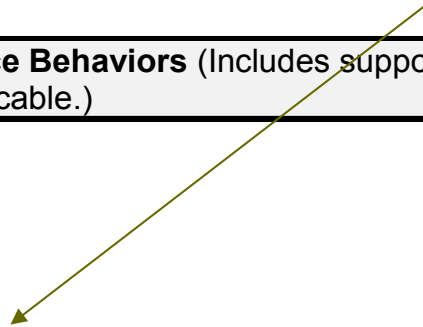
Staff members complete the self-evaluation. Managers complete the manager section. Both use the new rating scale and behaviors found in the Performance Evaluation Rating Descriptions. See website below.

UMHHC Performance Expectations For All Employees		
For behavioral descriptions of performance ratings go to http://www.med.umich.edu/umhshr/index.htm		
Scale: N = Not Met; A = Approaching; S = Solid Performance; E = Exemplary	Self Evaluation	Manager's Evaluation
1. Customer Focus: Relates work and job purpose to UMHHC mission and commitment to putting patients and families first.		
2. Teamwork: Interacts effectively and builds respectful relationships within and between units and among individuals		
3. Communication: Communicates effectively in ways that enhance productivity and builds respectful relationships. Demonstrates active listening, written, verbal, and information technology skills. Shares relevant information		
4. Conflict Resolution: Seeks constructive approaches to resolving workplace issues.		
5. Integrity: Adheres to high standards of personal and professional conduct.		
6. Adapting to Change: Responds positively to change, showing willingness to learn new ways to accomplish work.		
7. Respect for Individuals: Fosters mutual respect and supports UMHS commitment to diversity. Promotes community building and diversity that help employee's learn and respect each other's differences.		
8. Safety: Contributes to a safe and secure environment for patients, visitors, faculty, and staff by following established procedures and protocols as appropriate by job function.		
9. Quality: Adopts practices to improve work processes, enhance customer satisfaction and ensure excellence in daily work.		
10. Efficiency: Adopts practices to accomplish work in ways that maximize productivity and available resources while minimizing waste.		

UMHHC Performance Behavior Summary

This summary area at the bottom of page 1 is to record overall comments relating to UMHHC Performance Expectations 1-10. You may use the corresponding numbers from the expectations where applicable. Use objective examples to support the ratings.

Summary of UMHHC Performance Behaviors (Includes supporting comments and areas requiring further development. Use corresponding number where applicable.)



Job Specific Behavior Summary

This summary area on page 2 is to record job specific comments. You may use the corresponding numbers from the expectations where applicable. Use objective examples to support the ratings above.

Summary of Job Specific Behaviors (Includes supporting comments and areas requiring further development. Use corresponding number where applicable.)



Previous year Learning and Self-Development Plan

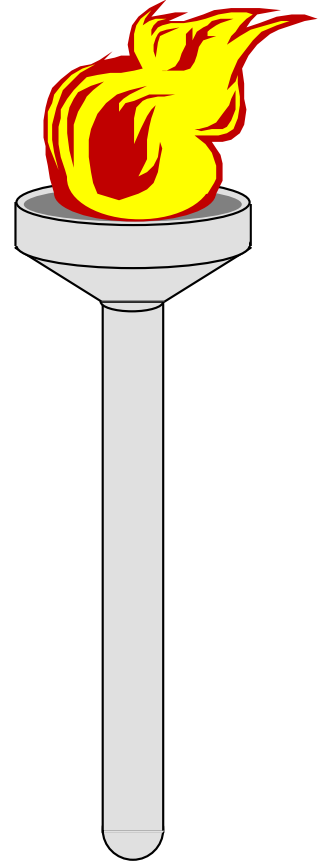
This summary is used to document information relating to last year's growth and development. You can identify the learning modules completed through the M-Learning system using the website <http://mlearning.med.umich.edu>

Previous year Learning and Self-Development Plan Assessment. Refer to the M-Learning system transcript for specific courses and activities completed. <http://mlearning.med.umich.edu/>. List supporting comments and areas requiring further development below.



COMPETENCY / MANDATORY

- ❑ Competencies and Mandatories are recorded in M-Learning.
- ❑ Any competencies/mandatories that are not in M-Learning need to be placed in the competency tab in the blue employee folder.



Overall Summary Statement

The overall summary statement should be a succinct statement about the overall performance. Avoid repeating information from the other summary areas.

