

**Additional Information
Submitted by Appellant**

Staff Performance Review Form

Employee Name:	Crystal Chow	Evaluation Reason (check all that apply):	<input type="checkbox"/> 6 month <input type="checkbox"/> 1 year <input checked="" type="checkbox"/> Focal/Annual
Employee ID:	3911	Evaluation Period(s):	4/01/2021-4/01/2022
Job Title:	Social Worker	Evaluator Name: Evaluator ID:	Wanda Chin (178)

Rating Guide

Leading – Consistently exceeds all expectations of the role in this area.
Meeting – Consistently meets all the expectations of the role in this area.
Developing – Consistently meets some of the expectations in this area and has room for improvement.
Underperforming – Doesn't consistently meet the expectations of the role in this area and significant improvement is needed.

Key Job Responsibilities	Leading	Meeting	Developing	Underperforming
Clinical practices <ul style="list-style-type: none"> Establishes and maintains therapeutic relationship with participants and their family/support system. Administers psychosocial evaluations and provides treatment. Upholds ethical and legal responsibilities. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Management <ul style="list-style-type: none"> Identifies ways to enhance quality of life. Coordinates services and resources. Demonstrates advocacy and acts as liaison. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation <ul style="list-style-type: none"> Timely Complete Accurate Measurable 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Work <ul style="list-style-type: none"> Actively participates in team discussions. Negotiates, compromises and supports team plan. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Comments	Supervisor Comments			



<p>It has been a challenging year for SW and for families due to covid. As a SW, I try to advocate for prts and their families to improve their quality of life and stay safe at home during the pandemic.</p>	<p>Crystal continues to work hard to provide support and services to the prts and their families. As Crystal noted, it has been a challenging year as Covid continues to limit center attendance which is proving to be difficult for many prts and their families. This said, Crystal continues to provide needed clinical services, case management and support.</p>
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Core Values	Definition	Self-Rating	Supv. Rating
Compassion	We care for each other, our partners and the people we serve. We act with empathy, kindness and a desire to help.	Leading	Leading
Excellence	We set high standards and we strive to be the best we can be in everything we do. This takes integrity, quality, innovation, collaboration, resilience, skills and learning.	Leading	Meeting
Resourcefulness	We steward resources in an effective and responsible way. We think creatively to solve problems and innovate.	Leading	Meeting
Inclusivity	We create an environment of collaboration and respect the voices, experiences, and interests of diverse cultures and society groups. We create a sense of belonging and dignity for all.	Leading	Leading

Critical/Key Competencies	Self-Rating	Supv. Rating
Adaptability/Flexibility	Leading	Leading
Attendance	Leading	Meeting
Collaboration/Teamwork	Leading	Meeting
Communication/Reception of Feedback	Meeting	Meeting
Judgment/Critical Thinking	Leading	Meeting
Quality of Work	Leading	Meeting
Reliability	Leading	Meeting
Resilience	Leading	Leading

Safety	Leading	Leading
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Achievements	Staff Comments	Supervisor Comments
Major strengths:		Crystal is flexible, open to constructive feedback, and is always open to take on tasks and responsibilities if asked. Crystal is compassionate and through her work with the prts she demonstrates how much she cares for the prts.
What accomplishments or achievements do you want to especially recognize and celebrate (i.e. goals achieved, creating something new, new way of working, contribution to a project etc.)?	Hero Award. People Dept. choose/volunteered Jade Social Worker to be interviewed for the Social Work Month in March.	Crystal has learned to navigate EPIC and have successfully transitioned to the EPIC system - able to view prt information and to document services rendered.
Areas for growth and improvement:	Want to pass my LCSW Exam. Improve communication when talking to families to present misunderstands.	I agree with Crystal's growth areas. Crystal's continuing awareness of word choice when communicating with prts and their families will help to keep the conversation directed at the issue/concern at hand and avoid any possible perception of being judged.
Ways On Lok can support you in the coming year with the above	I have received guidance from supervisor. Relationship with family improved and gained trust from family. I will need to continue to receive support and guidance from supervisor PRN. Thanks.	To support Crystal in her area of growth, would like Crystal to the take time to think about what approach and words she will use when speaking to a prt and/or their families about a prt's behavior that needs improvement. Then as needed, consult with her SW Lead and/or supervisor for feedback.
goals and areas of growth and improvement.	Pass LCSW Exam and improve communication with families.	See above

Overall Rating	Leading	Meeting or Developing	Not Meeting
Overall Rating	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Future Planning and Commitment	Staff Comments	Supervisor Comments
Goals for the next year:	Learn more about EPIC. Pass LCSW Exam	1.Continue to expand skills set in EPIC to become more proficient and to utilize new features/releases. 2.Meet with SW Lead monthly for case reviews, support in light of SW staffing shortage, and to further develop to clinical skills set, understanding of On Lok P&Ps revisions, and new/revised protocols especially as it relates to the changing Covid environment. 3.Assist with CMS audit preparedness for audit readiness.
Career and professional development goals:	1.Pass LCSW Exam 2.Take more Social Work related classes to improve clinical and assessment skills	Further develop EOL/Palliative Care skills and knowledge-based to deepen the ability to support prts and families.
Comments		
Staff Comments	Supervisor Comments	
Thank you for Serena's leadership for leading our IDT team during the pandemic. Thank you for our Jade Social Work Team working together to help out each other throughout the pandemic with our clients and families.	Thank you, Crystal, for the work you have been doing with the prts and their families. Your ability to provide support and services to the prts as you work from home and onsite at the center has helped the SW department in the SF region achieve a 97% satisfaction score in the prt satisfaction I-SAT survey for 2021.	

Employee Signature:	Crystal Chow, MSW, ASW	Date: 7/13/2022	
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Evaluator Signature:	Wanda Chin	Date: 7/13/2022	Click or tap here to enter text.
Director Signature:		Date:	Click or tap here to enter text.



