

# EMPLOYEE PLANNING AND REVIEW FORM

**CURRENT LOCATIONS:** (check all that apply)

- Physical Therapy Office
- Other \_\_\_\_\_

**EMPLOYEE INFORMATION:**

\_\_\_\_\_  
**Name of Employee**

\_\_\_\_\_  
**Post Title**

\_\_\_\_\_  
**Department/Division**

\_\_\_\_\_  
**Date**

**Purpose of Review:**

- 3 months
- 6 months
- Annual
- Other

**SECTION 1: POST DEFINITION**

HATS	STATS	PRODUCTS

## SECTION 2: SKILLS ASSESSMENT: STRENGTHS & WEAKNESSES:

Describe employee's specific skills:

Describe employee's strong points.

Describe areas where the employee must improve or training is needed.

## SECTION 3: TARGETS TO BE OBTAINED

- A. Identified performance standards and targets to be met by mutually agreed upon dates. (*Attach additional pages if necessary*)
  
- B. Describe how to use the management action plan to achieve the weekly objectives which will result in target attainment from listed above. (*with time frames*)
  
- C. List special projects (*in priority*) that have been assigned to the employee for the coming review period

## SECTION 4: EMPLOYEE COMMENTS & SIGNATURES

### COMMENTS:

\_\_\_\_\_  
Employee's Signature  
(*Signature does not imply agreement with contents*)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