Overall Evaluation Summary Statement



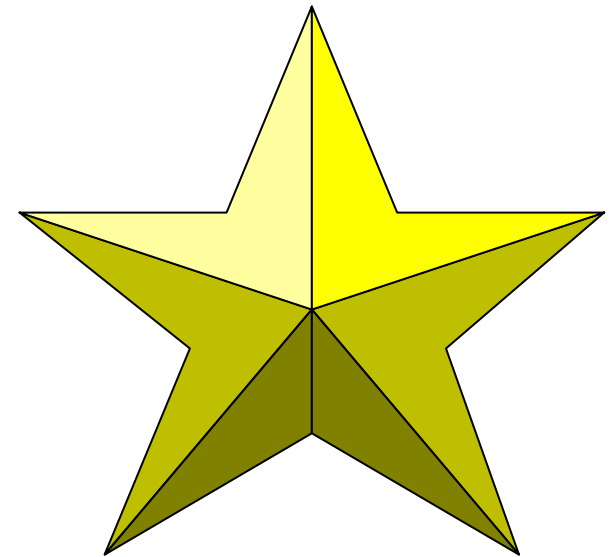
Overall Performance Rating

Enter the performance rating that best matches the ratings used above. Your department may develop guidelines for completion of the ratings based on performance. If the employee is rated as “N” for not met or “A” for approaching, you need to complete the check boxes relating to the deficiencies and the action plan to help the employee achieve “Solid Performance”.

Overall Performance Rating:	N	A	S	E
Scale: N = Not Met; A = Approaching S = Solid Performance E = Exemplary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If “N” or “A” used in the overall rating, check problem area(s) listed below. Identify any action plans for UMHC performance expectations, job specific, or self development areas not listed above.				
<input type="checkbox"/> Job Specific	<input type="checkbox"/> Customer Service	<input type="checkbox"/> Communication	<input type="checkbox"/> Effective team / group work	<input type="checkbox"/> Other:
Action Plan:				

OVERALL PERFORMANCE RATING

- “Solid Performance” and “Exemplary” are the desired levels of performance for all UMHS staff to achieve.
- For staff who are “Not Met” or “Approaching”
 - Check problem area(s)
 - Identify action plan to help the staff member achieve “**S**” or “**E**”
- Information for overall performance ratings will be needed for M-Pathways/PEOPLESOFT



Peer/Customer Feedback

This is an optional section to complete. This is not considered to be part of the overall performance but as a learning tool for the staff member. Note the many sources for peer and customer feedback.

Peer /Customer Feedback(Optional): Use this space to capture feedback that is received throughout the year

Sources of peer/customer feedback include:

- Employee survey results
- Patient satisfaction survey results
- 360 Feedback results
- Customer feedback solicited via questionnaire
- You're Super Awards
- Written feedback (i.e. emails) regarding the individuals performance

Feedback Summary:

Annual Learning and Self-Development Plan

This is just an overview of the key areas that the employee or staff member identifies for growth over the next year. Note that all training courses should be entered into the M-Learning system.

Annual Learning and Self-Development Plan: The Learning and Self-Development Plan is used to set personal and professional goals which contribute to the staff member's growth and development. After review of evaluation and peer/customer feedback, identify plan for development. (Examples of developmental opportunities include job-shadowing, coaching, mentoring and training.) Enter all training courses into the M-Learning system. <http://mlearning.med.umich.edu/>

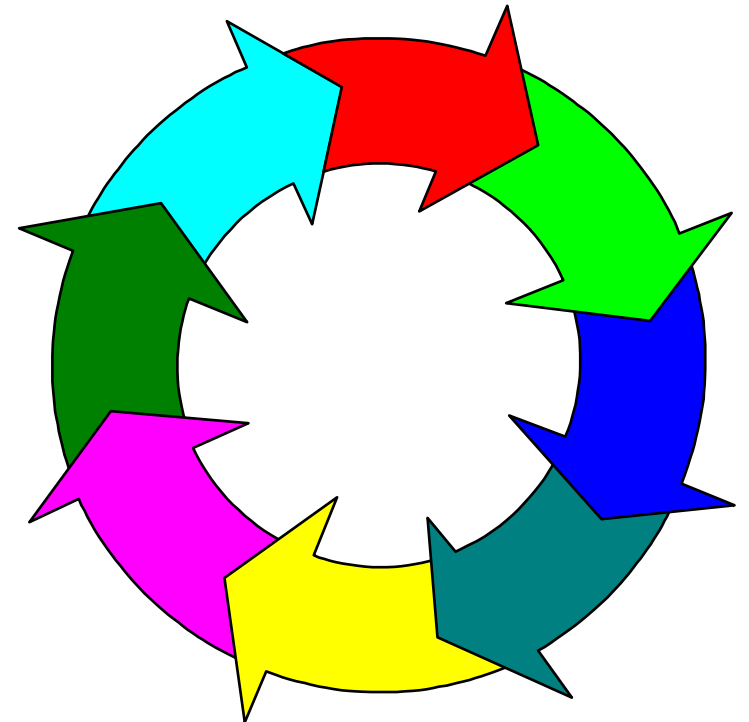
1. **Growth Area:**

2. **Growth Area:**

3. **Growth Area:**

ANNUAL LEARNING

- List overall topics for self-development in the Learning Plan
 - Staff member or supervisor can identify improvement areas.
 - Enter all training courses in M-Learning.



