

## Senior Medical Staff Performance Appraisal Guiding Document

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For the purpose of this document the Senior Medical Staff member undergoing the performance review is referred to as “employee” and the Medical Leader conducting the review is referred to as “manager”

### Guiding Principle

All senior medical staff (SMS) should have a performance discussion with their manager at least once a year.

### Rationale

It is acknowledged that due to the unique duties and responsibilities of SMS, the generic Give Me 5 template that is currently utilised for Monash Health employees does not cover requirements of DHHS Credentialing and Performance Enhancement policy or the requirements of the National Quality and Safety Health Services Standards.

The Senior Medical Staff Performance Appraisal Tool is competency based and uses framework of essential clinical competencies to assess performance. These competencies are also in line with the Monash Health Clinical Governance Framework.

The tool is also designed to facilitate an open and productive discussion on current performance against professional competencies and Monash Health strategic priorities and planned development activities for Senior Medical Staff including Unit Heads, Service Directors, Deputy Program Directors and Program Directors.

### Purpose

- To provide a tool for regular performance review of SMS throughout the credentialing cycle thereby providing a robust and evidence-based approach to re-credentialing.
- To create an environment in which SMS feel empowered and engaged in driving quality two-way conversations with their manager about their contributions and performance at work.
- To assist with the ongoing development of the collaborative workplace culture and communication between SMS and managers.

### Process

- As the performance appraisal tool is designed to facilitate a two-way discussion, it is required that the employee provides a copy of the completed performance appraisal tool to the manager prior to the meeting to allow the manager time to review prior to the meeting.
- The discussions should be at least 45 minutes in duration
- It is essential that feedback be provided throughout the year, not only during the performance appraisal meeting
- The performance appraisal tool has the following sections:
  - My Individual Performance Review
    - Competency based self-assessment of performance in the past year by the employee. The self-assessment including discrepancies in ratings are then discussed with the manager. This is an opportunity for the employee to reflect on manager to provide feedback
    - Assessment of clinical performance by the manager should be as objective as possible and may take into account results from the following quality processes which have been relevant to the employee:
      - Mortality and Morbidity reviews
      - Case Discussions
      - Clinical audits

- Formal peer reviews
  - Clinical indicators
  - Patient satisfaction or complaints
  - Adverse occurrence screening / targeted case note reviews
- My Achievements and Challenges
  - Individual achievements and successes are outlined
  - Opportunity to recognise good performance
  - Opportunity to discuss challenges within the role and supports required to address the challenges
- My Performance Plan
  - Individual professional development plans are documented including college CME activities, conferences, course secondments, clinical support duties etc. that the employee intends to undertake during the next 12 months.
  - Individual goals should align with Monash Health strategic goals.
- Credentialling and Scope of Practice
  - Opportunity to review current credentials, scope of practice
  - Opportunity to review current job plan and make any mutually agreed changes
  - Opportunity to discuss leave plans. All leave requests need to be submitted via Kronos.
  - For details on how to request leave on Kronos, please click the link below:
    - [Work Instructions – Kronos ‘Apply for leave via my requests’](#)
- My Mandatory Training
- Manager and Employee to keep a copy of completed performance appraisal. This copy would be referred to at the subsequent year’s appraisal to monitor completion of performance plans.
- To ensure that completion of performance appraisals are captured on the organisational systems for the purposes of reporting, Unit Heads are required to complete the following spreadsheet: [Performance Review Record](#) and then email it to: [performancereviews@monashhealth.org](mailto:performancereviews@monashhealth.org).
- Employees to enter the performance review date on ESS as a record of completion.
  - [Instructions for recording Performance Review direct to Employee Self Services \(ESS\)](#)