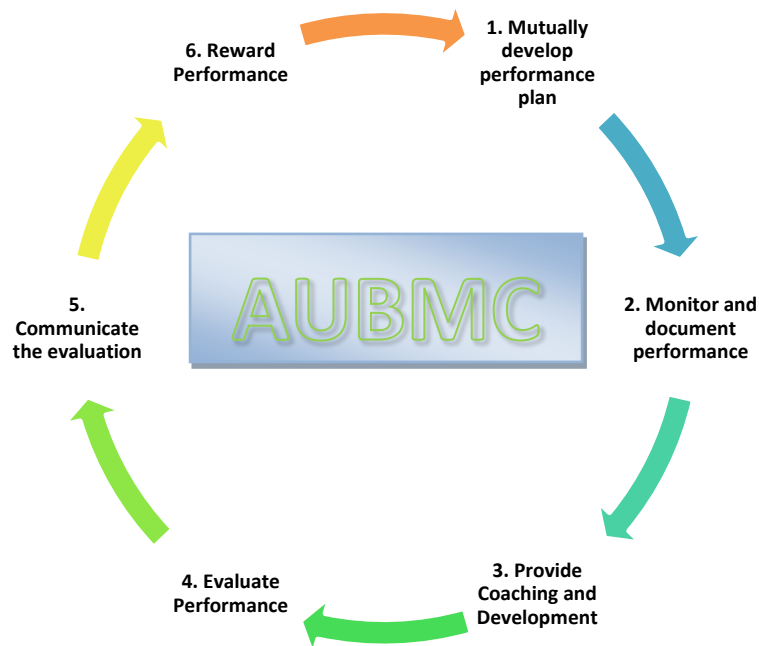


Performance Plan Manual



SECTION 1: PERFORMANCE MANAGEMENT PROGRAM

Performance Management is a joint program intended to advance AUBMC mission and vision by aligning individual employee contributions with the hospital's goals; Performance Management is a joint collaboration effort between a supervisor and an employee utilizing the concepts of coaching, supporting and developing.

Performance management is not a yearly task however it is based on an on-going process which leads to the appraisal:

- Planning work, setting expectations (standards and competencies) and goal setting
- Continually monitoring and documenting
- Coaching & developing employee in order to reach their full capacity
- Evaluating performance through the probationary, mid- year or yearly performance appraisal
- Communicate with the employee regarding his/her ratings
- Rewarding good performance

Strengths of Performance Management

- Reinforces the mission and vision of AUBMC while linking employee performance to the strategic focus of AUBMC.
- Core competencies are accentuated and discussed with employees.
- Ensures employees are familiar with the expectations of the organization and their supervisors, the goals they are expected to meet, and the criteria that will be used to evaluate their performance.
- Supervisors acknowledge good performance immediately, reinforcing desired behaviors and performance, and address problems as they arise.
- Supervisors observe and record specific examples (critical incidents) as they occur.
- Documentation is an ongoing process that provides a comprehensive, detailed, and accurate picture of the employee's performance over time.
- Involves continuous monitoring, coaching and feedback.
- Includes self-evaluation by employees who have an understanding of their place in the organization and their contributions to its success.
- The formal evaluation becomes a summary of ongoing performance discussions; it should hold no surprises.

Benefits of Performance Management

For employees, performance management provides an opportunity to:

- Give employees continuous feedback on their performance
- Make sure they understand the supervisor's expectations

- Learn how to improve deficiencies and get praise for their good work
- Seek to achieve results in meeting organizational goals and standards
- Identify strategies for working toward career goals
- Identify professional development opportunities

For supervisors, performance management provides an opportunity to:

- Establish a climate for success
- Build positive working relationships with employees
- Communicate expectations while reinforcing positive behavior
- Provide frequent coaching and feedback
- Document and assess employee strengths and weaknesses in order to plan and organize work accordingly
- Identify training needs
- Develop employee's skills and abilities
- Recognize outstanding performance and manage poor performance
- Address problem areas and develop solutions to improve efficiency of unit as well as team

For AUBMC, performance management provides an opportunity to:

- Reinforce organizational values and foster a positive organizational culture
- Inspires employee commitment and improves employee satisfaction, morale and retention
- Maximize contributions of employees
- Establish accountability for supervisors and employees
- Identify high-potential employees- succession planning and promotions
- Promote organizational change and development
- Identify concerns or problems

SECTION 2: PERFORMANCE PLANNING

Planning is a way of communicating performance expectations (standards and competencies) and goals to employees in order to direct their effort toward achieve organizational objectives. Getting employees involved in the planning process will help them understand the goals of the organization, what needs to be done, why it needs to be done, and how well it should be done.