Staff Performance Review Form

Employee Name:	Crystal Chow	Evaluation Reason:	Focal Review
Employee ID:	3911	Evaluation Period(s):	2020
Job Title:	Social Worker	Evaluator Name: Evaluator's ID:	Wanda Chin (178)

Rating Guide

Leading – Consistently exceeds all expectations of the role in this area.

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Developing – Consistently meets some of the expectations in this area and has room for improvement.

Underperforming – Doesn't consistently meet the expectations of the role in this area and significant improvement is needed.

Key Job Responsibilities	Leading	Meeting	Developing	Underperforming
1. Clinical practices: <ul style="list-style-type: none"> Establishes and maintains therapeutic relationship with Participants and their family/support system Administers Psychosocial evaluations and provides treatment Upholds Ethical and Legal responsibilities 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Case Management: <ul style="list-style-type: none"> Identifies ways to enhance quality of life Coordinates services and resources Demonstrates advocacy and acts as liaison Provides financial management 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Documentation: <ul style="list-style-type: none"> Timely Complete Accurate Measurable 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Team Work: <ul style="list-style-type: none"> Actively participates in team discussions Negotiates, compromises and supports team plan 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Core Values	Definition	Self-Rating	Supv. Rating
Compassion	We care for each other, our partners and the people we serve. We act with empathy, kindness and a desire to help.	Meeting	Leading
Excellence	We set high standards and we strive to be the best we can be in everything we do. This takes integrity, quality, innovation, collaboration, resilience, skills and learning.	Meeting	Meeting
Resourcefulness	We steward resources in an effective and responsible way. We think creatively to solve problems and innovate.	Meeting	Meeting
Inclusivity	We create an environment of collaboration and respect the voices, experiences, and interests of diverse cultures and society groups. We create a sense of belonging and dignity for all.	Meeting	Meeting

Critical/key competencies during COVID-19	Self-Rating	Supv. Rating
Adaptability/Flexibility/Pivot	Meeting	Meeting
Collaboration	Meeting	Meeting
Communication	Meeting	Meeting
Resilience	Meeting	Meeting

COVID Achievements	Staff Comments	Supervisor Comments
What new skills and knowledge were developed or additional tasks taken on during the pandemic?	<p>I adapt in a fast manner w/ changing environment working at home w/ challenging internet access and finding a space where there is no distraction to concentrate for my work.</p> <p>Home visits made me practice more on my driving skills and learn more about the environment where our prts live and assess their home and how they adapt to the pandemic. Driving Downtown/Tenderloin continue to be a challenge w/ parking & traffic. I find other modes of transportation to complete my home visits.</p> <p>I learned more about the covid disease, prevention, doffing and donning PPEs.</p>	<p>Due to the Covid pandemic and On Lok's system outage, Crystal quickly learned and adapted to the using zoom for IDT meetings and communicating with prts and their families, as well as migrating to the zoom phone platform. In addition, she learned about Covid, infection control measures and protocol and supporting the prts and their families throughout the pandemic. As noted by Crystal, with the temporary closure of the center and limited attendance as the center reopened, Crystal made more home visits which increased her awareness of the living situations/environment of the prts. Crystal also began to learn On Lok's new EHR system – EPIC.</p>
What personal accomplishments or achievements during COVID-19 do you want to especially recognize and celebrate? (i.e. goals achieved, creating something new, new way of working etc.)	<p>I will continue to learn more about different types of technology to help me do tasks quicker. It has been quite challenge to manage a high case load, home visits, placements and manage crisis prts. in a timely manner, but I did it. My body responded having difficulty to have quality/restful sleep.</p> <p>On Lok serves culturally diverse population and staff who are able to speak prts' languages conserve resources for the agency and easier to build up relationships with prts and their families. Has On Lok ever thought about having a bilingual program for employees who take an bilingual exam. If staff pass the bilingual exam, they will receive a monthly extra pay ie like a stipend.</p>	<p>The Covid pandemic created an opportunity for Crystal for learn how to utilize technology which she notes has increased her ability to be more efficient. In addition, having to WFH while providing services to the prts resulted in the development of an alternative way of serving the prts. As On Lok continues to have the option of WFH and as On Lok further develops the hybrid model of care (combining care and services in the center and in the prts' homes), it will be Crystal's task to determine how to be efficient and effective in meeting the needs of the prts in both situations/settings.</p>



Staff Performance Review Form

Overall Rating	Leading	Meeting or Developing	Not Meeting
Overall Rating	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Future Planning and Commitment	Staff Comments	Supervisor Comments
Goals for the next year: (career and professional development)	I want to manage an appropriate (whatever that might be) caseload. I want to pass my LCSW exam in 2021.	I agree with Crystal's goal.
Areas for growth and improvement:		Continue to increase familiarity and skills in using and documenting in EPIC.
Ways On Lok can support you in the coming year with the above goals and areas of growth and improvement.	Noon guided meditation has help me to better manage my stress, but many times I was unable to attend the meditation sessions due to managing crisis or other tasks ie. Home visits have more priority over meditation. I am happy to see my prts as they are happy to see me in their homes. I wish I can spend more quality time with them, but due to many tasks need to be done, this is not possible. Hire more Social Workers so we can serve more prts and enroll more prts during the pandemic as many elders in the community need our services.	On Lok continues to recruit for an additional SW for the Jade team that will help to increasing census and prt panel management. On Lok will continue to offer EPIC trainings, refreshers, coffee shops to improve and enhance Crystals' EPIC skills set.

Comments	
Staff Comments	Supervisor Comments
Overall, I couldn't believe I survived the challenges of the covid. I find that I can adapt to many new challenges quickly in which I never have experienced in the past before. I am happy to work for On Lok with great leaderships and supportive colleagues.	Crystal has shown to be flexible and resilient throughout the Covid pandemic. In the process, she learned that she can adapt quickly to change and challenges. Congratulations, Crystal. Thank you for your compassion, commitment, and dedication to the prts during this period. The care and support you provided to the prts in their homes, in the center, via zoom and telephonically have helped to sustain the prt and their families.

