



PEAK Performance Evaluation / Job Description

Use the Tab key to move between fields when completing this document online. To maintain document formatting, avoid using the Enter key in fields.

INFORMATION ABOUT YOU

Employee data (Select one): Annual Evaluation 90-day Evaluation Job Description

Today's Date:

Name:

Employee ID:

Job Title: Case Manager

Job Code: 2098

Cost Center: 8306 Dept./Unit: Quality

Supervisor:

Hire Date:

Evaluator:

Review Date:

QUALIFICATIONS/REPORTING

Required minimum education: BSN

Required minimum experience: Required: 3-5 years Med/Surg or ICU Nursing. Preferred: 1-2 years Utilization Review and quality data collection and reporting.

Required license/certification: Current Colorado RN license

Required skills (if applicable):

Job reports to (title of the position): Quality Director

Job titles reporting to you and number of incumbents for each job title:

ADA REQUIREMENTS (USE CODES IN LEGEND BELOW)

Complete this table by writing one of the codes listed in the legend below

Code	Description	Code	Description
N	Extreme Heat	C	Fume/Odor Hazards
N	Extreme Cold	A	Dust/Mites Hazards
N	Extreme Swings in Temperature	B	Chemical Hazards
A	Extreme Noise	A	Toxic Waste Hazards
N	Working Outdoors	N	Radiation Hazards
C	Working Indoors	A	Wet Hazards
A	Mechanical Hazards	N	Heights
A	Electrical Hazards	N	Other Conditions
N	Explosive Hazards	C	Physically Demanding*

*If you write A,B, or C in this box, you must also complete a Physical Demands Form.

LEGEND

Code	Percent use
N	Not applicable
A	01% - 33%
B	34% - 66%
C	67% or more

OSHA

- Tasks involving exposure to blood, body fluids, or tissues.
- Tasks not involving exposure to blood, body fluids or tissues, but employment may require performing unplanned Category 1 tasks.
- Tasks not involving exposure to blood, body fluids, or tissues and Category 1 tasks are not a condition of employment.

PATIENTS SERVED

- Neonate (0-28 days)
- Pediatric (29 days - 12 years)
- Adolescent (13-18 years)
- Adult (19-60 years)
- Geriatric (age 61 and older)
- No patient care



OUR COMMITMENT

- For each Commitment-Based Behavior and accompanying set of Behavioral Standards, the evaluator will consider how the employee demonstrates the Commitment-Based Behavior.
- You and employee will each indicate whether they believe the employee is a PEAK, Significant or Developing Contributor by marking the corresponding box.
- You should provide comments that will help the employee understand how you reached this assessment. Use concrete, specific feedback and examples to support your comments.

I commit to treating you with courtesy, dignity and respect.

I will keep people informed throughout by:

- Encouraging patients and families to be the drivers of their care.
- Explaining who, what, when, why, where and how.
- Respecting privacy.
- Controlling noise levels.
- Accommodating patient preferences whenever possible.
- Learning and providing culturally and age specific competent care.
- Addressing patient and family concerns effectively.

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

I commit to listening and communicating clearly.

- I will actively listen and be a good communicator by:
- Introducing myself and explaining my role.
- Making eye contact.
- Referring to patients and visitors by their last name. If I am not sure of pronunciation, I will ask.
- Listening with my head and heart before responding.
- Communicating professionally and respectfully without arguing or judging.
- Using plain language.
- Identifying and solving needs for language assistance.
- Using approved talking points when available and appropriate.
- Always asking, "Is there anything else I can do for you now?"

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.

RESPECT



INTEGRITY

I commit to earning your trust.

I will earn your trust by:

- Being honest.
- Keeping my word.
- Working to resolve any issues with you before going up the chain of command or involving others.
- Owning responsibility for my behavior.

I will project a professional image by:

- Following clothing and grooming standards.
- Wearing my badge above the waist, facing outward so it can be seen clearly.
- Communicating with confidence and concern.
- Taking my concerns to the appropriate place/person.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

I commit that, before acting, I will first ask, "Does this positively reflect EPMC's Mission, Vision, Values and Commitment?"

I will demonstrate this by:

- Keeping patient information confidential.
- Being aware of conversation and what can be heard by others.
- Not discussing my problems with patients or visitors or blaming others.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.



COMPASSION

I commit to caring about you as an individual and to respond to your concerns/needs as quickly as I can.

I will demonstrate this by:

- Individualizing care and response, being mindful of diversity.
- Treating the whole person: body, mind and spirit.
- Expressing a warm, sincere greeting to patients upon arrival and shift changes, and wishing them well upon departure.
- Thanking them for choosing our medical center.
- Being helpful and courteous on the phone, elevators and elsewhere.
- Smiling and having a friendly facial expression.
- Stopping and offering help, directions or escort.
- Meeting and managing expectations for call light service delivery.
- Being a problem solver and owning issues and requests until resolved in a mutually agreed-upon timeframe.
- Seeking help when I don't know the answer or cannot do a task.
- Supporting my co-workers thru difficult personal and professional challenges.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation
 Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

I commit to taking care of both you and me – body, mind and spirit.