- It describes the *results* that you should achieve as employee during the year.
- These *results* are expressed in terms of *Goals, Standards and Competencies*.

THE PERFORMANCE PLAN:

Configuring the first stage of Performance Management on *BDI Focus* system:

Step 1: Go to aub.bdifocus.com and log in using your AUB email and *focus* password

As a supervisor this is the screen that will appear for you:

Note that you have a tab called my staff.

The screenshot shows the BDI Focus system interface for a supervisor. The navigation bar at the top includes tabs for Performance, Development, and My Staff. The main content area displays 'My Focus - Welcome Hassan-Demo Alameh'. A large blue arrow points from the 'My Staff' tab to the 'My Focus' section. The interface includes several sections: 'Upcoming Tasks' with 4 assessment tasks overdue, 'How Am I Doing?' with a link to 'Compute how I'm doing', 'Upcoming Classes' with no upcoming classes, 'FYI' with development goals and updates, and 'My Direct Reports' with 1 employee without a performance plan. A legend at the bottom indicates critical (red circle), warning (yellow triangle), and normal (green circle) status.

Step 2: Click on my staff to see all employees directly reporting to you

My Direct Reports

Click on the employee name link to view and modify their data. To select an employee that is not in the list below, click the "Select Any Employee" link to the right.

Employee Name	Position/Title	Department	Strategic Unit	Group	Cost Center
No Image K. JOANNE	Clinic Assistant	Specialty Clinics	AUBMC	Non-Nursing	Specialty Clinics Internal Medicine

[Select Any Employee](#)

Copyright ©1998-2015, Business Decisions, Inc. All Rights Reserved. [Contact Administrator](#)

Step 3: Left click on any employee reporting to you to start creating their performance plan

Notice the drop down list that appears when you click on the employee name. Choose performance plan from this list.

My Direct Reports

Click on the employee name link to view and modify their data. To select an employee that is not in the list below, click the "Select Any Employee" link to the right.

Employee Name	Position/Title	Department	Strategic Unit	Group	Cost Center
No Image K. JOANNE	Clinic Assistant	Specialty Clinics	AUBMC	Non-Nursing	P.C. Internal Medicine

- 360° Assessments
- Resume
- Performance Plan**
- Development Plan
- View Employee Information
- View Employee's Class Transcript
- More ...

Copyright ©1998-2015, Business Decisions, Inc. All Rights Reserved. [Contact Administrator](#)

Step 4: Configuring the Performance Plan:

After you click on Performance Plan for the employee reporting to you this is the screen that you will see:

Note that goals, standards and competencies are initially empty

Performance Plan of JOANNE K

This performance plan was last updated on **Monday, January 13, 2014 10:27**

Current Job: [Clinic Assistant](#)
Department: Private Clinics
Strategic Unit: AUBMC
Group: Non-Nursing
Cost Center: P.C. Internal Medicine

[Full View](#) [Summary View](#)

Individual Goals [Add](#)

No active goals were found.
To add Individual Goals to this performance plan select the **Add Individual Goals** link.

[Add Individual Goal](#)

Standards [Add](#)

No active standards were found.
To add Standards to this performance plan select the **Add Standards** link.

[Add Standards](#)

Related Links

- [Create/Maintain Performance Reviews](#)
- [Add Individual Goal](#)
- [Add Standards](#)
- [Add Competencies](#)
- [Remove All Items](#)
- [Archive Performance Plan](#)
- [Edit Preferences and Notifications](#)

Reports

- [This Performance Plan](#)
- [Past Performance Reviews](#)
- [Performance Review Scorecard](#)
- [Supervisor Goals Linkage Report](#)
- [Performance Plan Archives](#)
- [Company Goals](#)
- [Department Goals](#)

Next you will click on **Add Individual Goal**

Step 4.1: Setting and Monitoring Goals:

- Supervisor and employee work together to establish annual performance goals
- Review goals throughout the year for relevance, adjust as necessary
- Be **SMART** when setting goals:
 - **S**pecific goals outline exactly what the organization hopes to accomplish
 - **M**easurable goals can be evaluated to determine whether they have been accomplished
 - **A**ction-Oriented goals specify the actions you will take
 - **R**ealistic goals are attainable but challenging
 - **T**ime-Oriented goals have a specific amount of time in which to be accomplished
- Setting individual goals:
 - After you click on Add Individual Goal the following screen will come up:

Add Individual Goal

Step 1: Select Goal Linkage

✓ Please link your individual goal to one of the goals below.