Employee Comments and Signatures

- ❑ The employee may enter comments into this section. The comments can be handwritten or typed into the form.
- ❑ Both the employee and supervisor need to sign the evaluation form.
 - A signature only indicates that the evaluation was reviewed with the employee.
 - It does not indicate that the employee agrees with the evaluation.
 - If an employee refuses to sign the evaluation, document that it was reviewed and the staff member refused to sign.

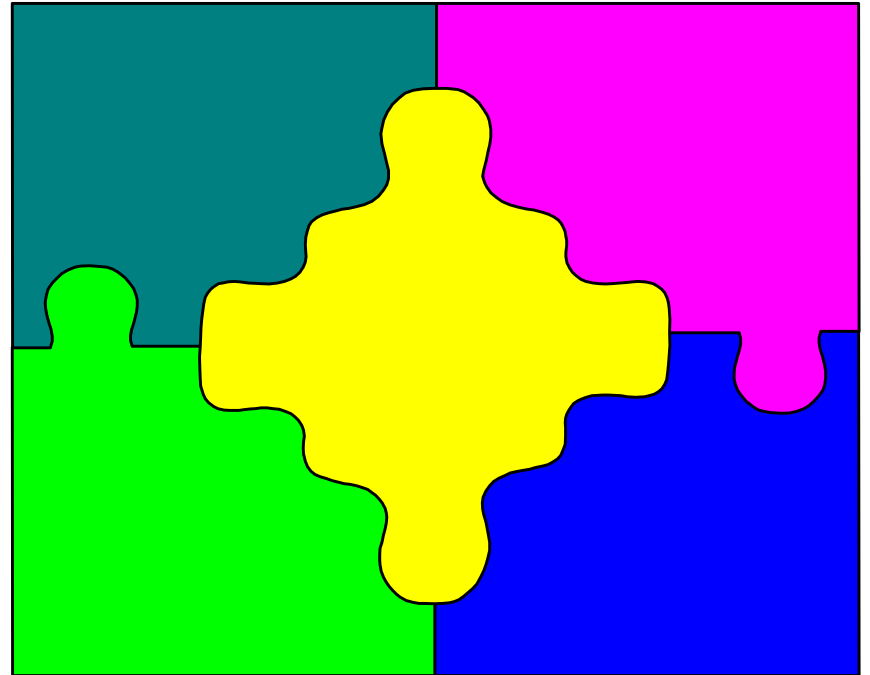
Employee comments and signatures

The employee may enter comments below. The employee and supervisor/manager sign and date the review. Be sure that you typed in the supervisor name and department during the set-up. Otherwise, please complete at this time.

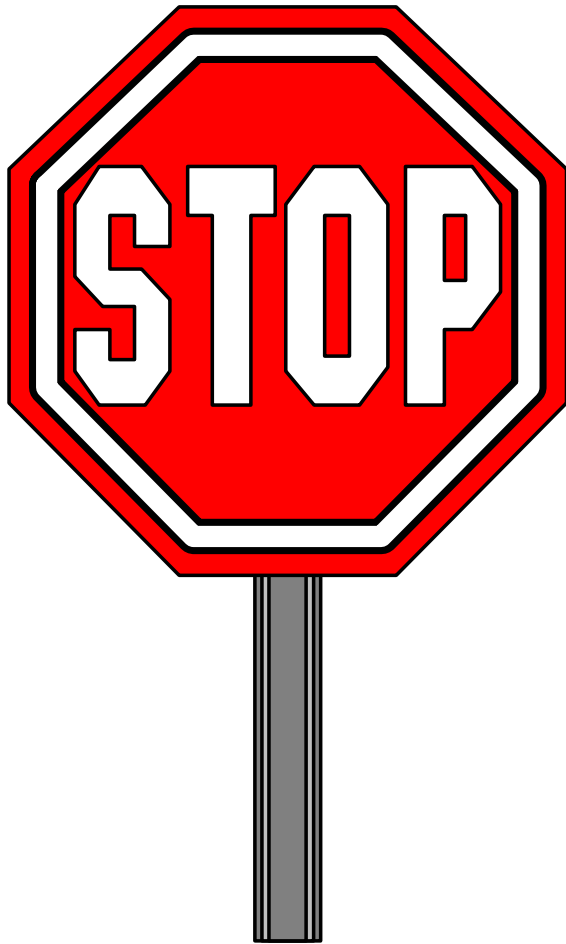
Employee Comments: (Optional)				
Date	Employee Signature	Supervisor's Name	Supervisor's Signature	Department

