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Terminology

Assessment – the Performance Reflection form; this year it is created and stored electronically within HealthStream for all eligible roles up to and including Director. There is one (1) form for all roles.

Assessment State – the current status of the performance reflection form; 2025 statuses, in the process order, are Evaluate/Rate → Review/Meeting → Employee Sign-off then Rater Sign-off → Closed.

Eligibility – all full or part-time, regular or relief (PRN) employees, regardless of hours worked who were hired/active before October 1st of the performance cycle.

Peer Reflection – ***required for all RN Leaders***, *per Pathways, and strongly recommended for other RNs and/or any leaders*; an exact copy of the official performance reflection form used to get feedback from someone who works closely with the individual (*ex. – previous supervisor, secondary job supervisor, provider, direct report, provider, interdisciplinary peer, department team member, etc.*); the Manager/Rater assigns peer forms from within the team member's reflection form using the steps below:

1. Locate the individual's performance form in their Raters tab > All Assessments subtab.
2. Click the drop-down arrow to the right of the "Rate" button.
3. Choose 'Manage Raters and Peers'
4. In the upper right corner, click the 'Select Peers' link.
5. At the far left, type the peer's last name, click the **CHECK BOX** for 'Search All Institutions", click the small gray "Apply" button.
6. Click the check box in front of the desired peer's name.
7. Click "Add Selected"
8. Confirm peer's name appears in the upper right box.
9. Scroll down and click the check box in front of each person you want the selected peer to review.
10. Click "Apply Selections" to immediately send the Peer Reflection form(s) to the peer's HealthStream "To Do" list.

IMPORTANT: *Once submitted by the peer, no changes can be made to their form.*

Performance Cycle – for performance reflections, a 12-month period; currently a calendar year.

Rater/Manager – person in the team member's Supervisor field in UKGPro/UltiPro; automatically assigned the Review/Reflection Rater role in HealthStream if they were the team member's manager at form launch. When an individual transfers to another supervisor, the Performance Reflection form is automatically moved to the new supervisor's Raters tab. They will also be assigned ownership of the entire process though signoffs unless the former supervisor has saved entries within the form, in which case the former supervisor remains the Rater and owns the process through Signoffs.

Rating/Success Level – as of 2022, we adopted a 4-level Success or Rating scale; below is a list of each level's title and description:

- **ROLE MODEL** (Unequaled Performance): **"Sets the example for others."**
  ~ *Inspires practices and behaviors that drive organizational excellence. Consistently performs at the highest level of their job and sets the standard for others. Motivates peers through exceptional results, positive influence, and consistently demonstrating the organization's values and best practices.*
  Basic Examples: Instrumental in establishing aligned goals, monitoring progress, and driving results. Regularly participates in recognition and peer feedback sessions for mutual growth and development. Sees opportunities for improvement and leads the way in engaging others in the problem solving and implementation processes for diverse approaches and opinions. Demonstrates an innovative mindset and behaviors. Holds others accountable for inappropriate behaviors with a focus on their growth and development.
- **OUTSTANDING CONTRIBUTOR** (Exceptional Performance): **"Better than expected."**
  ~ *Goes beyond expectations. Regularly exceeds job requirements, shows initiative, and positively impacts the team, department, & customers with high-quality service, work & proactive behaviors.*
  Basic Examples: Demonstrates outstanding levels of effort, effectiveness, and judgement with limited or no supervision. Anticipates patient/customer/team member needs to deliver an elevated level of service. Frequently exceeds objectives and demonstrates a mindset of continuous improvement. Demonstrates outstanding self and social emotional intelligence.
- **EFFECTIVE CONTRIBUTOR** (**SUCCESSFUL; Skilled Performance**): **"Solid and dependable."**
  ~ *Consistently meets expectations. Gets the job done as required, demonstrates solid behaviors, and can be counted on to deliver dependable results.*
  Basic Examples: Reliable, meets deadlines, prioritizes tasks, and achieves outcomes. At times, exceeds job expectations or takes on additional projects. Exhibits self-awareness and takes action to resolve interpersonal or customer service issues with compassion and humility.
- **INCONSISTENT CONTRIBUTOR** (Inadequate Performance): **"Sometimes, but not often enough."**
  ~ *Sometimes meets expectations, but job performance or behavior is uneven or unreliable. May need reminders, extra support, or improvement to be successful.*
  Basic Examples: Often misses deadlines and rarely takes responsibility for actions, outcomes, or behaviors. Job performance and/or behaviors cause occasional issues for customers, team members, or the department.