Select One:

- Company Goals**
 - ☐ **Financial Performance** (Category: Financial Performance)
 - ☐ **Operational Efficiency** (Category: Operational Efficiency)
 - ☐ **Ensure patient safety** (Category: Patient-Centered Care)
Ensure patient safety by following predefined policies and procedures pertaining to patient centered care
 - ☐ **Implementation of Patient Centered Care Initiatives** (Category: Patient-Centered Care)
Implementation of initiatives taken during council meetings that enhance patient centered care
 - ☐ **Improve patient centered care** (Category: Patient-Centered Care)
Improve patient centered care by using evidence based practice in an efficient and timely manner
 - ☐ **Increase accessibility for patients** (Category: Patient-Centered Care)
Increase the provision of medical aid to a wider scope of patients
 - ☐ **Adherence to National Patient Safety goals** (Category: Quality and Safety)
Ensure adherence to National Patient Safety goals
 - ☐ **Freedom of accidental injury due to medical care or medical errors** (Category: Quality and Safety)
The degree to which health services for individuals and populations increase the likelihood of desired health outcomes and are consistent with current professional knowledge
 - ☐ **Implement quality control measures** (Category: Quality and Safety)
Ensure that quality control measures are implemented in a timely manner
 - ☐ **Reduction of Preventable Adverse Events** (Category: Quality and Safety)
Reduce Medication Error by following the below criteria:
Improving safety of our care systems
Improving human performance
Improve "culture of quality and safety"
 - ☐ **Engagement Initiatives** (Category: Service Excellence)
Promote initiatives that will create a more engaged workforce
 - ☐ **Improve Physician Satisfaction** (Category: Service Excellence)
By fostering strong relations with and between employed and voluntary physicians on our staff as well as physicians in the community who are not on our staff, we will achieve

Reports
Summary of all Comp Goals
less...

- Select *Company Goal* then click on *Next Step*
- Next we will add Individual Goal that is LINKED to the Company Goal:

Add Individual Goal

Step 2: Add Minimal Goal Details

Linked to Operational Efficiency

✓ Enter the required data below.

Goal Name:

Description:

Planned Start Date: (dd/mm/yyyy)

Planned Completion Date: (dd/mm/yyyy)

Success Measures: Enter success measures in the field provided below. Use this to enter in a definition of success for this goal (e.g. 20% quicker cycle improved customer satisfaction, etc.) and who should provide feedback on your success (e.g. your supervisor, specific customers, etc.)

1. You have to input goal name

2. You have to input description of goal

3. You have to input a planned start date and planned completion date

4. Finally you will put success measures

- ✓ Remember that individual goals should always tie to the Mission and Vision of AUBMC and the department.
- ✓ The individual goals should fall under the umbrella of the organization to make sure that your efforts are aligned with the organization's policies. The Company or Department goals are generated on the system, the individual goal you choose will have to be linked to one of them.
- ✓ Samples of individual goals that are linked to organization goals:
 - We will increase transfer admissions by 12% over last year
 - We will conduct department meetings once per month with a published agenda so that employees can come prepared to offer input on meeting topics
 - We will complete customer service training by April 15
- Next you click on *Add More Detail* to put an appraisal weight on this goal

home starttrak my profile password logout Report Issues help

Hello Hassan-Demo Alameh Search

My Staff

Spell Check Enlarge Text Area

Planned Start Date: (dd/mm/yyyy)

Planned Completion Date: (dd/mm/yyyy)

Success Measures: Enter success measures in the field provided below. Use this to enter in a definition of success for this goal (e.g. 20% quicker cycle time, improved customer satisfaction, etc.) and who should provide feedback on your success (e.g. your supervisor, specific customers, peers, etc.)

