Peer Evaluation Patient Clerical Assistant

Employee Name:

Last First MI

UK ID#

This form is a peer evaluation tool for enhancing feedback and performance success. Please complete this peer evaluation on the employee with whom you were assigned. This evaluation provides information to your supervisor about your peer’s performance and will highlight accomplishments and goals during the evaluation period.

Instructions: Please indicate your evaluation for each item by marking the appropriate box that best describes your peer. Return this form to your manager.

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| Provides Customer Service | High Performance | Medium Performance | Low Performance |
| Initiates, maintains, and completes medical records | Performs extensive maintenance of the charts. Can always count on them to have needed forms available or obtain unusual forms as needed. | Seeks opportunities to thin medical records. | Needs reminder to complete tasks and or uncompleted tasks. |
| Organizes and completes work per clerical policies | Completes tasks independently and without direction on a daily basis. Observed or documented positive feedback. Seeks opportunities to do extra tasks during downtime on a daily basis. | Completes assigned tasks on a daily basis. | Have to request admission/discharge data from clerk. |
| Effectively communicates with appropriate personnel | Screens phone calls, face-to-face interactions to assure staff, patient and families receive appropriate information and assistance.Interacts in a polite and professional manner on a consistent basis. | Provides directions and phone numbers to staff, patients, and families. Takes accurate messages and notifies the appropriate person. | Delay in getting messages to the staff, i.e. MD pages, etc. |
| Maintains a safe, neat and clean environment for patients, families, staff and visitors | Seeks opportunities to do extra tasks during down time on a daily basis. Takes appropriate action to address potential or anticipated security or safety issues. Ensures supplies are available. | Able to perform environment of care tasks with occasional direction. Screens visitors and responds appropriately to security alarms. | Frequently needs encouragement to complete environment of care tasks. |

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| Takes initiative in identifying and responding to patient/family and area needs. | Handles non clinical and environmental concerns or complaints immediately. Assures that concern is resolved and that resolution is reported to Charge RN or the Patient Care Manager. Calls appropriate personnel (PPD, EVS or Clinical Engineering) for environmental and non-clinical complaints. | Brings problems to Charge RN or the Patient Care Manager. Takes direction and follows through. | Rarely notifies Charge RN or the Patient Care Manager of issues. Complains about issues and/or gives the job to someone else. |
| Demonstrates Living DIReCT values Service Excellence | Actively participates in initiatives to enhance Service Excellence. Excellent communication skills with patients, families, co-workers, ancillary staff and MDs. Meets Living DIReCT values and attitude is supportive of unit morale. Team player. Consistent positive feedback from patients and families. Goes above and beyond. | Meets Living DIReCT values Attitude is always supportive of unit morale (i.e. follows dress code, no personal phone or computer use). | Does not meet Living DIReCT values On the computer frequently with non-work related programs or personal phone calls. Is not readily available to handle unit issues or concerns. |
| Reports to work on time and as scheduled | Works extra shifts throughout the year, or rearranges schedule to meet unit needs. Always on time. | Works shifts as scheduled. | Frequently late. Absent from the unit frequently for prolonged periods. |
| Professional Development |  |  |  |
| Serves as a resource for other staff and students | Consistently orients new clerical staff. Used as a resource by RN, MD, and ancillary staff. “Go to” person if need something. Participates in unit and hospital activities, workgroups, or committees. | Orients new clerical staff occasionally. | Minimal effort put forth when asked for help or information |

Comments/Suggestions:

The above peer evaluation has been reviewed with me:

Employee Signature:

Date:

Supervisor Signature:

Date:

 Form Reviewed/Revised 4-2015/Revised 3-2016/Revised 4-2017/Revised 4-2018/4-2019