Employee Signature:	Crystal Chow	Date: 7/13/2022	Click or tap here to enter text.
Evaluator Signature:	Wanda Chin	Date: 7/13/2022	Click or tap here to enter text.

Director Signature:		Date:	Click or tap here to enter text.
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RECEIVED

APR 29 2019

BY: _____

STAFF PERFORMANCE EVALUATION FORM

Employee Name: Crystal Chow

Eval Type: End Intro 1st Annual Focal

Employee Number: 3911

Eval Period: 4/1/18
To 4/1/19

Title: Social Worker

Evaluator: Andrew Lee - Jade Program
Manager; George Fogle - Regional Social
Worker Manager

Rating scale for Goals and Objectives: Met (MT), Partially Met (PM); Not Met (NM)

Section 1: Goals and Objectives For Current Review Period

Goals and Objectives	MT/PM/NM	Major Accomplishments Against The Goals
Objective #1: Improve documentation skills in Pacelink, making sure to be precise and on time with reporting.	MT	Crystal is timely in her Pacelink reports, and covers required items without need for improvement.
Objective #2: Compliance with care plans by tracking via calendar.	MT	Crystal is compliant in her care plan frequencies with participants and tracks all scheduling by calendar system.
Objective #3: Contribute to the growth of Jade team in terms of increasing 2019 census goals.	MT	Crystal participates in reaching Jade's 2019 census of 182.
Objective #4: Communication skills with team via email and during IDT.	PM	Crystal communicates well, but requires additional supervision and training in order to report in a timely manner that is also thorough with information. This includes: summary reviews, reporting follow-ups in a timely manner after IDT meetings, and general organizing/prioritizing skills.

Rating scale for Key Job Responsibilities and Performance Factors:

- **Extremely Effective (EE):** Highly skilled in the area – has a thorough understanding and is very proficient; displays a high quality of work; exceeds expectations; sets an example to the other employees – is a role model.
- **Fully Effective (FE):** Skilled in the area; meets expectations; performance is consistent in the area being assessed.
- **Moderately Effective (ME):** Has some of the necessary skills; is able to meet some of the critical expectations but not all; needs frequent assistance or instruction to accomplish tasks.
- **Not Effective (NE):** Lacks necessary skills to perform the task; unable to meet expectations satisfactorily.

Section 2: Key Job Responsibilities (as determined by department manager or management group)

Key Job Responsibility	EE/FE/ME/NE	Manager Comments
1. Clinical Practices <ul style="list-style-type: none"> • Establishes and maintains therapeutic relationships with participants and their family/support system. • Administer Psycho-social evaluations and provides treatment. • Upholds ethical and legal responsibilities. 	FE	Crystal is fully aware and personable in her interactions with participants. Her understanding and skills as Jade Social Worker are solid, and her participants appreciate her support.

<p>2. Case Management</p> <ul style="list-style-type: none"> Identifies ways to enhance quality of life Coordinates services and resources Demonstrates advocacy and acts as liaison Provides financial management 	ME	Crystal is able to identify life enhances options for Jade participants, and demonstrates a moderate level of efficiency when executing services and resources. There is room for improvement, as it is felt that Crystal can do so much more if she were to focus on presenting to IDT in a more organized manner.
<p>3. Documentation</p> <ul style="list-style-type: none"> Timely Complete Accurate Measurable 	ME	Generally, Crystal has the moderate skill-set to complete documentation based on On Lok requirements, but there is an inconsistency with regards to achievable outcome and measurability. This is something that will require additional guidance from Social Worker lead so that her information is concrete, detailed and well-defined.
<p>4. Team Work</p> <ul style="list-style-type: none"> Actively participates in team discussions Negotiates, collaborates and supports team plans 	FE	Crystal is present and active when it comes to team discussions, and is supportive in the collaborative efforts in providing optimal care and services to her participants.

Section 3: Performance Factors (based on the organization's goals and objectives):

Performance Factors	EE/FE/ME/NE	Manager Comments
<p>ATTENDANCE – Adheres to departmental expectations concerning attendance, time off requests, and punctuality.</p>	EE	Crystal adheres to the attendance. She is always one of the first to arrive to meetings, and submits time-off requests in a timely manner.
<p>TEAMWORK – Open to changes & new ideas; accepts constructive criticism; cooperates with supervisor; treats team members with respect; works cooperatively with others.</p>	EE	Crystal is very open to new ideas and changes. She is also open to constructive feedback, and shows respect for her IDT colleagues.
<p>COMMUNICATION – Communicates information effectively; communicates in an appropriate manner, volume & tone</p>	ME	Crystal is able to identify the needs of care and services for her participants, but requires additional supervision and guidance in executing information in a clear, organized and effective manner.
<p>JUDGMENT - Assesses situations & follows through appropriately; uses sound reasoning for decisions/problems solving; appropriately handles confidential information.</p>	FE	Crystal is able to assess situations with sound reasoning, and handles all cases with the utmost confidentiality.
<p>WORK QUALITY – Demonstrates required knowledge & skills; produces accurate work; makes proper use of work time; timely completion of work; produces quality results.</p>	ME	Crystal is able to demonstrate moderate knowledge when dealing with work that requires fully detailed information. It is felt that supervision and additional guidance will empower Crystal to perform at an optimal level.
<p>CUSTOMER FOCUS – Meets the needs of the internal and external customers; establishes and maintains effective relationships with customers and gains their trust and respect.</p>	EE	Crystal meets the needs of participants, while maintaining strong ties that affirm their respect and appreciation for her service.
<p>INITIATIVE – Offers helpful information and suggestions; accepts new responsibilities; works independently appropriately.</p>	FE	Crystal provides information when asked, and works well, both independently and in group settings.