Spell Check Enlarge Text Area

Select the type of units:
No Breakout

Add another new individual goal: Add Another Goal

Save and add more details to this goal: Add More Details

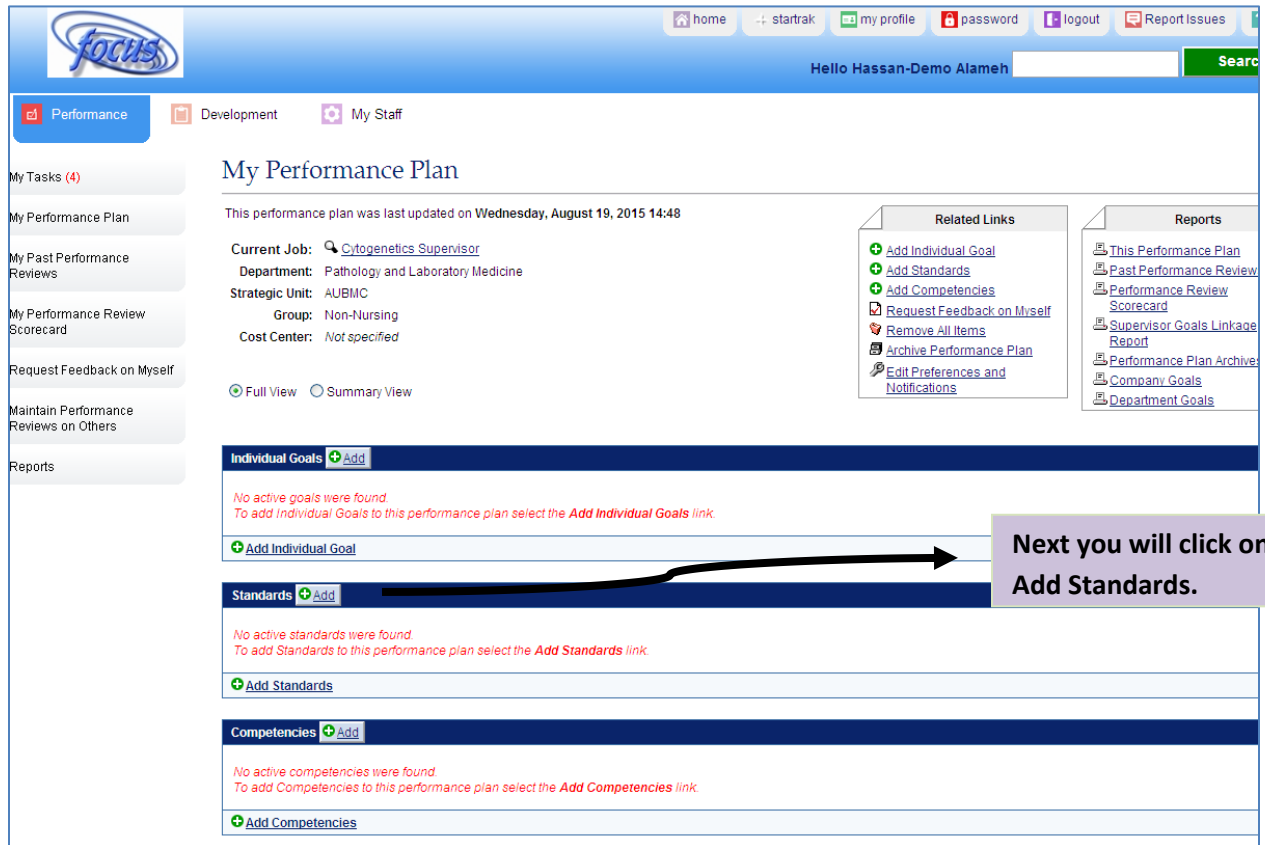
Finish adding goals and return to the performance plan: Finish

- After you click on Add More Detail please *Add Appraisal Weight* for the goal and change the *Status* if it has started

The screenshot shows the 'Edit Individual Goal' interface. The 'Goal Basics' section includes the following fields and controls:

- Goal Name:** A text input field.
- Linked to Company Goal:** A dropdown menu showing 'Operational Efficiency' with a 'Relink' button.
- Description:** A large text area with 'Spell Check' and 'Enlarge Text Area' buttons.
- Appraisal Weight:** A numeric input field set to '0' with a '%' sign.
- Planned Start Date:** A date picker set to '30/09/2015'.
- Planned Completion Date:** A date picker set to '31/07/2016'.
- Status:** A dropdown menu set to 'Not Started'.
- Revised Completion Date:** A date picker set to '31/07/2016'.