I will demonstrate this by:

- Taking time to care for myself so that I am productive for work, family and personal responsibilities.
- Finding personal time to refresh my spirit and encourage others to the same.
- Maintaining work/life balance.
- Making time for service to my community.
- Respecting the spiritual values of others.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation
 Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.

I commit to being mindful of quality and making safe choices in my actions and decisions**I will follow safety guidelines by:**

- Washing my hands.
- Following procedures for proper patient identifications.
- Reporting unsafe practices and conditions.
- Making cleanliness a part of my job.
- Eating and drinking only in designated areas.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectationEvaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation***I commit to demonstrating and promoting teamwork.*****I will communicate with other team members openly and honestly by:**

- Agreeing or disagreeing openly, presenting alternatives and striving to make decisions work.
- Doing my part to share the workload fairly.
- Being flexible and helping others.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectationEvaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.

I commit to striving to do the right thing, for those I serve and for EPMC.**I will demonstrate this by:**

- Actively supporting the right thing.
- Calling a time out where patient safety seems jeopardized.
- Not tolerating inappropriate behavior and actions.
- Appropriately confronting the issues.
- Stepping outside of my job description to serve patients & others; making their day; going the extra mile.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectationEvaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation***I will take responsible risk for the benefit of those I serve, and I will be accountable and responsible for all my actions.*****I will demonstrate this by:**

- Taking personal risk for the benefit of others.
- Telling the truth even when others may not want to hear it.
- Being accountable/responsible for my own actions.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectationEvaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.



COLLABORATION

I commit to putting patient care, quality, and safety before my ego or territorial concerns.

I will demonstrate this by:

- Consulting with those who will be impacted by my decisions.
- Putting patient care, quality, and safety before ego or my "turf".
- Listening to the needs of patients/family members/community members, and then working with those who can help make the right things happen.
- Approaching others constructively with positive ideas and solutions and with an open mind.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

I commit to strive to be positive and constructive, and I listen and seek to understand the other viewpoint before I speak mine.

I will demonstrate this by:

- Approaching others constructively with positive ideas and solutions and with an open mind.
- Willingness to re-examine my perspective, plans, and decisions.
- Seeking out opportunities to work creatively with others to improve patient care.

Employee (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator (Select one): Consistently exhibits expectation Does not consistently exhibit expectation

Evaluator: Describe how you reached this assessment.



9	Performs chart reviews and works with physicians to optimize documentation that correlates to utilization review criteria and core measures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Designs, implements and facilitates a case management approach for selected patients/populations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Participate in committees as assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Perform in accordance with all local, state, and federal laws and regulatory agency standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Perform in accordance with EPMC vision, mission and goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	All other duties as assigned.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee (Select one): PEAK Contributor Significant Contributor Developing Contributor

Evaluator (Select one): PEAK Contributor Significant Contributor Developing Contributor

Employee: What did you achieve? What was the outcome?

Evaluator's Comments:



EMPLOYEE GOALS			
Strategic Objective	List Last Year's Goals	Date completed	Comments

Strategic Objectives:

1. Will be the employer of choice by attracting and retaining the best employees anywhere.
2. Continue to implement an organizational excellence model to ensure quality.
3. Ensure that facilities, technology and financial resources are available to support the future needs of the organization.
4. Offer a range of quality services that are important to the community, are appropriately provided in our setting and meeting the financial goals of the institution.
5. Ensure excellent clinical performance and customer-focused care service as verified by patient satisfaction measurements.
6. Strengthen EPMC's relationship with the community at large.

Setting S.M.A.R.T. Goals for Next Year

At least two goals are required. These work-related goals link to the strategic objectives of EPMC by directly supporting your department's goals.

Strategic	Specific	Measurable	Attainable	Realistic	Timeline
What strategic objective do your goals support?	List specifically what goals you will accomplish.	How will you and your supervisor know the goals are completed?	Can the goals be completed within the next year?	What support or resources do you need to accomplish the goals?	Dates the goals will be completed.



COMMENTS AND SIGNATURES

On this page, the evaluator and employee each sign and date as acknowledgement of their participation in the process. You and the employee may also use this page to write additional comments you wish to have noted.

Employee: Use this space to write any other comments about your goals or performance.

Employee's Signature _____ Date _____

Overall Performance Level (Select one):

- PEAK Contributor Significant Contributor Developing Contributor

Evaluator: Add your comments here.

Evaluator's Signature _____ Date _____



AFFIRMING OUR CODE OF CONDUCT AND COMMITMENT TO CONFIDENTIALITY

Please read the following information carefully and sign and date at the bottom of the page.

