



**MEDOCARE HEALTH SYSTEMS, INC.  
PERFORMANCE APPRAISAL FORM**

(Version 1.0 January 2021)

**For Rank & File to MT2**

**General Information**

<b>Name of Employee :</b> <b>Name of Manager :</b> <b>Appraisal Period :</b>	<b>Designation :</b> <b>Department :</b> <i>Check if employee has been in the position for less than three months.</i> <b>Too New To Rate ( Interim) :</b> <input type="checkbox"/> <b>Too New To Rate (Year-end) :</b> <input type="checkbox"/>
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**Part I : Key Result Areas (KRAs)**

**70%**

Both the employee/ratee and the rater should complete the designated portion below focusing on established Key Result Areas (KRAs) or performance objectives. Results achieved shall be provided by the employee/ratee. Please enumerate Key Performance Indicators (KPIs) for every KRA. In addition to the comments, each KRA should have an equivalent rating (1 to 5) and on the question on target, a corresponding response of "YES" or "NO" should be checked.

KEY RESULT AREAS	EMPLOYEE'S ASSESSMENT	MANAGER'S ASSESSMENT
KRA 1 :	Results Achieved	
Key Performance Indicator(s) :	INTERIM APPRAISAL PHASE	
	On target ? <span style="color: green;">Yes</span> <input type="checkbox"/> <span style="color: red;">No</span> <input type="checkbox"/> Numerical Rating (1 to 5) <input style="width: 50px;" type="text"/> Comments :	On target ? <span style="color: green;">Yes</span> <input type="checkbox"/> <span style="color: red;">No</span> <input type="checkbox"/> Numerical Rating (1 to 5) <input style="width: 50px;" type="text"/> Comments :
	Results Achieved	
	40 accounts per month, average	
	YEAR-END APPRAISAL PHASE	
	On target ? <span style="color: green;">Yes</span> <input type="checkbox"/> <span style="color: red;">No</span> <input type="checkbox"/> Numerical Rating (1 to 5) <input style="width: 50px;" type="text"/> Comments :	On target ? <span style="color: green;">Yes</span> <input type="checkbox"/> <span style="color: red;">No</span> <input type="checkbox"/> Numerical Rating (1 to 5) <input style="width: 50px;" type="text"/> Comments :

KEY RESULT AREAS	EMPLOYEE'S ASSESSMENT	MANAGER'S ASSESSMENT
KRA 2 :  Key Performance Indicator(s) :	<b>Results Achieved</b>	
	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
	<b>Results Achieved</b> 15 average "mixed calls" per d	
	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
KRA 3 :  Key Performance Indicator(s) :	<b>Results Achieved</b>	
	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
	<b>Results Achieved</b>	
	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :

KEY RESULT AREAS	EMPLOYEE'S ASSESSMENT	MANAGER'S ASSESSMENT
KRA 4 :  Key Performance Indicator(s) :	<b>Results Achieved</b>	
	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
	<b>Results Achieved</b>	
	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
KRA 5 :  Key Performance Indicator(s) :	<b>Results Achieved</b>	
	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>INTERIM APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :
	<b>Results Achieved</b>	
	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :	<b>YEAR-END APPRAISAL PHASE</b> On tagret ? <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> Numerical Rating (1 to 5) <input type="text"/> Comments :

SAMPLE ONLY

**Part II : Core Competencies**

30%

Both the employee/ratee and the manager/rater should complete the designated portion below focusing on major strengths and development needs. For comments, the upper portion is for the employee/ratee and the lower portion for the manager/supervisor.

PERFORMANCE CRITERIA	INTERIM APPRAISAL PHASE		YEAR-END APPRAISAL PHASE	
	Comments	Rate	Comments	Rate
<p><b><u>Planning and Organizing Work</u></b> Effectiveness displayed by the Ratee in establishing work priorities, developing sequences of action and utilizing budgetary and staff resources in accomplishing assignments/duties.</p>	Employee		Employee	
	Manager		Manager	
<p><b><u>Application of Analytical, Technical and Conceptual Skills</u></b> Technical competence as well as the degree to which the Ratee had logically analyzed issues, information, data, situations, etc ... and conceptualized solutions, ideas and proposals.</p>	Employee		Employee	
	Manager		Manager	
<p><b><u>Quality, Accuracy and Timeliness of Work</u></b> The extent to which the Ratee's work exhibited completeness, correctness, attention to detail (no loose ends), promptness (completed on time) and professionalism.</p>	Employee		Employee	
	Manager		Manager	

