**Annual Reviews for First Year Employees AASL Company Procedure**

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Annual reviews are an integral part of your role here as an employee. This provides an opportunity for growth and reflection. It also serves as a time for you to be reminded of how you are appreciated here at AASL!

# Annual Reviews – First Year Employee/Clinical Fellows

* 1. Your annual review will be scheduled by the CM/Executive Council around the time of your first-year anniversary (or at the end of your CF year, if applicable).
  2. You are to identify two team members you would like to complete your peer review no later than one business day after your review is initiated. This will provide ample time for the peers to complete the review prior to your meeting. This may be anyone in any department, however be mindful of making appropriate choices (i.e., if you don’t treat in the same office as someone, don’t choose them as a reviewer). Please Note: Peer review feedback is anonymous to the team member who is receiving their annual review except to the CM and Executive Council.
     1. You will have two peer reviewers of your choice, your CM will choose an additional two reviewers, and your CM will have feedback as well. The CM will notify reviewers via email and provide necessary forms and a date for completion.
  3. CM or Executive Council will inform you of the scheduled date of your review.
  4. After you receive notification of your upcoming review, you will complete the self-review on the Employee Website and send back to your CM *at least one week prior* to the scheduled review meeting.
  5. Once submitted, the CM will compile peer feedback and your self-review to submit to Executive Council for review (Areas of Strength, Areas to Improve). This means it is crucial as a reviewer that you complete assigned reviews by the proposed date.
  6. The finalized/consolidated review form from the CM will be utilized in your meeting and then given to you upon submission of your annual goals.
  7. After your review meeting, you are responsible for completing the following:
     + Annual goal setting (due no more than 2 weeks following review)
     + Anything else that may be pertinent relative your annual review meeting

# Self-Review Questions

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Division: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Annual Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Overview:
   1. What did I do well this year? What have I done well to maximize my job at AASL?
   2. What could I improve upon from my performance this past year?
   3. What were my goals last year? Did I meet them? If not, why?
2. Stats:
   1. How did I use the weekly stats to guide me in my roles and responsibilities? Why do we use statistics to guide our day-to-day roles and responsibilities?
   2. What is my average percentage of arrival? Average advanced schedule? Average number of cancellations?
   3. Am I meeting company productivity expectations in regards to billable hours? What can I do to ensure meeting company productivity expectations?
   4. Why do company productivity expectations exist?
   5. How could I improve upon having higher statistics going forward?
   6. Did I take advantage of earning Incentive pay this year? How can I use my knowledge of my personal statistics to goal-set for meeting Incentive pay being offered?
3. Hat:
   1. How do I incorporate the Mission and Vision of AASL into my role as a therapist?
   2. Do I know and understand my Division’s Valuable Final Product and have all my actions align to work to attain it?
   3. What therapist subproducts do I do well? What therapist subproducts do I need to improve upon? Pick 3 for each question.
   4. What documentation is easiest to complete? What documentation is the hardest for me to complete? Please explain.
   5. In regards to the quality of my documentation (i.e. report-writing, note-writing, etc.), what area(s) can I improve upon? What company tools have helped me in the quality completion of my work and/or what other tool may be beneficial for me and my team to have/use?
   6. Do I exude positive communication across all aspects of my position and amongst staff and clients at AASL?
   7. How have I contributed to internal referrals, friend and family referrals, and internet referrals?
   8. What skills, duties and responsibilities do I do well? What skills, duties and responsibilities do I need to improve upon? Pick 3 for each question.
   9. How have the Therapist Hat Procedures aided my responsibilities?
   10. How did I maximize the number of AASL clients reached/serviced on a daily/weekly basis? What ideas do I have of how I can continue to maximize our AASL client reach/impact? Or how the company can?
   11. What did I do as a therapist to maximize my weekly schedule this past year (i.e. using advanced schedule, using downtime, planning, etc.)? What have I done well at in maximizing my schedule and what can I improve upon?
   12. How did I maintain high quality care for my clients?
   13. What planning and preparation (i.e. tools, materials, research, CEUs, etc.) has helped me work with my clients this past year? Has or can this information be shared with team members so they can also benefit as I have? Please explain.
   14. Outside of my direct role as a therapist, how did I help AASL in marketing efforts (i.e. internal and external referrals, campaigns, blog writing, social media, etc.)?
   15. How did I work with Front Desk or with families directly to recover cancelled and no-show appointments, along with making sure re-schedules happened?
   16. Overall, did my actions add any additional profitability to the company of which I could potentially be rewarded? I.e. Did I go above and beyond to contribute to the bottom line of the company with respect to my division?
4. Manager Meetings (if applicable):
   1. How did I prepare for my meeting with my manager each week?
   2. What was beneficial about these meetings?
   3. What could I improve upon in preparing for these meetings and following up with my manager weekly?
   4. What are my suggestions for improving these meetings going forward?
5. Trainings (if applicable):
   1. How did company trainings (if any were assigned to me) help me as a therapist, teammate, and communicator in my role at AASL? (Please answer this question only if you have completed Trainings assigned to you by CM or EC).
6. Policy and Procedure:
   1. What has been beneficial about having policies and procedures documented within the company and my respective division?
   2. What are my suggestions for improving: 1) what policies and procedures need to be written but are not currently, and 2) how they are issued/handled at this time?
7. Company Divisions:
   1. How is it going in your daily communication and working with the Front Desk Receptionist? Please explain. Please provide feedback or suggestions for improvement in this Hat going forward so AASL can continue to improve and be better as a whole.
   2. How is it going in your daily communication and working with the Finance Division? Please explain. Please provide feedback or suggestions for improvement in this division going forward so AASL can continue to improve and be better as a whole.
   3. How is it going in your daily communication and working with the Marketing Division? Please explain. Please provide feedback or suggestions for improvement in this division going forward so AASL can continue to improve and be better as a whole.
   4. How is it going in your daily communication and working with the Quality Division? Please explain. Please provide feedback or suggestions for improvement in this division going forward so AASL can continue to improve and be better as a whole.
   5. How is it going in your daily communication and working with the Client Services Division and Patient Scheduling? Please explain. Please provide feedback or suggestions for improvement in this division going forward so AASL can continue to improve and be better as a whole.
   6. How is it going in your daily communication and working with AASL Clients? Please explain. Please provide feedback or suggestions regarding your/our relationship and communication with AASL Clients.
   7. How is it going in your daily communication and working with your Colleagues, both within your respective division and outside your division? Please explain. Please provide feedback or suggestions for improvement going forward so AASL can continue to improve within the Clinic Division and be better as a whole.

# Self-Review Template

Feel Free to use this template to type your answers in for the respective sections of the Self-

Review.

Self-Review

Team Member:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Division: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Annual Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Overview:

a.

b.

c.

2. Stats:

a.

b.

c.

d.

e.

f.

3. Hat:

a.

b.

c.

d.

e.

f.

g.

h.

i.

j.

k.

l.

m.

n.

o.

p.

4. Manager Meetings:

a.

b.

c.

d.

5. Trainings:

a.

6. Policy and Procedure:

a.

b.

7. Company Divisions:

a.

b.

c.

d.

e.

f.

g.

# Annual Review Goal Sheet

Completion date for the goals below will be at the time of your next annual review.

Criteria for Annual Goals

* One goal must be related to clinical skill development/CEU or learning opportunities
* One goal must benefit the team (in-service, presentation, creating a material, etc.)
* One personal goal that improves your hat responsibilities/role at AASL

1.

2.

3.

DUE NO MORE THAN ONE WEEK FOLLOWING YOUR MEETING.

Updated December 2023