RESET – process that **wipes all entries** in the Rater/Manager, Self, and Peer forms; requires peers to be re-selected, if applicable.

REVERT – process to return a performance reflection form to the initial Evaluate/Rate step; allows Rater to make modifications to the form and/or receive missing Self and/or Peer forms.

Self-Reflection – an exact copy of the official performance reflection form assigned to the individual's HealthStream "To Do" list; once submitted becomes fixed in the official form; in 2025, the form is **required of all RN Leaders** who receive the assignment and is strongly recommended for all other RNs as well as others in leadership roles; completed by the individual based on their personal viewpoint and supported by examples of their achievements and challenges during the performance cycle. ***IMPORTANT:*** *Once submitted, no changes can be made to their form.*

Sign-Off – the performance reflection step where both the team member and supervisor confirm they held an in-person or virtual performance review discussion. This does not indicate the team member agrees or disagrees with the reflection form's content. An optional final comments box is available at this step. To initiate this step, the manager/rater clicks "Begin Sign-Off" within the direct report's performance reflection form. There are two (2) options available for sign-off:

- **Together (*default*)** – used when reviewing the form on the leader's screen; **requires** the manager and direct report to know their HealthStream credentials as Single Sign-On isn't available. Once both parties have entered their credentials and desired final comments, click either "Sign-Off and Print" (*to get a printed copy*) or "Sign-Off".
- **Remote with Employee Sign-Off** – used when reviewing a paper version of the reflection form, reviewing the form in a virtual meeting, or when the direct report would like time to review the form independently before sign-off; Rater/Manager clicks "Remote with Employee Sign-Off" then "Continue Sign Off". Once the team member signs off, the Rater must complete their Sign-Off task which will be located in the Raters tab > All Assessments subtab.

Statement – a performance item, often requiring selection of a rating/success level; for 2025, there are only three (3) items, each requiring a rating AND comment:

- **What You Do –** Job Role (2025 duties, tasks, deliverables)
- **How You Do It** – Interactions (2025 behaviors, mindset, approach)
- **Where To Grow** – Development (2026; one focus area for growth; use "Future Growth" rating)

Performance Review Process

Q: Who is eligible to receive a 2025 Performance Review?

A: All full- or part-time, regular or relief (PRN) team members, hired before 10/01/2025, are eligible to receive a 2025 Performance form. For those hired on or after 10/01/2025, the supervisor should schedule a 30-Day and 90-Day conversation, regarding their onboarding experiences at each of these milestones. A 90-Day Conversation Form is available on the Investing In Us website > Engaging Us page.

Q: When are 2025 Performance Reviews launched or made available?

A: Reviews are conducted electronically within HealthStream. Since the 2025 Performance Review covers the calendar year of January 01, 2025 to December 31, 2025, the review form will be launched within HealthStream on 01/06/2026.

Q: On what job role will I be evaluated for 2025?

A: Your 2025 performance reflection will be based on the job role you were in as of 09/30/2025, regardless of how long you've served in that role. If you transferred to a new job role, department or supervisor during the performance cycle, the new Rater/Manager (*see Terminology for additional information*) should request performance feedback from your previous supervisor through a Peer Reflection form.

Q: Who is responsible for completing the 2025 evaluation form?

A: Your 2025 performance reflection will be completed by your direct supervisor at the time the form was launched (created). If you changed supervisors prior to 10/01/2025, your current supervisor will request performance feedback related to your former job role from your previous supervisor. For transfers on or after 10/01/2025, your current supervisor will complete your form based on your current role and performance in the final quarter of 2025. It is recommended that your current supervisor request a Peer Reflection form from your former supervisor in order to gain a reflection for the entire 2025 period.

Q: When are 2025 Performance Reflections due?

A: The 2025 Performance Reflections are to be fully completed (signed off) on or before March 31, 2026. This provides time to capture a self-reflection, feedback from additional contributors, if desired, as well as data related to outcomes achievement, where applicable.