SAFETY – Adheres to all On Lok safety policies and procedures, and reports safety concerns appropriately.	FE	Crystal adheres to all safety policies and procedures.
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Section 4: Overall Evaluation Rating
 This section is provided to summarize the overall performance during this period.

<input type="checkbox"/> Extremely Effective	<input checked="" type="checkbox"/> Fully Effective	<input type="checkbox"/> Moderately Effective	<input type="checkbox"/> Not Effective
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Comments:

As Jade Program Manager, it has been a delight working with Crystal. Her supportive presence is appreciated, as participants and colleagues find her to be personable and professional. I truly feel that Crystal has great potential, and I hope that with continued support and coaching, she will be able to provide optimal care and support services to the aging population of participants in her charge.

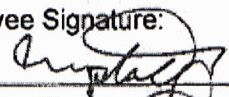
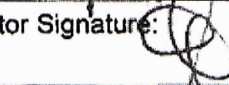
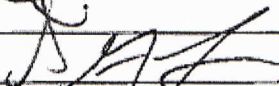
- SMART Goals:** A SMART goal answers these questions:
- **Specific** - What is specifically expected to achieve?
 - **Measurable** - What standard will be used to measure success?
 - **Attainable** - Does the employee have the necessary resources and skills?
 - **Relevant** - How does this relate to the organization/department goals, and the employee's role?
 - **Time-Limited** - What is the deadline?

Section 5: Goal Setting for Next Cycle
 This section is to clarify and agree to performance, development and career goals for the next performance cycle.

Goals for Next Cycle	Action Plans
Goals #1: Department Goal: To maximize role in assisting with growing the center's census to its target of 182.	Action plan for 2019-2020: 1. Be mindful of census as a priority. 2. Identify and trouble-shoot challenges related to census growth, while working with leads and management to find a solution. 3. Perform intake assessments and care planning in an organized and timely manner.
Goals #2: Personal Goal: Continue with communication and documentation skills.	Action plan for 2019-2020: With the support from SW lead and SW manager, Crystal will continue improving in her skills of communication and work quality. This includes, having notes/reports ready and organized before meetings, and present in a clear volume/ tone.
Goals #3: Professional Goal: Clinical Development	Action plan for 2019-2020: Work with SW lead and manager in palliative care training.
Goals #4: Professional Goal: LCSW Licensure.	Action plan for 2019-2020: Continue in collecting hours towards LCSW licensure.

Section 6: Employee Comments

Signatures

Employee Signature: 	Date: 4/29/19
Evaluator Signature: 	Date: 4/29/19
Director Signature: 	Date: 4/29/19

FOR HUMAN RESOURCES ONLY

STAFF PERFORMANCE EVALUATION FORM

Employee Name: Crystal Chow	Eval Type: <input type="checkbox"/> End Intro <input checked="" type="checkbox"/> 1 st Annual <input checked="" type="checkbox"/> Focal
Employee Number: 3911	Eval Period: To : 4/1/2017 to 3/31/2018
Title: Social Worker	Evaluator: Evangeline Mijares, PT Program Manager

Rating scale for Goals and Objectives: Met (MT), Partially Met (PM); Not Met (NM)

Section 1: Goals and Objectives For Current Review Period

Goals and Objectives	MT/PM/NM	Major Accomplishments Against The Goals
Objective #1: Crystal will improve documentation skills in PaceLink on a precise and timely manner.	MT	This objective was met.
Objective #2: Crystal will improve compliance with care plans by developing a grid and keeps track of care plan frequencies.	MT	Action Plan for 2017 to 2018: Crystal had created a grid to keep track of the prt's care plan. With the grid, the prts has been stable and was seen every quarterly and as needed. For the active prts, Crystal has created a system to keep track of care plan frequencies on her calendar and is no longer requiring to use a grid. ACTION PLAN REVIEW: Met.
Objective #3: Crystal will improve communication skills with team via email and during IDT.	MT	Action Plan for 2017 to 2018: Crystal has improved with her communication skills with Jade IDT via email and during team meetings. ACTION PLAN REVIEW: Met.
Objective #4: Center Operations: Crystal will help contribute to the growth of Jade team in terms of increasing the current census in the next fiscal year.	PM	Action Plan for 2017 to 2018: Crystal will help Jade team to reach the target maximum census of 170 participants by the next evaluation period. ACTION PLAN REVIEW: Partially Met. New intake enrollment has been on-hold since middle of December until March 31 st 2018 due to shortage of MDs. As of 4/12/18, current Jade census is 158. Jade team has resume taking new intakes as of April 2018.

Rating scale for Key Job Responsibilities and Performance Factors:

- **Extremely Effective (EE):** Highly skilled in the area – has a thorough understanding and is very proficient; displays a high quality of work; exceeds expectations; sets an example to the other employees – is a role model.
- **Fully Effective (FE):** Skilled in the area; meets expectations; performance is consistent in the area being assessed.
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Section 2: Key Job Responsibilities		
Evaluation of key responsibilities as outlined for major job groups or Managers.		
Key Job Responsibility	EE/FE/ME/NE	Manager Comments
1. Clinical Practices <ul style="list-style-type: none"> • Establishes and maintains therapeutic relationship with Participants and their family/support system • Administers Psychosocial evaluations and provides treatment • Upholds Ethical and Legal responsibilities 	FE	Crystal is a competent social worker when conducting all types of assessments. Crystal has a clear understanding of how to provide support when working with Jade prts and their families.
2. Case Management <ul style="list-style-type: none"> • Identifies ways to enhance quality of life • Coordinates services and resources • Demonstrates Advocacy and acts as liaison • Provides financial management 	FE	Crystal provides effective case management when dealing with prt's needs. She is a great advocate and provided several resources to prts and their families when addressing their needs.
3. Documentation <ul style="list-style-type: none"> • Timely • Complete • Accurate • Measurable 	FE	Crystal has improved with her documentation skills in PaceLink. She works closely with Social Worker Lead to review cases and implement corrective action plans as needed during utilization reviews.
4. Team Work <ul style="list-style-type: none"> • Actively participates in team discussions • Negotiates, compromises and supports team plan 	FE	Crystal is an active team player. She participates with team discussions and provides her input as appropriate. She acknowledges team's input and provide updates to prts as recommended by IDT.
Section 3: Performance Factors		
The following performance factors are based on the organization's goals and objectives:		
Performance Factors	EE/FE/ME/NE	Manager Comments
ATTENDANCE – Adheres to departmental expectations concerning attendance, time off requests, and punctuality.	FE	Crystal adheres to the departmental expectations of attendance, time-off requests, and punctuality. However, Crystal has been submitting time exception sheet due to missing punches and Ultipro errors.
TEAMWORK – Open to changes & new ideas; accepts constructive criticism; cooperates with supervisor; treats team members with respect; works cooperatively with others.	FE	Crystal is a good team player. She works closely with other Jade Social Workers to share community resources and provides suggestion as appropriate. She provides timely updates and follow-up prt's issues that are assigned and discussed in her panel as requested by the team.
COMMUNICATION – Communicates information effectively; communicates in an appropriate manner, volume & tone	FE	Crystal is actively participating during Jade IDT meetings and provides pertinent information for prt's that needed follow-up as discussed by the team. Crystal has improved her communication skills with Jade IDT during this evaluation period.
JUDGMENT - Assesses situations & follows through appropriately; uses sound reasoning for decisions/problems solving; appropriately handles confidential information.	FE	Crystal uses sound judgment when handling confidential information. She knows to seek guidance from Social Worker Lead and the Program Manager when dealing with complicated cases.
WORK QUALITY – Demonstrates required knowledge & skills; produces accurate work; makes proper use of work time; timely completion of work; produces quality results.	FE	Crystal has good work ethics. She completes her re-assessment on time for Intake and Assessment meetings.

CUSTOMER FOCUS – Meets the needs of the internal and external customers; establishes and maintains effective relationships with customers and gains their trust and respect.	FE	Crystal has developed a bounding and long term relationships with Jade prts and their families. She is very passionate and is a great advocate to provide a high quality of care to the Jade prts that she served.
INITIATIVE – Offers helpful information and suggestions; accepts new responsibilities; works independently appropriately.	FE	Crystal works closely with Social Worker Lead and is always willing to provide coverage and support to other Jade SWs as needed. Crystal is always willing to assist prts if they need escort for appointments.
SAFETY – Adheres to all On Lok safety policies and procedures, and reports safety concerns appropriately.	FE	Crystal adheres to On Lok safety policy.

Section 4: Overall Evaluation Rating

This section is provided to summarize the overall performance during this period.

Extremely Effective

Fully Effective

Moderately Effective

Not Effective

SUMMARY & COMMENTS:

Review Cycle: 4/2017 to 3/2018

Passed LCSW Law and Ethics Exam: 3/31/2018

Program Manager Comments:

Crystal is a good social worker and works well with the SW team and Jade IDT. She puts all her efforts in helping prts especially those who have limited or no family support. She is often seen escorting prts to appointments and housing to help them through the whole process which prt otherwise would not have been able to accomplish on their own.

Crystal works closely as much as possible with other Jade SWs to provide coverage and support as needed. She attended conferences and share information during Social Worker meetings. Crystal has improved with her communication skills with the team during team meetings. Her updates has improved and become more concise and clear via email.

Crystal has a passion for the work she does with Jade participants and their families to provide a high quality of care. She is also focused on participant's needs and knows how to advocate for them to the team.

Thank you for your valuable contribution to Jade Social Worker department. Team appreciates all your efforts and time when working to Jade prts that has limited or no family support!

SMART Goals: A SMART goal answers these questions:

- **Specific** - What is specifically expected to achieve?
- **Measurable** - What standard will be used to measure success?
- **Attainable** - Does the employee have the necessary resources and skills?
- **Relevant** - How does this relate to the organization/department goals, and the employee's role?
- **Time-Limited** - What is the deadline?

Section 5: Goal Setting for Next Cycle

This section is to clarify and agree to performance, development and career goals for the next performance cycle.

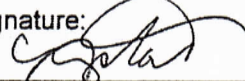
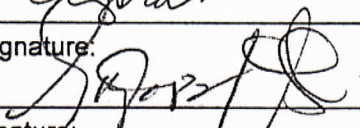
Goals for Next Cycle	Action Plans
Goals #1: Department Goal: To maximize role in assisting with growing the center's census to its target census and beyond if intake pipeline is strong and the center has capacity.	Action Plan for 2018-2019: 1. Keeping a mindset that census growth is a priority and everyone's responsibility. 2. Be available for new intake assessments and care planning activities. 3. Identify obstacles and/or concerns related to census growth and participate in developing solutions (short-term and long-term as appropriate).
Goals #2: Personal Goal: Crystal will earn her hours for LCSW and will study for the exam.	Action Plan for 2018-2019: Crystal would like to earn all of her LCSW hours by end of 2018 and finish her LCSW exams by 2019. <i>her</i>

<p>Goals #3: Center Goal: Crystal will help contribute to the growth of Jade team in terms of increasing the current census.</p>	<p>Action Plan for 2018 to 2019: Crystal will help Jade team to reach the target maximum census of 170 participants by the next evaluation period. Crystal will prioritize new intake assessments on a daily basis.</p>
<p>Goals #4: Center Goal: Crystal, along with the other members of the social worker department will ensure that Gee Center is audit-ready for the PACE audit in June.</p>	<p>Action Plan for 2018 to 2019:</p> <ol style="list-style-type: none"> 1. Ensure that all policies and procedures are up-to-date and relevant. 2. Ensure that all documentation, care plans, and evaluations are complete and will coincide with what is documented in progress notes/evaluations.

