Performance Review
Practice Manager

This template is designed to be used together with the Practice Manager Position Description template, which outlines the responsibilities and requirements of the role.

Information for the reviewer

Before the performance review, ask the employee to complete the different sections in this document and return it to you at least two days before the review.

During the review, use this document to record:
- how the employee thinks they have performed against each of their key responsibilities
- feedback or concerns from the employee
- the employee's career goals for the future
- the goals that you and the employee agree on for the next performance cycle and the support that you will provide to help the employee achieve their goals (e.g. training).

Information for the employee

Before your performance review, complete the different sections in this document and return it to the reviewer at least two days before your review.

During your review, you will be able to:
- reflect on your work during the performance cycle
- receive appreciation and recognition for your achievements
- raise problems and resolve issues arising from your work
- discuss your hopes and expectations for the next performance cycle
- set your career goals for the future
- discuss training and development opportunities to improve your performance and further your career.

Practice name: **Date:**

Practice Manager performance review

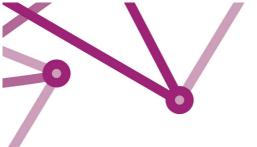|	
Employee name:	
Position responsible to:	
Positions with direct responsibility to this position:	
Date of this review:	
Reviewer name:	

Measuring performance against your position description

Practice Manager position description	Employee rating (out of 10)	Reviewer rating (out of 10)	Comments
Key responsibilities – financial			
The Practice Manager will:			
• coordinate payroll services including superannuation payments, Australian Taxation Office employer responsibilities and maintain records of leave entitlements			
• maintain accurate financial records and provide regular reports to the practice owner/s			
• coordinate accounts receivable and payable and maintain debt prevention activities			
• expand the practice to make it more profitable and meet the needs of the community.			
Key responsibilities – operational			
The Practice Manager will work collaboratively with the practice staff to:			
• develop and maintain a suite of practice policies and procedures			
• develop and maintain a business continuity and disaster recovery plan			
• develop and maintain an asset register			
• ensure consumables and equipment are kept stocked and maintained to the manufacturer's standards and conditions			
• be part of and contribute to a team environment			
• oversee that the practice and rooms are clean, tidy and accessible			
• lead accreditation compliance and implementation including preparation			
• oversee day-to-day practice operations			

• develop relationships with GPs, allied health professionals and other stakeholders			
• keep the team's knowledge of the practice IT systems up to date.			

Key responsibilities – personnel

The Practice Manager will: • coordinate staff employment and rosters, including annual leave cover			
• arrange locum cover for clinical staff when necessary			
• encourage governance and social responsibility			
• encourage employee motivation, professional development and satisfaction			
• coordinate the interviewing and hiring of staff			
• conduct regular staff training, meetings and appraisals.			

Key responsibilities – safety, quality and culture

The Practice Manager will adhere to the practice's policies, procedures and code of conduct by: • leading risk management and quality improvement processes			
• recording incidents and near misses			
• exercising duty of care including meeting practice standards and accountability			
• maintaining patient and practice confidentiality at all times			
• ensuring the practice building and work spaces are conductive to a safe and practical work environment			
• ensuring clinical governance processes are in place			
• contributing to the development of a culture consistent with the values of the practice.			

Documentation review	Yes	No
Evidence of training in CPR undertaken within the past three years or as otherwise required by the RACGP general practice standards		
Evidence of a current criminal record screening		
Evidence of a current Western Australian Driver's Licence		
Evidence of a current Working with Children Check		

Overall performance

Your achievements:
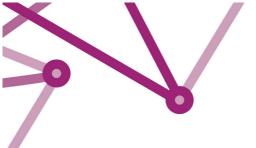What achievements have given you the greatest satisfaction? How could they be built on?

Your challenges:
What challenges have you experienced? How could they be overcome?

Your obstacles:
Were there any obstacles that prevented you from achieving your goals? How could they be eliminated?

Your job description:
Is your job description still current?

Your opportunities for improvement:
To improve your overall performance, what could be done by management, yourself or others?

Your goals:
What are your goals for the next performance cycle?

Your career:

How do you see your career developing?

How would you rate your overall performance?

1_____ 2_____ 3_____ 4_____ 5_____
Not satisfactory   Average   Very satisfactory

Professional learning and development plan

Goal/s	Action required	Date for completion

Additional training needs	Reason	Comments

Skills to be developed (select as preferred)	Attendance	Future attendance
Accreditation		
Clinical software training (medical director/best practice etc.)		
CPR Course		
Customer service training and dealing with difficult patients		
MBS item numbers		
My Health Record		
Pen Clinical Audit Tool		
Recall and reminder systems		
Triage and emergencies		
Other		

Employee's comments

Reviewer's comments

Performance review discussed and accepted

Employee name:	
Signature:	Date:
Reviewer name:	
Signature:	Date:

Whilst all care has been taken in preparing this document, this information is a guide only and subject to change without notice.