In the performance of functions for EPMC, you may have access to Confidential Information. Confidential Information is valuable and sensitive and is protected by law and by EPMC Policy. You are required to conduct yourself in strict conformance to applicable laws and EPMC policies governing Confidential Information. Access to Confidential Information is permitted only as authorized and as required for legitimate purposes in the performance of your job.

Confidential Information is patient information, participants of EPMC benefit plans and programs, customer information, physician credentialing, peer review, quality review, patient safety and risk management information, policies, personnel records, payroll records, logon and password information, employee health information and information related to operations and internal business affairs of EPMC that is not generally available to the public.

Protected Health Information (PHI) is information related to patients and their health care, condition, treatment or payment. It extends to information that is transmitted or maintained in any form or medium, whether electronic, paper or oral. All workers, whether directly involved in the care of the individual or providing support services, must use discretion when discussing PHI. PHI obtained should not be accessed or discussed unless absolutely necessary for work processes. Only PHI pertinent to the role of the worker in his/her employment function should be accessed and communicated per EPMC. If PHI is being discussed or otherwise inappropriately disclosed, the incident should be reported to a supervisor or the EPMC Compliance Officer.

I understand that I am responsible for being familiar with and adhering to EPMC’s policies, procedures and the Code of Conduct. I know how to access EPMC policies that are posted on the EPMC exchange drive. If I am unclear about a policy, procedure or regulatory requirement, I know it is my responsibility to seek clarification from my supervisor, Human Resources or through the Chain of Command process. I understand that the EPMC Compliance Hotline is also available to me to ask questions, communicate concerns or report suspected misconduct.

I understand I am accountable for my own actions while employed by EPMC. In addition, if I am supervising others, I understand that I am accountable for the activities within my area of responsibility and I will strive to create an atmosphere that encourages knowledge, open communication, high ethical standards and compliance.

I acknowledge that I am responsible for complying with all policies of Estes Park Medical Center. These can be found at Z:/Policies/HIPAA.

Employee’s Signature _____ Date _____

Return this completed performance evaluation tool to Human Resources.



Our Scorecard

Strategies / Measures	Prior EOY	Actual for this Period	YTD	Action Plan	Data Period	World Class	Meets Goal	Requires Monitoring	Below Goal
Strategic Objective X (People)									
Employee Turnover Rate	17.00%	0.00%	0.00%		Jan-11	0.00-.50%	.60-.80%	.80-1.10%	1.11%+
Completion Rate for Performance Evaluations	96.00%	100.00%	100.00%		Jan-11	100.00-97.01%	97.00-94.01%	94.00-91.01%	91.00% and below
Unplanned out of office (days)	42	2	2		Jan-11	0-3	4-6	7-10	11+
Strategic Objective Y (Quality/Service)									
Patient satisfaction overall top box	91.00%	96.00%	96.00%		Jan-11	100.00-94.01%	94.00-89.01%	89.00%-84.01%	84.00% and below
BMV Scan Rate	94.00%	82.00%	82.00%		Jan-11	100.00-98.01%	98.00-96.01%	96.00%-94.01%	94.00% and below
Critical Medication Errors	1	0	0		Jan-11	0	N/A	N/A	1+
Inpatient Unassisted Falls	4	0	0		Jan-11	N/A	0	N/A	1+
Pressure Ulcers	1	1	1		Jan-11	N/A	0	1	1+
National Patient Safety Goals									
Two identifiers	97.00%	94.00%	94.00%		Jan-11	100.00-97.01%	97.00-94.01%	94.00-91.01%	91.00% and below
Critical test result reporting	99.00%	99.23%	99.23%		Jan-11	100.00-99.01%	99.00-98.01%	98.00-97.00%	97.00% and below
Do-not-use abbreviations	79.00%	83.00%	83.00%		Jan-11	100.00-95.01%	95.00-90.01%	90.00-85.01%	85.00% and below
Hand-washing	86.00%	91.00%	91.00%		Jan-11	100.00-95.01%	95.00-85.01%	85.00-75.01%	75.00% and below
Strategic Objective Z (Finance)									
Actual units of service	3217	147	147		Jan-11	139 or less	140-149	150-159	160+
Actual FTEs	23	21	21		Jan-11	19 or less	20-23	24-26	27+
Actual cost per unit of service	\$87.23	\$92.27	\$92.27		Jan-11	\$85.00 or less	\$85.01-\$90.00	\$90.01-\$95.00	\$95.01+
Actual revenue per unit of service	\$6,123.00	\$7,455.00	\$7,455.00		Jan-11	\$7,000+	\$6500-\$6999	\$6000-\$6499	\$5999 or less
% Payroll Overtime Expenses	1.60%	0.90%	0.90%		Jan-11	1.00% or less	1.01-1.50%	1.51-2.00%	2.01% or more

Discussion Question

How does this position impact the above indicators?