Section 6: Employee Comments

Employee submitted Self Eval to Program Manager and DIR Support Services
On File by Program Manager and DIR Support Services

Signatures

Employee Signature: 	Date: 5/15/18
Evaluator Signature: 	Date: 5/15/18
Director Signature:	Date:

FOR HUMAN RESOURCES ONLY



STAFF PERFORMANCE EVALUATION FORM

Employee Name: Crystal Chow	Eval Type: <input type="checkbox"/> End Intro <input checked="" type="checkbox"/> 1 st Annual <input type="checkbox"/> Focal
Employee Number: 3911	Eval Period: To 8/29/16 to 8/29/2017
Title: Social Worker	Evaluators: Evangeline Mijares, Jade Program Manager and Annie Tien, Jade Social Worker Lead

Rating scale for Goals and Objectives: Met (MT), Partially Met (PM), Not Met (NM)

Section 1: Goals and Objectives For Current Review Period

Goals and Objectives	MT/PM/NM	Major Accomplishments Against The Goals
Objective #1: 1. Crystal will improve documentation skills in PaceLink on a precise and timely manner.	PM	Goal is in-progress.
Objective #2: Crystal will improve compliance with care plans by developing a grid and keeps track of care plan frequencies.	PM	Goal is in-progress
Objective #3: Crystal will improve communication skills with team via email and during IDT.	PM	Goal is in-progress
Objective #4: Center Operations: Crystal will help contribute to the growth of Jade team in terms of increasing the current census in the next fiscal year.	PM	Goal is in-progress. Jade current census is 165 as of 8/17/2017.

Rating scale for Key Job Responsibilities and Performance Factors:

- Extremely Effective (EE):** Highly skilled in the area – has a thorough understanding and is very proficient; displays a high quality of work; exceeds expectations; sets an example to the other employees – is a role model.
- Fully Effective (FE):** Skilled in the area; meets expectations; performance is consistent in the area being assessed.
- Moderately Effective (ME):** Has some of the necessary skills; is able to meet some of the critical expectations but not all; needs frequent assistance or instruction to accomplish tasks.
- Not Effective (NE):** Lacks necessary skills to perform the task; unable to meet expectations satisfactorily.

Section 2: Key Job Responsibilities

Evaluation of key responsibilities as outlined for major job groups or Managers.

Key Job Responsibility	EE/FE/ME/NE	Manager Comments
1. Clinical Practices <ul style="list-style-type: none"> Establishes and maintains therapeutic relationship with Participants and their family/support system Administers Psychosocial evaluations and provides treatment Upholds Ethical and Legal responsibilities 	FE	Crystal is proficient in conducting all types of evaluation. She is able to demonstrate correct use of assessment tools to support evidence-based practices. Crystal maintains close and professional relationship with prt and their families.

<p>2. Case Management</p> <ul style="list-style-type: none"> Identifies ways to enhance quality of life Coordinates services and resources Demonstrates Advocacy and acts as liaison Provides financial management 	<p>FE</p>	<p>Crystal demonstrates effective case management. She is knowledgeable about discharge planning and dis-enrollments.</p>
<p>3. Documentation</p> <ul style="list-style-type: none"> Timely Complete Accurate Measurable 	<p>FE</p>	<p>Crystal has showed significant improvement in navigation of PaceLink. Care plans are appropriate, detailed, and with measurable goals. She continues to work closely with Jade SW lead to receive guidance and support to improve documentation skills and compliance with care plan in PaceLink.</p>
<p>4. Team Work</p> <ul style="list-style-type: none"> Actively participates in team discussions Negotiates, compromises and supports team plan 	<p>FE</p>	<p>Crystal is an active member of IDT. She works with team in achieving appropriate care plans and participates during team meetings concerning her panel.</p>

Section 3: Performance Factors

The following performance factors are based on the organization's goals and objectives.

Performance Factors	EE/FE/ME/NE	Manager Comments
<p>ATTENDANCE – Adheres to departmental expectations concerning attendance, time off requests, and punctuality.</p>	<p>FE</p>	<p>Crystal adheres to On Lok attendance policy. However, Crystal has been submitting time exception sheets because sometimes she forgets to clock-in and out on time. Per SW lead, staff is already using a timer to remind herself. PM would like staff to write down the missed punches on the day that she missed clocking in to capture accurate time exception sheets upon submission.</p>
<p>TEAMWORK – Open to changes & new ideas; accepts constructive criticism; cooperates with supervisor; treats team members with respect; works cooperatively with others.</p>	<p>FE</p>	<p>Crystal continues to adjust with team dynamics. She usually seek support from SW Lead and PM if there are any issues or conflicts that may arise among other team members as she slowly adjusting to the team dynamics. PM have instructed Crystal to talk to specific staff that she have issues with as soon as possible to resolve the issues to make the other team member aware of the current situation. Staff has agreed with above recommendation.</p>
<p>COMMUNICATION – Communicates information effectively; communicates in an appropriate manner, volume & tone</p>	<p>FE</p>	<p>Crystal is an active member of IDT discussions to contribute to care planning for the prts. She continues to work with improving her communication skills during team meetings via email and IDT meetings.</p>
<p>JUDGMENT - Assesses situations & follows through appropriately; uses sound reasoning for decisions/problems solving; appropriately handles confidential information.</p>	<p>FE</p>	<p>Crystal is able to identify risk factors and related psychosocial problems. Crystal has good judgment when following-up cases in her panel. She continues to receive guidance from SW lead on how she can better manage her panel. She understands APS reports guidelines and when completing reports.</p>
<p>WORK QUALITY – Demonstrates required knowledge & skills; produces accurate work; makes proper use of work time; timely completion of work; produces quality results.</p>	<p>FE</p>	<p>Crystal is professional and effective social worker. She completes her documentation on time.</p>

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CUSTOMER FOCUS – Meets the needs of the internal and external customers; establishes and maintains effective relationships with customers and gains their trust and respect.	EE	Crystal coordinates, facilitates, and attends meetings to provide support to prt and their families.
INITIATIVE – Offers helpful information and suggestions; accepts new responsibilities; works independently appropriately.	EE	Crystal understands the entire enrollment process. She is effective with dis-enrollments and discharge planning. She has excellent knowledge of EOL issues and advance care planning. Crystal is always open to assist with writing the meeting minutes during morning meetings.
SAFETY – Adheres to all On Lok safety policies and procedures, and reports safety concerns appropriately.	FE	Crystal adheres to On Lok safety policy.