**SECTION 4: PERSONAL INTEGRITY APPRAISAL**

<p><b>PROFESSIONAL CONDUCT</b></p>	<p><b>Below Post Requirements</b> Performance was below post requirements in two or more important areas and immediate improvement is required for full understanding.</p> <p style="text-align: center;"><b>0</b></p>	<p><b>Achieved Post Requirements</b> Performance met post requirements in all but one area with extra effort needed in one or more of the following: quality, cooperation, productivity, and initiative.</p> <p style="text-align: center;"><b>1</b></p>	<p><b>Above Post Requirements</b> Performance was just above satisfactory requirements for the post in one or more areas.</p> <p style="text-align: center;"><b>2</b></p>	<p><b>Exceeds Post Requirements</b> Performance exceeds the expectations of all major areas of the post with production and efficiency above and beyond set expectations.</p> <p style="text-align: center;"><b>3</b></p>	<p><b>INSERT NUMERICAL VALUE</b></p> <p style="text-align: center;"><b>(0-3)</b></p>
<p><b>KNOWLEDGE</b> - Consider employee's knowledge in the following areas: post skills, procedures, methods, use of equipment and materials required to execute on post.</p>	<p>Failed to gain understanding of the skills necessary to perform adequately for the post given. Therefore, full post comprehension is insufficient.</p>	<p>Understands, duplicates, and completes post routines without regular assistance but minimal instructions are required to fill in the gaps of missing knowledge.</p>	<p>Knowledgeable and completely understands all aspects of post. Capable of instructing others in post duties when asked.</p>	<p>An authority on all duties and post responsibilities. Knows why post functions are performed and is routinely found enhancing others.</p>	
<p><b>PRODUCTIVITY</b>- Consider the amount of production the individual produces on a weekly/ monthly basis. Assess this according to their post stats and the % of times targets are met throughout this review period. (AVG OF ALL PRIMARY STATS TARGETS MET)</p>	<p>Works at a slower pace than expected and meets deadlines less than 50% of the time. Needs repeated follow-up reminders and help with tasks from others. (STATS TARGETS MET NO MORE THAN 50% OF THE TIME)</p>	<p>Works at a steady pace with no sense of urgency to outperform acceptable standards. Work output definitely meets requirements. All work completed with good quality most often with in deadlines (STATS TARGETS MET BTW 50- 70% OF THE TIME)</p>	<p>Works faster than the average employee. Produces more than most. Work is completed ahead of deadlines a majority of the time. (STATS TARGETS MET BTW 71- 85% OF THE TIME)</p>	<p>Works as an Exceptional producer. Consistently completes work ahead of deadlines with above average quality and will commonly seek out additional work to remain productive above expectations (STATS MET GREATER THAN 85% OF THE TIME)</p>	
<p><b>QUALITY</b>- Consider the accuracy and thoroughness of work completed. Assess work results in terms of rejections, errors correctness and overall neatness of personal work space.</p>	<p>Excessive errors and mistakes that have required work to be redone or done by others. Requires constant oversight to ensure accuracy to avoid rework.</p>	<p>Meets standards for accuracy and neatness. Makes some minor mistakes that are of a tolerable level most often not requiring work to be redone. Still requires spot checking supervision.</p>	<p>Consistently high degree of accuracy and neatness. Work can be relied upon to be done correctly the first time. Seldom needs supervision or by-pass by senior.</p>	<p>Consistently highest level of quality. Final output is virtually perfect 95% of the time or greater. When errors do occur they take it upon themselves to correct it.</p>	
<p><b>INITIATIVE</b>- Consider the degree to which employee is a self-starter that requires minimum supervision. Looks for new and improved methods of completing tasks.</p>	<p>Shows little initiative as evident by rarely volunteering to take on more. Must be told to do a majority of duties.</p>	<p>Voluntarily solves their own post problems and when necessary reaches out several times per month to take on more work. Accepts responsibility for enhancing their area when not asked.</p>	<p>Seeks new tasks and responsibilities. Resourceful in that they search for new methods of doing things. Self-starter on more than 2 instances per month.</p>	<p>Goes out of the way to accept responsibility. Highly resourceful and constructive in new situations. Creative and independent worker looking for improved methods of doing things multiple times/month</p>	
<p><b>COOPERATION</b> Consider the effectiveness of the employee in accomplishing duties by working with others (e.g. peers, supervisors, customers)</p>	<p>Frequently is frustrated and uncooperative when working with others to complete an assigned task. Attitude is unacceptable on at least more than one occasion per month</p>	<p>Generally cooperative to acceptable suggestions and desires comfortable working relationships with others. Seeks to be more of a problem solver and contributes a willingness attitude.</p>	<p>Very cooperative. Usually shows consideration of others' viewpoints. Often offers assistance when not asked. Very approachable with new ideas and tasks.</p>	<p>Always works effectively with others. Shows a keen insight into people. Goes out of their way to be available to help others. Speaks positively about others and is sought after to work with.</p>	
<p><b>DEPENDABILITY</b> Consider the extent to which the employee can be relied upon to take on more work greater than 75% of the time with good results.</p>	<p>Frequently undependable. Often fails to deliver a complete job. Leaves routine tasks incomplete. A majority of the times fails to keep others informed on work status</p>	<p>Can be counted on to complete all aspects of a task once given greater than 80% of the time. Needs minimal supervision and never passes off responsibilities.</p>	<p>Very dependable and persistent despite possible difficulties. Completes normal work and occasional special projects with little supervision.</p>	<p>Highly motivated and trustworthy. Can be counted on to go beyond limits of duties with little or no supervision when needed.</p>	
<p><b>ORDERLINESS</b> Consider the employee's ability to organize work and work area.</p>	<p>Frequently disorganized with work area in disarray. Results in a high degree of lost time and inefficiency. Often requires tasks to be redone.</p>	<p>Work sufficiently organized to allow employee to efficiently perform job. Has a known systematic approach to work showing thought was put into the approach.</p>	<p>Highly organized and efficient worker as evident by tasks always being done ahead of schedule. Always has a system and thought out steps.</p>	<p>Exceptionally precise in organization of work. Has immediate access to anything needed. Extremely efficient without ever missing a deadline and can be counted on to be prepared for issues.</p>	
<p><b>ATTENDANCE</b> Consider the employee's record of being at work regularly and on time.</p>	<p>Unacceptable attendance record. Continual lateness or absences from work.</p>	<p>Occasionally is absent or tardy. Reports absence or tardiness accurately and timely.</p>	<p>Seldom absent or tardy. Always reports absence or tardiness in advance and willing to make up time lost.</p>	<p>Excellent attendance record. Always at work and on time and will put in extra time without needing to be asked.</p>	

**OVERALL RATING DETERMINATION:** Check appropriate box on basis of total points.

Total Points \_\_\_\_\_

Exceeded Job Requirements in all major areas  Exceeded Job Requirements in several important areas  Achieved Job Requirements  Below Job Requirements  
**22-24 points 3% raise                      14-21 points 2% raise                      7-13 points 1% raise                      0-6 points no raise**