

CBHC Supervision Presentation

Database Overview:

- ✦ **Centralized Location:** SuperD is a database created for multiple users to electronically record supervision records. In addition to all of the supervision records that are created and stored in SuperD, you also have the ability to store any electronic documents created external to the database, including any document that can be scanned and converted to a PDF file (letters, diplomas/licensing documents), by using the employee folder provided on the employee screen. This can be especially convenient when it comes to old employee supervision records. All of your current and historical records will be stored and accessed from one location.
- ✦ **Minimal Training Requirements:** Because SuperD was designed with the user in mind, special detail was paid to make using the database simple and intuitive, while still providing all of the elements to ensure complete supervision records. Very minimal training is required when a supervisor is on-boarding to the database. Typically, a 20 to 30 minute training session is adequate.
- ✦ **Defined Supervision Structure:** Key elements for the organization of supervision include standardized formatting and processes. SuperD standardizes the format and structure of supervision, while still allowing slight modifications to fit individual needs. The database is structured to guide the supervisor through the supervision process, eliminating individually created, ad hoc forms, thereby providing documentation consistency throughout the organization.
- ✦ **Concurrent Documentation:** The ease of the system allows supervisors to document concurrently during supervision sessions with staff. At the end of the session, supervisors have the ability to provide the staff member with a printed or electronic copy of the supervision details.
- ✦ **Easy Tracking:** Since all supervision records are electronic and centrally located, it is easy to track and organize information, including follow up items. Assigned follow up/action items are tracked through the database (including alerts when logging into the system) until they have been officially closed out, ensuring that assigned tasks don't get overlooked.
- ✦ **Reporting:** One of the essential areas of supervision that has long been problematic is the ability to quickly and easily review an employee's supervision history, especially when multiple supervisors are involved. SuperD provides supervisors, managers and HR professionals comprehensive reports that allow for detailed or summary views of an employee's supervision record, even if it spans many years. The user is able to quickly view employee records in clear, concise reporting formats, with the ability to select specific parameters by which to filter the information, allowing supervisors the ability to view only those records pertinent to the specific need. Reports are grouped into supervisor defined reports (reports that apply to all supervisions completed by a supervisor), supervisee defined reports (reports that pull based on a specified employee) and miscellaneous/other reports. A sample of available reports is provided in the picture below. The use of a centralized database provides expansive capabilities to create trending reports.

Reports		
Supervisor Reports:	Staff Reports:	Other Reports:
Supervision Index	Supervision Index	New Hire Reports
Group History-detail	Group History-detail	Over Due Supervision
Follow Ups Due	Individual History-detail	
Time Report	Disciplinary History-detail	
	Time Supervised	
	Follow Ups Due by STAFF	
	History-by Category	

- ✦ **Enhanced Auditing Capabilities:** SuperD is a great management tool for auditing supervision records. This system greatly enhances the ability to maintain higher level management oversight of frontline supervisors, allowing managers to provide time-sensitive feed back for improving the quality and content of a supervisor's records. Areas of deficiency can be quickly identified and addressed before patterns become problematic, greatly improving the supervision process for both the supervisors and their staff.

Four Main Supervision Types:

- General: This type of supervision is for all routine supervision.

The screenshot shows a web-based supervision record form. At the top, there are fields for 'Supervision ID' (1), 'Date' (1/14/2009), and 'Staff' (tamerap). Below these are 'Last Edited' (1/14/2009 2:19:20 PM), 'Supervisor' (Tamera Parkins), 'Minutes Long' (30), and 'Supervision Type' (General). A 'Save' button is on the right. The main section is titled 'General Supervision' and contains a 'Category' dropdown (Training), a 'Topic' text box (Computer), and a 'Last Edited' timestamp (1/21/2009 10:21:08 AM). There are 'View Report' and 'Add New Topic' buttons. The 'Discussion:' field contains text about computer training. The 'Action Items:' field contains a task for Tamera Parkins to complete an Excel course by November 1st. There are also fields for 'Person Responsible' (Tamera Parkins), 'Follow up required?' (checked), 'Date Due' (11/1/2009), and 'Date completed'. A 'Follow up notes:' field is at the bottom.