Section 4: Overall Evaluation Rating
This section is provided to summarize the overall performance during this period.

Extremely Effective
 Fully Effective
 Moderately Effective
 Not Effective

Comments:
 Crystal have reached 1 year of employment at On Lok as one of the valuable member of Jade team. She is professional and effective Jade social worker. She has showed significant improvement when navigating PaceLink. She continues to show improvements with her communication skills during team discussion among team members. She continues to establish care plans that are appropriate and detailed with measurable goals.
Thank you for being open to continue to grow and learn as you are work closely with Jade SW Lead and IDT. It has been a pleasure to work with Crystal. Thank you for your ongoing support for the prt and their families !!!

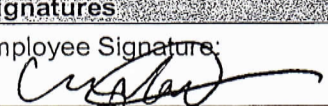
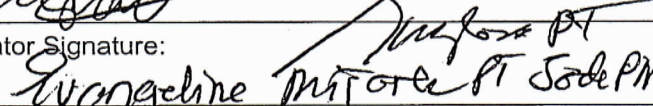
- SMART Goals:** A SMART goal answers these questions:
- **Specific** – What is specifically expected to achieve?
 - **Measurable** – What standard will be used to measure success?
 - **Attainable** – Does the employee have the necessary resources and skills?
 - **Relevant** – How does this relate to the organization/department goals, and the employee's role?
 - **Time-Limited** – What is the deadline?

Section 5: Goal Setting for Next Cycle
This section is to clarify and agree to performance, development and career goals for the next performance cycle.

Goals for Next Cycle	Action Plans
Goals #1: 1. Crystal will continue to improve documentation skills in PaceLink on a precise and timely manner.	Action Plan for 2017 to 2018: Crystal will continue to properly document within SW module following assessments. She will continue to work closely with Jade SW lead and PM if issues or conflicts arise. Crystal will continue to navigate effectively within PaceLink to find information entered by other disciplines.
Goals #2: Crystal will continue to improve compliance with care plans by developing a grid and keeps track of care plan frequencies.	Action Plan for 2017 to 2018: Crystal will continue to ensure that all policies and procedures are up to date and that are all evaluations and progress notes comply with PaceLink standards of care when PM sends the monthly care plan audit report to the team. Crystal will continue to use current reminder system to ensure that the care plan has been met.

<p>Goals #3: Crystal will continue to improve communication skills with team via email and during IDT.</p>	<p>Action Plan for 2017 to 2018: Crystal will brainstorm and filter the updates that she will inform the IDT during team meetings. Continue to encourage and remind Crystal to speak louder when providing clear and concise updates to the team during IDT discussion pertaining to prt's care plan to foster good communication with the IDT.</p>
<p>Goals #4: Center Operations: Crystal will continue to help contribute to the growth of Jade team in terms of increasing the current census in the next fiscal year.</p>	<p>Action Plan for 2017 to 2018: Crystal will continue to help Jade team to reach the target maximum census of 170 participants by the next fiscal year.</p>

Section 6: Employee Comments

Signatures	
Employee Signature: 	Date: 8/17/17
Evaluator Signature: 	Date: 8/17/17
Director Signature:	Date:

FOR HUMAN RESOURCES ONLY
 / - 2.5
 New rate: \$39,400, 82,097.60
 eff date: 08/23/17

STAFF PERFORMANCE EVALUATION FORM

Employee Name: Crystal Chow	Eval Type: <input checked="" type="checkbox"/> End Intro <input type="checkbox"/> 1 st Annual <input type="checkbox"/> Focal
Employee Number: 3911	Eval Period: To 8/29/16 to 3/1/2017
Title: Social Worker	Evaluators: Evangeline Mijares, Gee Program Manager and Annie Tien, Jade Social Worker Lead

Rating scale for Goals and Objectives: Met (MT), Partially Met (PM); Not Met (NM)

Section 1: Goals and Objectives For Current Review Period

Goals and Objectives	MT/PM/NM	Major Accomplishments Against The Goals
Objective #1: NA		
Objective #2: NA		
Objective #3: NA		
Objective #4: NA		

Rating scale for Key Job Responsibilities and Performance Factors:

- **Extremely Effective (EE):** Highly skilled in the area – has a thorough understanding and is very proficient; displays a high quality of work; exceeds expectations; sets an example to the other employees – is a role model.
- **Fully Effective (FE):** Skilled in the area; meets expectations; performance is consistent in the area being assessed.
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- **Not Effective (NE):** Lacks necessary skills to perform the task; unable to meet expectations satisfactorily.

Section 2: Key Job Responsibilities

Evaluation of key responsibilities as outlined for major job groups or Managers.

Key Job Responsibility	EE/FE/ME/NE	Manager Comments
1. Clinical Practices <ul style="list-style-type: none"> • Establishes and maintains therapeutic relationship with Participants and their family/support system • Administers Psychosocial evaluations and provides treatment • Upholds Ethical and Legal responsibilities 	FE	Crystal has successfully completed her 6 months introductory period as Jade SW. She has provided adequate support to families dealing with lack of family support, housing issues, placement, and change with medical status.
2. Case Management <ul style="list-style-type: none"> • Identifies ways to enhance quality of life • Coordinates services and resources • Demonstrates Advocacy and acts as liaison • Provides financial management 	FE	Crystal is very professional and has good background knowledge with geriatric population based on her previous experience.
3. Documentation <ul style="list-style-type: none"> • Timely • Complete • Accurate • Measurable 	FE	In the beginning, Crystal has slight difficulty with navigating PaceLink. SW lead did a re-test on 10/24/16 and she demonstrated basic understanding in the use of PaceLink.