SAMPLE ONLY

PERFORMANCE CRITERIA	INTERIM APPRAISAL PHASE Comments		Rate	YEAR-END APPRAISAL PHASE Comments		Rate
<p><b><u>Oral and Written Communication Skills</u></b> The extent to which the Ratee presented orally and/or in writing material/information, views/ideas in a clear, concise and effective manner.</p>	Employee		Employee			
	Manager		Manag			
<p><b><u>Productivity and Initiative</u></b> Volume of work output against job requirements within a given time frame. Extent to enterprise, energy and commitment to deliver.</p>	Employee		Employee			
	Manager		Manager			
<p><b><u>Innovativeness</u></b> The extent to which the Ratee was able to demonstrate innovativeness and creativity in delivering results.</p>	Employee		Employee			
	Manager		Manager			

SAMPLE ONLY

PERFORMANCE CRITERIA	INTERIM APPRAISAL PHASE Comments		Rate	YEAR-END APPRAISAL PHASE Comments		Rate
<u>Client Orientation</u> The extent to which the Ratee demonstrated concern for client needs (INTERNAL and EXTERNAL) and willingness to address these.	Employee		Employee			
	Manager		Manager			
<u>Teamwork</u> The degree to which the Ratee effectively interacted, cooperated and coordinated with other staff in the work units in the organization in reaching the corporate objectives.	Employee		Employee			
	Manager		Manager			
<u>Others (e.g. Attendance and Punctuality)</u>	Employee		Employee			
	Manager		Manager			

SAMPLE ONLY

**Part III : Over-all Narrative Assessment (Critical Dimension)**

First part is self assessment (to be completed by Ratee)

This should capture the major strengths and recommend actions to improve effectiveness and productivity

INTERIM APPRAISAL PHASE	YEAR-END APPRAISAL PHASE
<b>Strengths</b>	
<b>Actions proposed to improve performance</b>	

**For the Supervisor/Rater**

This should capture the current strengths and developmental needs of the employee focusing on the evaluation results of Parts 1 and 2.

INTERIM APPRAISAL PHASE	YEAR-END APPRAISAL PHASE
<b>Current Strengths</b>	
<b>Current development needs</b>	

SAMPLE ONLY

### Part IV : Signature and Comments

Your signature below acknowledges that a discussion between an employee and manager has occurred. Upon discussion, both must sign on the space provided below to signify acceptance and agreement to the results of the evaluation. If the Ratee has some questions or concerns that remained unresolved after the dialogue, he/she is required and state (under comments) the pending issues for resolution.

INTERIM APPRAISAL PHASE		YEAR-END APPRAISAL PHASE	
Comments (if any) :		Comments (if any) :	
APPROVAL/CONCURRENCE		APPROVAL/CONCURRENCE	
Signature of Employee (Ratee)	Date	Signature of Employee (Ratee)	Date
Signature of Supervisor/Manager (Rater)	Date	Signature of Supervisor/Manager (Rater)	Date
NEXT LEVEL MANAGER APPROVAL		NEXT LEVEL MANAGER APPROVAL	
<input type="checkbox"/> Approved as is <input type="checkbox"/> Approved with comments <input type="checkbox"/> Not Approved		<input type="checkbox"/> Approved as is <input type="checkbox"/> Approved with comments <input type="checkbox"/> Not Approved	
Comments (if any) :		Comments (if any) :	
Signature of Next Level Manager	Date	Signature of Next Level Manager	Date



**PERFORMANCE RATINGS**

- ☞ 5.00 - Performance consistently exceeds position requirements
- ☞ 4.75 - Performance meets and 80% exceeds position requirements
- ☞ 4.50 - Performance meets and 70% exceeds position requirements
- ☞ 4.25 - Performance meets and 60% exceeds position requirements
- ☞ 4.00 - Performance meets and frequently exceeds position requirements
- ☞ 3.75 - Performance meets and 40% exceeds position requirements
- ☞ 3.50 - Performance meets and 30% exceeds position requirements
- ☞ 3.25 - Performance meets and 20% exceeds position requirements
- ☞ 3.00 - Performance meets and may occasionally exceed position requirements
- ☞ 2.00 - Performance meets and many but not all position requirements
- ☞ 1.00 - Performance does not meet position requirements

OVER-ALL ASSESSMENT : Interim (Jan 01 to Jun 30)		OVER-ALL ASSESSMENT : Year-end (Jul 01 to Dec 31)	
<b>PART I - Key Result Areas (KRAs)</b>	<b>0.00</b>	<b>PART I - Key Result Areas (KRAs)</b>	<b>0.00</b>
<b>PART II - Core Competencies</b>	<b>0.00</b>	<b>PART II - Core Competencies</b>	<b>0.00</b>
<b>TOTAL SCORE : PART I + PART II</b>	<b>0.00</b>	<b>TOTAL SCORE : PART I + PART II</b>	<b>0.00</b>

===== **FOR HR USE ONLY** =====

<b>INTERIM APPRAISAL RATE</b>		<b>YEAR-END APPRAISAL RATE</b>	
Remarks :		Remarks :	
Date Received :		Date Received :	