- When you save it, it will automatically take you back to the performance plan page
- Next you either *add more goals* or you can start *adding standards*. It is preferable to have at least two goals.
- Step 4.2: Adding Standards:
 - A performance standard describes, in measurable terms, the results that indicate that an employee in the position has properly performed the particular essential function. Standards tell us exactly how to tell that the essential function is done properly and it may include, but is not limited to, quality, quantity, timeliness, and documentation.



My Performance Plan

This performance plan was last updated on Wednesday, August 19, 2015 14:48

Current Job: [Cytogenetics Supervisor](#)
Department: Pathology and Laboratory Medicine
Strategic Unit: AUBMC
Group: Non-Nursing
Cost Center: Not specified

☒ Full View ☐ Summary View

Individual Goals [Add](#)

No active goals were found.
To add Individual Goals to this performance plan select the **Add Individual Goals** link.

[Add Individual Goal](#)

Standards [Add](#)

No active standards were found.
To add Standards to this performance plan select the **Add Standards** link.

[Add Standards](#)

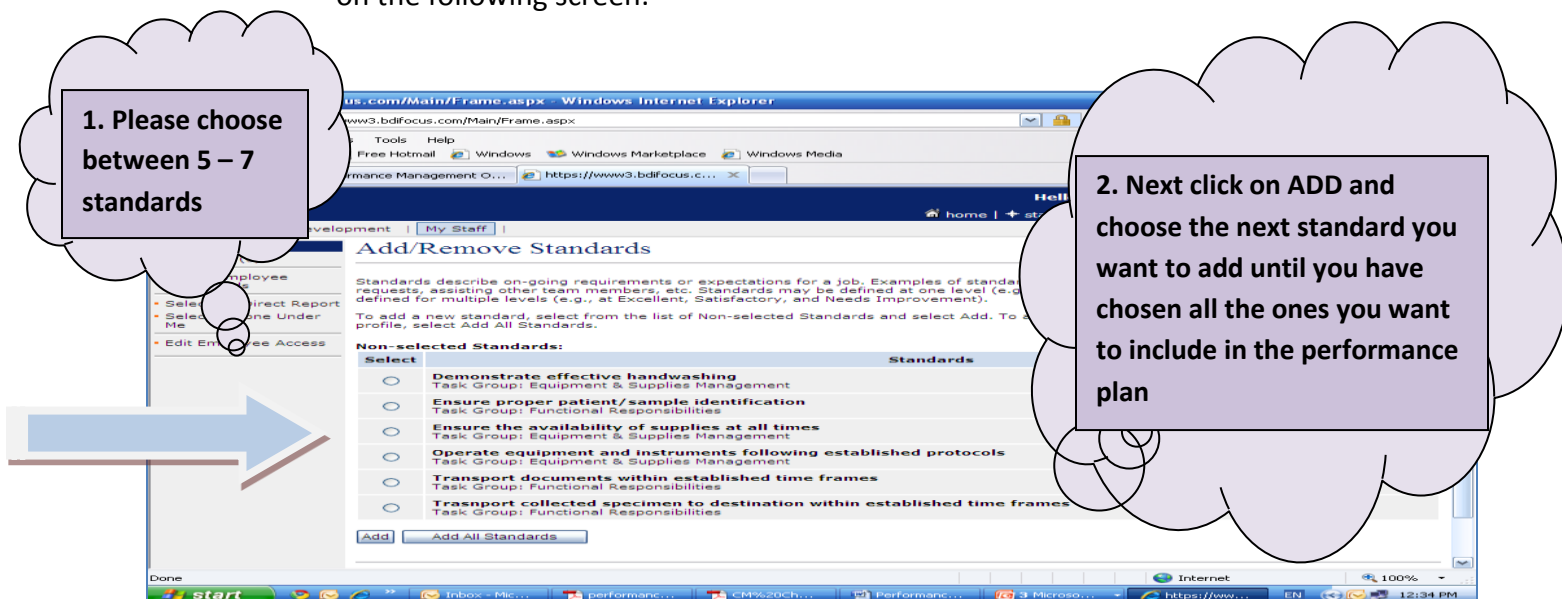
Competencies [Add](#)

No active competencies were found.
To add Competencies to this performance plan select the **Add Competencies** link.

[Add Competencies](#)

Next you will click on Add Standards.