Q: What do I do if a direct report is or expects to be on leave when the reflections are due (03/31/26)?

A: When feasible, plan to complete all aspects of the review prior to their leave date. If that is not possible, all portions of the review process can be completed with the exception of the Reflection

Review Meeting and Sign-offs, as the team member is not to perform work-related duties while on leave. These tasks, as well as the full completion of the reflection form, are required to be done within thirty (30) days of the team member's return to work (RTW) date.

Q: What if I have a PRN direct report who isn't scheduled to work between the launch date (01/06/26) and the due date (03/31/26)?

A: At launch, reach out to them to schedule paid time for them to complete their Self-Reflection, is expected. Prioritize completion of their ratings and comments in their 2025 Performance form. When both are done, click "Submit to Review" and schedule paid time to meet and review the form, either in person or virtually, and complete signoffs.

STEPS: Before concluding the meeting, click "Begin Sign-Off" > choose "Remotely" > click "Complete Sign-Off". Have them complete their HealthStream To Do list sign-off task. Finally, complete your "Sign-Off" task from your Raters tab.

Q: How can I capture performance notes throughout the year, so the 'year-end' process isn't so challenging to produce?

A: HealthStream offers a notes entry and document upload function. Either can be related to your personal performance or another person's performance. These both remain private to you until they are imported into a formal document, such as a Performance Reflection form. At that time, they become discoverable.

1. Within your HealthStream account, click the Profile tab.
2. Select either Notes or Documents then follow the onscreen prompts.

Q: How do I know where my direct report's review is in the process?

A: Managers can navigate, in HealthStream, to their Raters tab > All Assessments subtab. This page lists all open reviews and their current "Status". **NOTE:** To view closed forms, change all three filters at the top of the page to "All".

Q: I'm the 'Rater' but my direct report transferred to another leader and they've been removed from the My Team Dashboard. How do I access their review to complete this task?

A: If you began composing their form before their transfer, from your Raters tab,

1. Click the 'All Assessments' subtab.
2. Locate the 2025 Performance Reflection form line item for the individual.
3. Click the 'Rate' button located to the far right of the line item.

If you did not begin composing their form, request a Peer Reflection form from their new leader.

Q: My direct report transferred from another leader during the review period. Who completes their review?

A: The supervisor of record at the time of the form's launch serves as the 'Rater' for the annual review and is accountable for completing the review and holding the review meeting with the team member. If the form was not started by the previous supervisor prior to the transfer, as the new leader you will send a "Peer Reflection" to the original supervisor for their ratings and feedback. Reference / mimic these in your entries with the exception of the "Where To Grow" (Development) section where you should draft their growth plan for 2026. Peer Reflections can also be sent to others who are close to the team member's direct work.

Q: How do I send a copy of the review to the team member for our review meeting?

A: From your Raters tab > All Assessments subtab, click the drop-down arrow to the right of the rate button then select Print to open a print dialog box. This can be saved as a PDF and emailed or can be printed and given to them at or before the meeting.

Q: What do I do if my team member refuses to complete their Sign-Off step?

A: Remind the team member that their sign-off simply indicates they've received the in-person/ virtual Review Meeting, **not** that they agree or disagree with the contents. If they still refuse to complete this step, contact Human Resources (x4700 or HumanResources@AugustaHealth.com) immediately following the refusal so an HR representative can contact the team member.

Q: What is the final step in the review process that marks it as complete?

A: Rater Sign-Off; once submitted, HealthStream marks the review as 'completed'. To view completed forms back to 2022, go to the Raters tab > All Assessments subtab and change the 3 filters at the top of the page to "All". To sort the forms by direct report last name, click the "Employee" header. **NOTE:** To view and/or print historical reviews between 2016 and 2021, go to UKGPro (*Profile → Jobs tab → Reviews subtab → History table → click the date hyperlink*).

Q: I'm working from home. How do I access my review or my direct report's review when not on-site?

A: From your computer's internet browser, search for "Augusta Health for Employees" then click the 'HealthStream' link & log in. Go to your Raters tab > All Assessments subtab.

Q: My personal review is complete. How do I print a copy for my records?