- **General Supervision Categories:** Several pre-defined categories have been provided for general supervision (i.e., chart review, training, competencies, engagement, goals, etc.). These can be customized to meet the particular needs of the user. By using these categories (available in a drop down), you can easily run a report that looks at a specific category of supervision.
- **Topic:** While the categories dropdown defines broad areas of supervision, the Topic field is provided as a modifier for the category. For example, you can select training as the main category, and then qualify the type of training (electronic record keeping, cultural, individual service planning, computer, etc)
- **Discussion/Documentation:** The Discussion area is an unlimited field, and you are able to type as much information as needed.
- **Follow Up/Actions:** An Action Item field is available to document any deliverables associated with the discussion. You are able to assign the person responsible for the action, as well as enter a date for follow up to be completed (this field auto-populates with a pre-determined date that can be set for a day, week, month or longer interval, depending on the needs of the user, and can be overwritten if the date provided does not meet the need). An automatic email is generated through the Action Item process. The email generated will go to the responsible person, with a cc to the supervisor entering the supervision notes, and the subject line will contain the record ID, for easy reference. A task will be created on the supervisor's MS Outlook task manager, which can then be assigned to the responsible person, if desired. The body of the email will contain all text that was entered into the Action Item field, which you can add to if desired. Once the action item has been completed, enter the date completed and any follow up notes that pertain. You are also able to document in the follow up area if there are updates to an assigned task that has not yet been completed (partial completion status, etc.)
- **Multiple Topics:** Once the details of the first topic have been completed, you can add a new topic page and enter the details for the subsequent topics. Each topic has the ability to have its own follow up.
- **Viewing/Printing:** A copy of the supervision record can be printed and given to staff at the end of a supervision session simply by clicking on the View/Print button. It is also possible to send an electronic copy by email.

Disciplinary: This type of supervision is for formal disciplinary actions only.

- **Disciplinary Types:** Five types of disciplinary actions are available in the disciplinary type dropdown list (this can be adjusted depending on HR structure): suspension with and without pay, verbal, written and termination.
- **Descriptive Fields:** Separate fields are provided for the supervisor to outline the precipitating deficiency, any previous incidents that relate to the action, performance expectations and consequences.
- **HR and Management Approval:** Mechanisms have been built into this form that allow for direct HR and Management interaction. By clicking on the check box for HR or Director approval, an email will generate to those individuals, including the disciplinary report as an attachment, with the record ID and supervisor name in the subject line. Those individuals are then able to go into that record and make appropriate changes to meet legal and policy requirements. Once approval is received from the HR and Manager, the supervisor is approved to review with the staff member.
- **Action Items:** An Action Item area is also provided for disciplinary actions that works the same way as described in the General Supervision area.
- **Staff Response:** Fields are provided in which to document staff response, acknowledgement

- New Hire Documentation:** A separate form is provided for documenting the new hire process. Tracking the progress of new employees is an important aspect for on-boarding staff members. Ensuring that they have completed required training and orientation areas is key to their integration into your organization. The areas tracked can be modified to meet the organizational need, as training and orientation practices differ from company to company.

Supervision ID	3	Date	9/15/2009	Staff	tamerap	Save	
Last Edited	7/31/2009 3:31:41 PM	Supervisor	Tamera Parkins	Minutes Long:	30	Supervision Type	New Hire

New Hire

Last Edited: 7/31/2009 3:31:23 PM

1a Building Orientation <input checked="" type="checkbox"/>	1b Date Completed:	9/16/2009	View New Hire Report
2a Employee Packet <input checked="" type="checkbox"/>	2b Date Completed:	9/25/2009	
3a Competency Overview <input checked="" type="checkbox"/>	3b Date Reviewed:	10/1/2009	
4a New Hire Competencies Completed <input type="checkbox"/>	4b Date Completed:		
5a Employee demonstrates job duties <input type="checkbox"/>	5b Date Completed:		
6a All New Hire information and tracking completed <input type="checkbox"/>	6b Date Completed:		

Action Items:
Tamera must complete all new hire assignments no later than December 1.

Person Responsible: Tamera Parkins **Follow up required?**

Follow up notes:
9/16/09 Tami has completed the building orientation and employee packed and has reviewed competencies

Due Date:	Date Completed:
12/1/2009	

- Employee Evaluations:** Generally, employees receive performance evaluations annually. Additionally, it is standard to conduct interim evaluations on new employees (usually at the 3 and 6 month marks). Interim evaluations are generally a brief evaluation of how an employee is progressing. The below form provides a simple format for completing a quick evaluation, including areas for staff comments, supervisor summary, employee goals and action items.

Interim Evaluation

Last Edited: **Interval**

Position: **Performance Level**

Meet Requirements?

<p>Staff Comments:</p> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<p>Action Items:</p> <input style="width: 100%; height: 20px;" type="text"/>
<p>Supervisor Comments:</p> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<p>Person Responsible <input type="text"/> Follow up required? <input checked="" type="checkbox"/></p> <p>Due Date: <input type="text"/> Date Completed: <input type="text"/></p>
<p>Goals:</p> <input style="width: 100%; height: 20px;" type="text"/>	<p>Follow up Notes:</p> <input style="width: 100%; height: 20px;" type="text"/>

View Evaluation

Employee Reviewed?