

Appendix F: QUARTERLY CHECK IN SHEETS FOR LEVEL 2 AND 3

Level 2 – Quarterly Check in

Non-Licensed Clinical Career Ladder Promotion Checklist

Employee Name: _____

Employee Unit: _____

Hire date: _____

Level 2 Date Started: _____

Quarterly Check in:

Quarter	Date Signed off
January/February/March	
April/May/June	
July/August/September	
October/November/December	

Requirements Checklist

All Non-Licensed Clinical staff complete the following:	Date taken/signed off
Maintained current CPR/1 st aid certification	
Maintained current CPI	
Maintained YMHFA	
Annual competencies	
All assigned HealthStream modules	
All assigned Sanctuary Boosters	
Effective Preceptor for new staff	
Attendance at 2 team meetings per month or documented evidence of reading 100% of Team Meeting Minutes	

Appendix F: Quarterly Check in Sheets for Level 2 and 3

Performance evaluations show no more than one "not meeting standards"	
No written Corrective Counseling for previous 6 months	

Activities Assistant (AA)	Date taken/signed off
Ropes Course Certification Maintained	
Shallow water lifeguard certification	

Mikel Allen Clinical Nurse Educator

Heather Cloward Human Resources Director

Program Director/Supervisor

Program Director/Supervisor

Level 3 – Quarterly Check in

Non-Licensed Clinical Career Ladder Promotion Checklist

Employee Name: _____

Employee Unit: _____

Hire date: _____

Level 3 Date Started: _____

Quarterly Check in:

Quarter	Date Signed off
January/February/March	
April/May/June	
July/August/September	
October/November/December	

Requirements Checklist

All Non-Licensed Clinical staff complete the following:	Date taken/signed off
Maintained current CPR/1 st aid certification	
Maintained current CPI (every 6 months)	
Maintained YMHFA	
Annual competencies	
All assigned HealthStream modules	
All assigned Sanctuary Boosters	
Effective Preceptor for new staff	
Attendance at 2 team meetings per month and documented evidence of reading 100% of Team Meeting Minutes	

Appendix F: Quarterly Check in Sheets for Level 2 and 3

Performance evaluations show no more than one "not meeting standards"	
No written Corrective Counseling for previous 6 months	
Completion of/in one special project or presentation approved by Program Director yearly	
Yearly participation in one volunteer activity in the community for Shodair	
Responsible for welcoming activities for new staff	
Consistently showing that you are living out the Sanctuary values that promote the mission, vision, and values of Shodair.	
Attendance at one Journal Club/one Shodair in-service or one on-line Webinar related to mental health.	

Mental Health Technicians (MHT's)	Date taken/signed off
Annual Preceptor Course Update/Review	
Completion of/in one special project or presentation approved by Program Director yearly.	

Unit Assistants (UAs)	Date taken/signed off
Annual Preceptor Course Update/Review	
Completion of/in one special project or presentation approved by Program Director yearly.	

Appendix F: Quarterly Check in Sheets for Level 2 and 3

Activities Assistant (AA)	Date taken/signed off
Attendance at Allied Therapy Meetings and documented evidence of reading 100% of meeting minutes.	
Maintained Ropes Course Certification Maintained	
Maintained Shallow water lifeguard certification	
Develop 2 new group activities per month	

Mikel Allen Clinical Nurse Educator

Heather Cloward Human Resources Director

Program Director/Supervisor

Program Director/Supervisor