CONFIDENTIALITY STATEMENT

- ❑ Attached to annual evaluation.
- ❑ Complete annually with evaluation.
- ❑ The confidentiality statement is being revised.
 - Staff members only need to sign one time.
 - If revised, staff member will sign the new version next year!



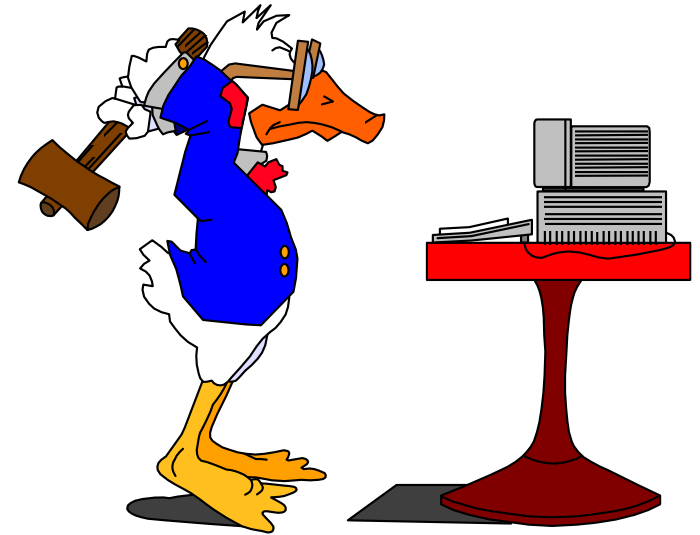
SECTION BREAK



- ❑ The Section Break allows the header and footer to go across all pages.
- ❑ Do not remove the section break!!!
- ❑ If you remove it, you will lose the headers and footers!
- ❑ The section break looks like a double dotted line.
- ❑ It is located at the top of page 1.

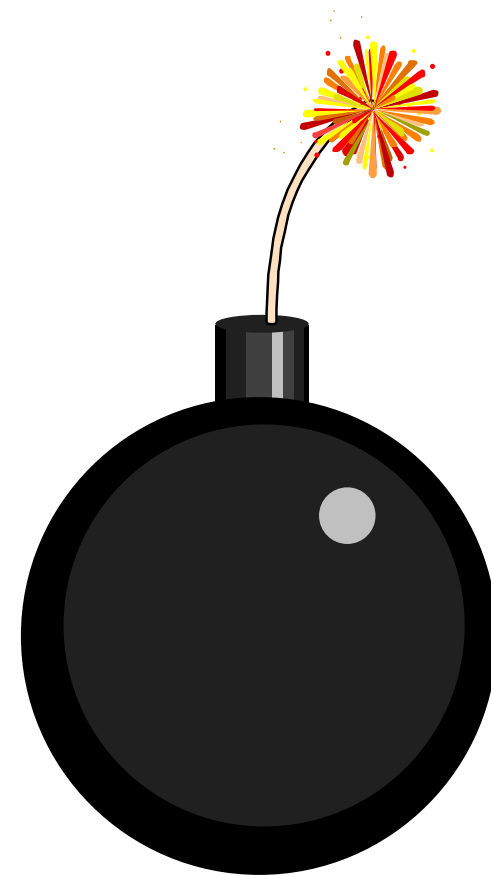
PAGE BREAK

- ❑ The computer will automatically place the “PAGE BREAKs” into the document.
- ❑ It is NOT RECOMMENDED to modify the “AUTOMATIC” Page Breaks.
- ❑ If you decide to modify the automatic page break.
 - The document must be “unlocked”.
 - Would recommend doing this after completing all written comments.



RECOVERY

- ❑ Don't PANIC!
 - If your forget to **LOCK** document and begin to overwrite the text
 - Or accidentally **ERASE** the text fields
- ❑ **EXIT** Microsoft "WORD"
 - **Don't save** the Document
- ❑ **RE-OPEN** the Document
- ❑ You will only lose the parts that were not saved prior to exiting the program.



FEEDBACK AND QUESTIONS