- After you click on Add Standards, the standards associated with the job will show on the following screen:



1. Please choose between 5 – 7 standards

2. Next click on ADD and choose the next standard you want to add until you have chosen all the ones you want to include in the performance plan

Add/Remove Standards

Standards describe on-going requirements or expectations for a job. Examples of standard requests, assisting other team members, etc. Standards may be defined at one level (e.g. defined for multiple levels (e.g., at Excellent, Satisfactory, and Needs Improvement)).

To add a new standard, select from the list of Non-selected Standards and select Add. To profile, select Add All Standards.

Select	Standards
<input type="radio"/>	Demonstrate effective handwashing Task Group: Equipment & Supplies Management
<input type="radio"/>	Ensure proper patient/sample identification Task Group: Equipment & Supplies Management
<input type="radio"/>	Ensure the availability of supplies at all times Task Group: Equipment & Supplies Management
<input type="radio"/>	Operate equipment and instruments following established protocols Task Group: Functional Responsibilities
<input type="radio"/>	Transport documents within established time frames Task Group: Functional Responsibilities
<input type="radio"/>	Transport collected specimen to destination within established time frames Task Group: Functional Responsibilities

[Add](#) [Add All Standards](#)

- After you have finished choosing the standards click on *FINISH*

Feedback on Myself

Performance Others

Task Group: Specimen Processing

○ Provide input for annual assessment in appropriate time frames
Task Group: Administrative Issues

○ Refuse to accept inadequate and/or poorly identified samples and request new samples when necessary
Task Group: Data Entry & Specimen Receipt

○ Update or write SOPs in an effective way following department document control system
Task Group: Administrative Issues

Add Add All Standards

Task Group	Standard	Remove
Administrative Issues	Active in at least three special projects per year within the department	<input type="checkbox"/>
Specimen Processing	Communicate information regarding lab analyses to clients in a timely and efficient manner	<input type="checkbox"/>
Specimen Processing	Ensure all errors reported are corrected	<input type="checkbox"/>
Data Entry & Specimen Receipt	Ensure proper patient/sample identification	<input type="checkbox"/>
Data Entry & Specimen Receipt	Verify specimen suitability including adequate amount/volume and quality of the product	<input type="checkbox"/>

Balance performance plan weights and return to performance plan: [Finish](#)

- This will take you to the screen where you have to put *an appraisal weight* for each standard

Edit Performance Plan Appraisal

Enter the appraisal weights for the performance plan items listed below. The group name or competency name.

1. Please insert a weight for each chosen standard

Individual Goal	Linked to Goal	Appraisal Weight
No active goals were found.		

Task Group	Standard	Appraisal Weight
Administrative Issues	Active in at least three special projects per year within the department	0 %
Specimen Processing	Communicate information regarding lab analyses to clients in a timely and efficient manner	0 %
Specimen Processing	Ensure all errors reported are corrected	0 %
Data Entry & Specimen Receipt	Ensure proper patient/sample identification	0 %
Data Entry & Specimen Receipt	Verify specimen suitability including adequate amount/volume and quality of the product	0 %
Standards Total:		0 %

- **Step 4.3: Adding Competencies:**

- Competencies are skills that are essential to the performance of a position. The competencies you choose will be assessed and used for developmental purposes.

My Performance Plan

This performance plan was last updated on Wednesday, August 19, 2015 14:48

Current Job: [Cytogenetics Supervisor](#)
Department: Pathology and Laboratory Medicine
Strategic Unit: AUBMC
Group: Non-Nursing
Cost Center: Not specified

☒ Full View ☐ Summary View

Individual Goals [Add](#)

No active goals were found.
To add Individual Goals to this performance plan select the [Add Individual Goals](#) link.

[Add Individual Goal](#)

Standards [Add](#)

No active standards were found.
To add Standards to this performance plan select the [Add Standards](#) link.

[Add Standards](#)

Competencies [Add](#)

No active competencies were found.
To add Competencies to this performance plan select the [Add Competencies](#) link.

[Add Competencies](#)

Next click on Add Competencies

1. First click on Add Job Competencies

click on Add Competencies the following screen will appear:

Add/Remove Competencies

These competencies that will be assessed. Performance Plans usually include goals and/or performance standards in addition to assessed competencies. If you want to identify important competencies for development purposes and not as a part of the performance appraisal, identify these in the development needs competencies section associated with each goal.