A: Within HealthStream, go to your Completions tab, locate and open/print your performance form.

Q: My direct report's review is complete. How do I print a copy?

A: Within HealthStream, go to your Raters tab > All Assessments subtab, change all filters to "All", locate and open/print their performance form.

Q: I have a new direct report. How do I view their historical reviews?

A: To view completed forms back to 2022, go to the Raters tab > All Assessments subtab and change the 3 filters at the top of the page to "All". To sort the forms by direct report last name, click the "Employee" header. **NOTE:** To view and/or print historical reviews between 2016 and 2021, go to UKGPro (*Profile → Jobs tab → Reviews subtab → History table → click the date hyperlink*).

Review Template

Q: How many items need to be rated in the 2025 review template?

A: There are three (3) items **requiring a rating AND comment** in the 2025 performance reflection:

1. **What You Do –** Job Role (2025 duties, tasks, deliverables)
2. **How You Do It** – Interactions (2025 behaviors, mindset, approach)
3. **Where To Grow** – Development (2026; one focus area for growth; use "Future Growth" rating)

Q: Do the rated items require comments?

A: Yes, comments are required to be included for each of the three (3) items.

Q: What are the Rating or Success Levels for 2025?

A: For the 2025 items (What You Do & How You Do It), there are 4 rating or success levels with only 1 being below the standard expectation for the item:

1. **Role Model** = Unequaled demonstration of the performance item
   "Sets the example for others."
2. **Outstanding Contributor** = Exceptional demonstration of the performance item
   "Better than expected."
3. **Effective Contributor** = **Successful & consistent demonstration of the performance item**
   "Solid and dependable."
4. **Inconsistent Contributor** = Inadequate demonstration of the performance item
   "Sometimes but not often enough."

Best Practices & Talking Points

- **Surprise-Free!**
  The annual performance reflection should not be the first conversation with the team member about their performance! It should never come as a shock or surprise, regardless of the level of performance. It's essential to have ongoing conversations (*quarterly at a minimum*) with each team member and a good practice therefore required that the direct report to provide a Self-Reflection as part of the yearly review. This helps bring light to accomplishments you may have missed witnessing, provides insights to their perception of their success and challenges, and allows the team member to share areas of interest related to their professional growth.
- **Alignment & Connection**
  When team members are more engaged (*aligned to organizational initiatives and see a direct connection to meaningful work*) they achieve better outcomes, improve processes, generate greater patient/customer satisfaction, take accountability for successes as well as failures, and experience greater resilience. **TIP:** Regularly recognize the team member's impact and value during your 1:1 conversations to reinforce desired behaviors.
- **Shared Understanding of What Success Looks Like**
  Oftentimes, the leader's assessment of what's needed to demonstrate "success" in a direct report's role may differ widely from the team member's understanding or perception. Reviewing the skills (Job Description) for each direct report role and identifying examples of successful performance for each expectation, helps to mitigate potential biases that are natural in the rating process. Once the activity is complete, having a meeting to share this information with all team members within that role helps to establish a level of trust and sense of equity as each person will know how you define "success" in the role. This can be used during your ongoing conversations to help the team member grow and develop to their desired level of performance. **TIP:** Check out the Values and Competencies Behavioral Rating Guides for examples of this process.
- **Underperformers & Situational Failures**
  Setting clear expectations for each role, providing support along with removing barriers to success, and documenting specific examples of performance helps to establish a performance baseline. Referencing these elements during your ongoing conversations provides opportunities for continuous improvement and alignment to meaningful work. When things go wrong, demonstrating an 'Us vs the Problem' instead of an 'Us vs Them' attitude will more rapidly engage the talented minds on your team toward successful solutions, standard work, and process improvements. **TIP:** Documenting and recognizing evidenced improvement helps to encourage continued success and a healthy 'fail forward' mentality.

- **It's a Two-Way Street – Dialogue not Monologue!**
  Team members have a vital role in the work relationship and success of the team, organization, and personal performance. We know ourselves better than anyone else, so leverage that knowledge. Having the team member's voice in process improvements, goal setting, and identifying how their role has a direct/indirect impact on patient and customer outcomes builds a sense of pride, respect, empowerment, and purpose which helps to drive engagement.
  Together, we make a difference!