<p>4. Team Work</p> <ul style="list-style-type: none"> Actively participates in team discussions Negotiates, compromises and supports team plan 	FE	Crystal is a good team player. She actively participates with team discussion concerning her panel.
<p>Section 3: Performance Factors The following performance factors are based on the organization's goals and objectives:</p>		
Performance Factors	EE/FE/ME/NE	Manager Comments
<p>ATTENDANCE – Adheres to departmental expectations concerning attendance, time off requests, and punctuality.</p>	FE	Crystal adheres to On Lok attendance policy.
<p>TEAMWORK – Open to changes & new ideas; accepts constructive criticism; cooperates with supervisor; treats team members with respect; works cooperatively with others.</p>	FE	Crystal has slowly adjusted to the team dynamics. She works closely with the Jade SW lead to receive guidance and support on how to better manage her case panel.
<p>COMMUNICATION – Communicates information effectively; communicates in an appropriate manner, volume & tone</p>	ME	At first, PM and SW lead has recommended for Crystal to speak louder and sit closer to the facilitator when she provides updates to the team. Crystal has continues to learn how to communicate appropriately to the team when follow-up are needed for her panel. Recommend to be clear when providing updates to the prts and during IDT discussion pertaining to prt's care plan. Crystal needs to stream-line the process when providing updates to the team to make sure it is concise and clear to minimize confusion.
<p>JUDGMENT - Assesses situations & follows through appropriately; uses sound reasoning for decisions/problems solving; appropriately handles confidential information.</p>	FE	Crystal practice sound judgment when following cases and providing care to the prt that she serves.
<p>WORK QUALITY – Demonstrates required knowledge & skills; produces accurate work; makes proper use of work time; timely completion of work; produces quality results.</p>	FE	Crystal provides good quality of work and completes her assessments on a timely manner. Sometimes, she still encounter some issues and mistakes when navigating PaceLink but overall improved.
<p>CUSTOMER FOCUS – Meets the needs of the internal and external customers; establishes and maintains effective relationships with customers and gains their trust and respect.</p>	FE	Jade prts has expressed high appreciation when Crystal was able to speak their own language. She always put prt first when she provides care to the prts that she serves.
<p>INITIATIVE – Offers helpful information and suggestions; accepts new responsibilities; works independently appropriately.</p>	FE	Crystal has shown initiative to learn PaceLink. She offers helpful information to the team for the prt that team needs follow-up.

SAFETY – Adheres to all On Lok safety policies and procedures, and reports safety concerns appropriately.	FE	Crystal adheres to On Lok safety policy.
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Section 4: Overall Evaluation Rating

This section is provided to summarize the overall performance during this period.

<input type="checkbox"/> Extremely Effective	<input checked="" type="checkbox"/> Fully Effective	<input type="checkbox"/> Moderately Effective	<input type="checkbox"/> Not Effective
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Comments:

Crystal has been a great addition to Jade team. She has successfully pass her 6 month introductory period. She is very willing to learn PaceLink in order to advance her knowledge with documentation. She is very professional and has good background knowledge with geriatric population when working with her panel. She is very dedicated and compassionate when working with seniors. Jade prts has expressed high appreciation when Crystal was able to speak their own language. She always put prt first when she provides care to the prts that she serves.

It has been a pleasure to have Crystal as part of Jade Team !!! Thank you for your hard work and commitment.

SMART Goals: A SMART goal answers these questions:

- **Specific** - What is specifically expected to achieve?
- **Measurable** - What standard will be used to measure success?
- **Attainable** – Does the employee have the necessary resources and skills?
- **Relevant** - How does this relate to the organization/department goals, and the employee's role?
- **Time-Limited** - What is the deadline?

Section 5: Goal Setting for Next Cycle

This section is to clarify and agree to performance, development and career goals for the next performance cycle.

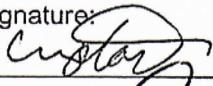
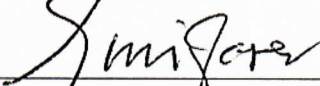
Goals for Next Cycle	Action Plans
Goals #1: 1. Crystal will improve documentation skills in PaceLink on a precise and timely manner.	Action Plan for 2017 to 2018: Crystal will properly document within SW module following training as needed by SW leads. She will work closely with Jade SW lead if issues arise. Crystal will navigate effectively within PaceLink to find information entered by other disciplines.
Goals #2: Crystal will improve compliance with care plans by developing a grid and keeps track of care plan frequencies.	Action Plan for 2017 to 2018: Crystal will ensure that all policies and procedures are up to date and that are all evaluations and progress notes comply with Pacelink standards of care when PM sends the monthly care plan audit report. Crystal will develop a reminder system to assure that the care plan has been met.
Goals #3: Crystal will improve communication skills with team via email and during IDT.	Action Plan for 2017 to 2018: Crystal will speak louder and will sit closer to the facilitator when she provides updates to the team. Recommend to be clear and

	concise when providing updates during IDT discussion pertaining to prt's care plan to minimize confusion.
<p>Goals #4: Center Operations: Crystal will help contribute to the growth of Jade team in terms of increasing the current census in the next fiscal year.</p>	<p>Action Plan for 2017 to 2018: Crystal will help Jade team to reach the target maximum census of 170 participants by the next fiscal year.</p>

Section 6: Employee Comments

I am very happy to work for On Lok. to be part of the IDT Team. We have a good team. I enjoy working with participants + families. I want to thank our Team for having me to be part of it.

Signatures

Employee Signature: 	Date: 2/22/12
Evaluator Signature: 	Date: 2/22/17
Director Signature:	Date:

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