



EVALUATION FORM
Direct Care Staff

Date of Hire: 8/3/20 Name: Lissa Shephard Date: 3/11/21

A. The following categories represent the major scope of the employee's responsibilities. Each area is to be rated by the employees supervisor. Based on the 3 items listed below, please check the rating box for each category which most closely identifies the employee's annual performance and competency levels.

1. YES (Y): All standards/expectations are met in that Category.
2. NO (N): None if the standards/expectations were met in that Category.
3. INCOMPLETE (I): Some of the standards/expectations were met in that Category.

Competency Category	Y	N	I	Explanation of Rating
Employee Attendance: On time, no call offs, work attendance within policy guidelines. As evidenced by Time Sheets.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Completes electronic & paper documentation correctly at the end of each shift. As evidenced by incomplete documentation. (unfinalized notes, unsealed forms, incomplete data on paper documentation)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Mandatory Reporting is done on time, when required. (ie: abuse, neglect, AWOLs, etc..) As evidenced by Incident Report or Reports from internal or external parties.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Follows all company Policies and Procedures. As evidenced by no Progressive Actions.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Completes assignments from Management Staff. As evidenced by Home Manager or no Progressive Actions.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Complete shift duties, including daily cleaning tasks, assists & interacts with residents and follows activities schedule. As evidenced by Progress Notes, no Progressive Actions and appearance of home.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Prepares, implements and follows the Dietary needs of all residents. (Menus, Diet Orders) As evidenced by documentation on menus and observation of meals being served.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Mandatory meetings and trainings attended. As evidenced by Sign-in Sheets or Training documentation.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
For assigned Residents, adheres to the Treatment and/or Behavior Plans goals and objectives. As evidenced by Progress Notes.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	



BEACON Specialized Living

EVALUATION FORM

Direct Care Staff

Strengths:

1. Picks up shifts at other homes
2. works well ~~to~~ with all residents

Areas for Development:

1. needs to read more on policies and get familia
2. interpersonal skills

B. Please state at least two goals/objectives you would like to accomplish in the next year:

1. Goal: Become a lead staff.
How will I get there?: By leveling up and doing required paperwork
2. Goal: Become a manager
How will I get there?: Leveling up and learning all protocols required

Are annual In-Service Trainings complete?

If no, when are they scheduled? _____

Yes No

Is TB test current (3 years)?

If no, one needs to be scheduled immediately.

Yes No

Is Annual Health Review Form current?

If no, one needs to be filled out immediately.

Yes No

Is Driver's License current/valid?

If no, needs to be renewed immediately.

Yes No

Jissa Shepherd
Employee Signature

3/11/21
Date

Bob Perce
Evaluator's Signature

3/11/21
Date



*Residential Direct Support Professional
Level System Level I to Level II*

- At least 90 days of continuous service before Level II consideration
If requirement not met, at least 30 days of continuous service in Level I for reconsideration
- Confirmation of completed training
-
- Recommendation from Home Manager Completed within Clarity Form follow-up communication
-
- Completion of at least one clinical module located under "training" on the Employee Website
Name of training completed: Autism Spectrum Date: 3/11/21
- Culture of Gentleness Training Completed Date: _____
- Demonstrated proficiency in the following computer applications:
 Clarity NextStep ADP Facility Dude MakeShift
-
- Understands and is aware of the location and use of home binders and postings
- Understands the process of shift change and resident morning meetings
- Understands the materials and importance of the content on the "high alert boards"
-
- Any outstanding or current recipient rights or licensing violations reviewed and discussed with VP of Operations and HR
- No active progressive actions while in Level I (written/suspension)
-
- Successfully passed a minimum of two medication passes in the past 90 days
Date of Med Pass One 3/10/21 Date of Med Pass Two 3/11/21
-
- Good attendance record (e.g. no unexcused call-off's, attendance to all mandatory meetings, trainings or has an excused absence)
-
- Displays honesty, integrity, trustworthiness
- Demonstrates full understanding of Mission, Values, Goals How to apply "I" Care Philosophy in daily work environment (Integrity, Compassion, Advocacy, Respect and Excellence)



Residential Direct Support Professional Level System Level I to Level II

Understands the PCP/BP connection, able to apply both PCP goals objectives and BP Knows what to track & when to demonstrate application of linking goals and ways to accomplish the goals

Required paperwork is complete, accurate, factual, timely, and neat
Increased competence with computer application/able to follow-through on tasks

Understanding and application of HCBS Guidelines

Works well with Residents, confident, has a trustworthy respect from and for the Residents

Job responsibilities expectations are successfully and consistently met

Understands On-Call Procedures:

Medical

Clinical

Maintenance

Home

Knows all relevant policies and procedures and has a track record of adhering to the policies. Can go to website for clarification and/or reference

Willing to take on additional responsibilities when requested with a smile

Understanding of referral acknowledgment policy and demonstrates knowledge of conflict resolution process within the organization, universal precautions; infection control; HIPAA; emergency shut offs, medication administration; OTC PRN protocol; personal cell phones; assignment of residents, smoking policy; special diets; sharps, temperature logs, phone call etiquette, hand-off communication

Demonstrates understanding of the Menu and Food Substitution Process

Understanding of CPRT Team Meetings, Root Cause Analysis and Medication Non-Compliance Intervention Processes

Works well with other staff - consistently displays a positive attitude, communication takes direction, problem solves with peers, part of the solution/process, trust others, willingness to listen

WAGE: \$11.00

Each level will have an advancement evaluation, advancement competency test addressing objective and subjective elements, and recommendation by the site supervisor. Candidate must successfully pass the competency test and evaluation. Each candidate must pass a drug test/criminal/vehicular background check. Shift changes may be required.