



Policy Title: **Personnel: Employee Annual Assessment**

Policy #: **06-001-0030**

Effective Date: 04/2/2024

Approved by: Telly Delor, Chief Operating Officer

Functional Area: Human Resources

Responsible Leader: Stephanie Shank, Director of Human Resources

Policy Owner: Jody Kruskie, Labor/Employee Relations Manager

Applies to: SCCCMH Staff

Purpose: To align SCCCMH policies to the Commission on Accreditation of Rehabilitation Facilities (CARF) Human Resources – Section 1.I.6.b.

I. Policy Statement

It is the policy of St. Clair County Community Mental Health (SCCCMH) to ensure interactive, timely, effective, and meaningful employee performance reviews are completed.

II. Standards

- A.** Annual assessments shall be completed in coordination with all employees, including all contract employees.
- B.** Annual assessments will be completed in accordance with the following minimum guidelines, as appropriate:
 - 1. Annual performance reviews are required yearly on employee's annual anniversary date.
 - 2. Probationary employees shall be provided with performance review, documented through the ADP Performance Dashboard 90 Day Evaluation form on or about ninety (90) days of employment. Further documentation on an Employee Communication Memorandum will be done if needed prior to the completion of the probationary period. At the completion of one hundred eighty (180) calendar days of employment, the Authority will send the employee a notification through ADP Performance Dashboard of satisfactory completion of the probationary period or with a notice of release from employment. An extension of the probationary period is at the sole discretion of the Authority.

3. Transfer performance reviews are required prior to the date an employee is scheduled to transfer out of a program.
4. A Local 3385 and/or Chapter 20 employee who requests a transfer within their same classification to another location, program, or division must successfully complete a ninety (90) day trial period.
5. A trial period for all bargaining unit employees who are promoted or awarded new positions into a different classification shall be provided as follows:
 - a. sixty (60) calendar days for para-professional and clerical classifications
 - b. one hundred twenty (120) calendar days for professional classifications

At the beginning of the trial period, written performance review criteria will be presented to the employee. Midway through the trial period, the employee and their supervisor will meet to review the employee's performance. Should there be any deficit areas identified, the employee will receive a written plan for improvement, as appropriate. The trial period can be extended with mutual agreement among the Authority, the employee, and the Union. An extension shall not be subject to the grievance procedure.

- C. Supervisory staff may use form [#0702 Employee Communication Memorandum](#) that is available in the forms index within ADP to document intermittent contacts, accolades, improvement opportunities, progress on a performance review employee action plan and/or progress on a corrective action plan, and (See [Administrative Policy #06-001-0020, Personnel: Supervision of CMH Staff](#)).
- D. Functional Job Task Lists (FJTL) are required upon initial employment (see [Administrative Policy #06-001-0080, Personnel – Job Descriptions – Function Job Task Lists \(FJTL\)](#)). FJTL should be updated on an ongoing basis to best reflect current employer expectations and included in the personnel file. At minimum, the FJTL must be updated annually and must be included with the annual assessment.
- E. Direct supervisory staff are responsible for initiating and ensuring the performance review is completed in a timely manner.
- F. All staff shall be given the opportunity to provide feedback about their supervisor at the time of supervisor's evaluation.
- G. Performance Reviews are due annually at the time of the employee's anniversary date, however in the case of probationary and/or trial periods; employees may be evaluated prior to the evaluation date(s).
- H. Employees interested in promotion opportunities should indicate their interest at the time of their performance review and forward a memorandum to appropriate Authority staff. Note that neither of these is required to be considered for promotion.

- I. Supervisors should discuss with employee's who are interested in career planning, the promotion guidelines or specific training required for the position for which the employee is interested.
- J. Job Descriptions are to be reviewed annually at the time of the employee evaluation for accuracy and content, and any recommended changes should be noted by the supervisor and uploaded in ADP to be included with the annual review.

III. Procedures, Definitions, and Other Resources

A. Procedures

Responsibilities

Position	Responsibilities
Human Resource Designee	Release annual assessment to supervisors and employees.
Employee	Complete annual assessment in ADP and uploads FJTL.
Supervisor	Complete annual assessment in ADP.
Supervisor	Meet with employee to review assessment.

Actions – Preparation

Action Number	Responsible Stakeholder	
1.0	Human Resource Designee	<ol style="list-style-type: none"> 1. Notify supervisors of the upcoming annual assessment. 2. Release the annual assessment to supervisors & employees.
2.0	Employee	<ol style="list-style-type: none"> 3. Complete the annual assessment using the ADP Annual Assessment form. 4. Sends to HRDepartment@scccmh.org an updated Functional Job Task List (FJTL) into ADP.
3.0	Supervisor	<ol style="list-style-type: none"> 5. Ensure an updated Functional Job Task List (FJTL) is completed if necessary. 6. Complete a performance review using the ADP Annual Assessment form.

Actions – Probationary/Transferred/Promoted Performance Reviews

Action Number	Responsible Stakeholder	Details
1.0	Supervisor	<ol style="list-style-type: none"> 1. Schedule a mutually convenient date and time for performance review. 2. Review the Employee Training Worksheet and the Employee Orientation Worksheet for completion. See

Action Number	Responsible Stakeholder	Details
		Administrative Policy #06-002-0006, Personnel: Employee, Student, and Volunteer Orientation & Training. 3. Review the Functional Job Task List. 4. Complete a 90-day review for transferred or promoted employees, and reviews with the employee. 5. Complete employee performance notes and Remediation Plan if a Remediation Plan is required.
2.0	Supervisor/Employee	6. Complete sign-off area, and, if applicable, Remediation Plan Development sign-off area. 7. Consult with own supervisor about retaining or releasing the employee.
3.0	Supervisor	8. Provide the employee, prior to the day of the completion of probationary period or trial period (see Standards B. 2, 3 and 5), with form #0734 Sample Letter of Completion of Probationary Period or with form #0706 Employee Termination Sample Letter of Release During Probation or Temporary Employment . Refer to Standard B.5 and Union Contracts if trial period unsuccessful. 9. Forward a copy of Transfer FJTL and performance review to the new Supervisor.

Actions – Annual Performance Review

Action Number	Responsible Stakeholder	Details
1.0	Supervisor	1. Schedule a mutually convenient date and time for the annual assessment to be reviewed.
2.0	Supervisor/Employee	2. Review the evaluation and competencies and employee performance notes, encouraging mutual dialogue and open mindedness; adds comments where appropriate.
3.0	Supervisor	3. Release the annual assessment to the employee.
4.0	Employee	4. Acknowledge the annual assessment in ADP.
5.0	Supervisor's Supervisor	5. Review any submitted Supervisor Feedback Forms (form #0729 Supervisor Feedback available in the forms index), if applicable.

B. Related Policies

[Administrative Policy #06-001-0020, Personnel: Supervision of CMH Staff](#)

[Administrative Policy #06-001-0080, Personnel – Job Descriptions – Function Job Task Lists \(FJTL\)](#)

[Administrative Policy #06-002-0006, Personnel: Employee, Student, and Volunteer Orientation & Training.](#)

C. Definitions

N/A

D. Forms

[#0702 Employee Communication Memorandum](#)

[#0729 Supervisor Feedback](#)

[#0734 Sample Letter of Completion of Probationary Period](#)

E. Other Resources (i.e., training, secondary contact information, exhibits, etc.)

N/A

F. References

N/A

IV. History

- Initial Approval Date: 04/1988
- Last Revision Date: 02/2025 BY: Jody Kruskie
- Last Reviewed Date:
- Non-Substantive Revisions:
- Key Words: Annual Assessment, Evaluation