One or more job competencies are missing from this performance plan. To add all competencies associated with this employee's position, select **Add Job Competencies**.

To search for a specific competency, enter the search criteria and press the **Search** button.

Find the competencies by keyword:
 e.g. Enter keywords separated by a space or blank for all competencies.


Keyword(s): ☒ Name ☒ Description

Find the competencies by keyword:
e.g. Enter keywords separated by a space or blank for all competencies.

Keyword(s): ☒ Name ☒ Description

Competency	<input type="button" value="Remove"/>
<input type="checkbox"/> Achievement Orientation - 3 -	<input type="checkbox"/>
<input type="checkbox"/> Applied Technology - 3 -	<input type="checkbox"/>
<input type="checkbox"/> Client Focus - 2 -	<input type="checkbox"/>
<input type="checkbox"/> Communication Skills - 3 -	<input type="checkbox"/>
<input type="checkbox"/> Computer Skills - 3 -	<input type="checkbox"/>
<input type="checkbox"/> Developing Others - 3 -	<input type="checkbox"/>
<input type="checkbox"/> English Comprehension - 3 -	<input type="checkbox"/>
<input type="checkbox"/> Human Resources Management - 2 -	<input type="checkbox"/>
<input type="checkbox"/> Information & Records Administration - 4 -	<input type="checkbox"/>
<input type="checkbox"/> Initiative - 2 -	<input type="checkbox"/>
<input type="checkbox"/> Organizational Awareness - 2 -	<input type="checkbox"/>


2. Select the competencies that you do NOT want to include and click on *Remove*



- After you have finished removing the competencies that you do not want to include click on FINISH. This will take you to the Appraisal Page to place your weights for each competency selected.

Competency	
<input type="checkbox"/> Applied Technology - 3 -	<input type="text" value="0"/> %
<input type="checkbox"/> Computer Skills - 3 -	<input type="text" value="0"/> %
<input type="checkbox"/> English Comprehension - 3 -	<input type="text" value="0"/> %
<input type="checkbox"/> Information & Records Administration - 4 -	<input type="text" value="0"/> %
<input type="checkbox"/> Resource Management - 2 -	<input type="text" value="0"/> %
<input type="checkbox"/> Technical Expertise - 4 -	<input type="text" value="0"/> %
Competencies Total: <input type="text" value="0"/> %	
Total Weight (should equal 100%): <input type="text" value="0"/> %	

1. First insert weights. Remember the total appraisal weight is 100%



This is the last step in configuring the Performance Plan. Next you will need to do this for every employee reporting to you.

SECTION 3: EMPLOYEE MEETING

Once the Performance Plan is completed, you will have **one task pending: Performance Planning**.

No Image Employee Meeting [Hide Steps]	Performance Review	For: K, JOANNE Title: Clinic Assistant	Wed, Sep 23, 2015
--	--------------------	---	-------------------

1 - Employee Meeting
 Alameh, Hassan-Demo
 (Supervisor)
 Due On: 9/23/2015

You will have to meet with your employee informing him/her of the performance plan for the coming fiscal year; the employee has the right to know of his/her objectives. Once the employee meeting takes place, click on employee meeting and finalize the task.

Throughout the year, anecdotes could be added by the employee or supervisor by clicking on the **Add Notes** tab:

[home](#)
[startrak](#)
[my profile](#)
[password](#)
[logout](#)
[Report Issues](#)
[help](#)

Hello Hassan-Demo Alameh [Search](#)

[My Staff](#)

Individual Goals [Add](#)

Individual Goal #1
Project a Professional Image

[Edit Individual Goal](#)
[Assign Individual Goal](#)
[Delete Individual Goal](#)

Linked to Goal: [Financial Performance - Company Goal](#)

Assigned By: Hassan-Demo Alameh
Status: [Not Started](#)
Appraisal Weight: [20%](#)

Created on: Tue, Jun 10, 2014
Planned Start Date: Mon, Jun 2, 2014
Planned Completion Date: Fri, Jun 13, 2014

Description:
Project a Professional Image at AUBMC

Success Measures:
Zero error
Patient Confidentiality

Action Steps: (0) [Add Action Step](#)

Notes: (0) [Add Note](#)

For further assistance, please do not hesitate to contact us:

Joanne Kadado

Email: jk50@aub.edu.lb

Ext.: 6139