Using Multiple Rating Scales within One Assessment

Provided by HealthStream Operations
Summary

Many times organizations want to utilize more than one rating scale in an Assessment. When the preference is to include multiple rating scales in one assessment, it is recommended practice to ensure the top range of each rating scale matches. If the rating scales are not configured properly, this can lead to an overall assessment score that is not as expected. In this document, we will walk through an example of an assessment with multiple rating scales. This will demonstrate how the system calculates the score and the importance of following the recommended practice of ensuring all rating scales within an assessment have the same top range.

Rationale

The Overall Rating level of an assessment is calculated based on the rating scales associated to the assessment template. Depending on the rating scales and the rating levels involved, the calculations may not appear to meet the intended need but the system is likely calculating by design.

Assessment Rating Scale, also known as the ‘Overall Rating Scale’, is the scale that will determine the final Overall Rating level/score for the employee. When the system calculates the scores of each section, it will use this selected rating scale as the ‘base’ to obtain the final rating.

So, for example, if the overall rating scale is a 5-level scale, the system will ensure each scored section is calculated based on 5 levels. When using multiple rating scales in one assessment, recommended practice is to ensure the top range of each rating scale matches.

How To

The range values are entered when creating Rating Scales through the Assessments tab in the HCC and/or HPC. To demonstrate the importance of ensuring the top ranges of rating scales used within the same assessment match, we will use the example below.

The Overall Rating Scale has a top range of 5.00, the top range of all other rating scales in the assessment should be 5.00. This will ensure the calculations and overall ratings/scores meet your intentions.

The assessment in the example, below, has multiple rating scales involved. Notice again the Overall Rating Scale has a top range of 5.00. To get the expected calculations, the rating scales with 2 levels should have a top range of 5.00 instead of 4.00. (See screen shots below)
### Overall Rating Scale for assessment. Top range is 5.00

<table>
<thead>
<tr>
<th>Level Name</th>
<th>Range</th>
<th>Default Value</th>
<th>% Expected to Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsatisfactory</td>
<td>0 - 1.00</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Inconsistent</td>
<td>1.01 - 2.00</td>
<td>2.00</td>
<td>5</td>
</tr>
<tr>
<td>Performing-Meets Expec...</td>
<td>3.01 - 4.00</td>
<td>4.00</td>
<td>75</td>
</tr>
<tr>
<td>Excellent-Exceeding Ex...</td>
<td>4.01 - 5.00</td>
<td>5.00</td>
<td>10</td>
</tr>
<tr>
<td>New to Role - Orientat...</td>
<td>2.01 - 3.00</td>
<td>3.00</td>
<td>5</td>
</tr>
</tbody>
</table>

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### 2 Level rating scale. Top range should be 5.00

<table>
<thead>
<tr>
<th>Level Name</th>
<th>Range</th>
<th>Default Value</th>
<th>% Expected to Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, I have not (Employee ...</td>
<td>0 - 2.50</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>Yes, I have (Employee ...</td>
<td>2.51 - 4.00</td>
<td>4.00</td>
<td>85</td>
</tr>
</tbody>
</table>

Add Rating Level
**Putting It All Together**

Scenario: Tracey Clapton, Manager of Medical ICU, contacts you in regard to the score for Suzy Jones’s assessment. Suzy is a wonderful employee and should be within the Performing – Meeting Expectations level; however, she is appearing as Exceeding Expectations and now her assessment requires an approval. This can be a result of the top ranges in the rating scales, not matching. Let’s walk through the assessment to demonstrate how the system calculates the Overall Rating, and why Suzy is receiving an Exceeding Expectations rating.

**DETAILS:**

**Assessment name:** Leadership Performance Appraisal

There are 10 sections on this assessment. 6 of the sections are rated. There are different rating scales incorporated into these sections.

Assessment Rating Scale (Overall Rating Scale) for the entire assessment is the **Performance Rating Scale (5 Level)** scale. This means the top range of the overall rating scale is 5.00.

Here is a chart of the scored sections and rating scales involved:

<table>
<thead>
<tr>
<th>SECTIONS THAT ARE SCORED</th>
<th>RATING SCALE ASSOCIATED</th>
<th>SECTION SCORING</th>
<th>RATING LEVEL / RANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL RATING SCALE</td>
<td>Performance Rating Scale (5 Level)</td>
<td>Average</td>
<td>5 level / 5.00 (pic above)</td>
</tr>
<tr>
<td>Goals</td>
<td>Goals</td>
<td>Average</td>
<td>2 level / 5.00</td>
</tr>
<tr>
<td>Role Specific Responsibilities</td>
<td>Performance Rating Scale (5 Level)</td>
<td>Average</td>
<td>5 level / 5.00</td>
</tr>
<tr>
<td>Policies</td>
<td>Acknowledgement Scale (2 Level) 2</td>
<td>Average</td>
<td>2 level / 4.00</td>
</tr>
<tr>
<td>Annual Requirements</td>
<td>Annual Requirement Scale (2 Level)</td>
<td>Average</td>
<td>2 level / 4.00</td>
</tr>
<tr>
<td>Summative Performance Rating</td>
<td>Performance Rating Scale (5 Level)</td>
<td>Average</td>
<td>5 level / 5.00</td>
</tr>
<tr>
<td>Qualification for The Institute for Greater Leadership</td>
<td>Yes / No Scale (2 Level)</td>
<td>Average</td>
<td>2 level / 4.00</td>
</tr>
</tbody>
</table>
Using this information, let’s walk through the calculations for employee Suzy Jones.

**1ST SCORED SECTION: GOALS = 3.25**

There are 8 goals in the section.

Ratings were:
- Met = 5.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00
- Partially Met/In Progress = 3.00

Calculations: 5.00 + 3.00 + 3.00 + 3.00 + 3.00 + 3.00 + 3.00 + 3.00 = 26

Average: 26/8 = 3.25

Score = 3.25

**2nd SCORED SECTION: ROLE SPECIFIC = 4.00**

There is 1 statement total in the section.

Rating:
- Performing-Meets Expectations = 4.00

Calculations: 4.00 – no calculations needed as the rating scale in use for this section has a 5.00 top range

Average: one statement in section – no need to average

Score = 4.00
**3rd SCORED SECTION: POLICIES = 5.00**

There is 1 statement total in the section.

Rating:
- Yes, I have (Employee has) read, understand and abided by the policies = 4.00

Calculations: 4.00 + 1.00 **since this section has a rating scale with a top range of 4.00, the system adds 1.00 to make up the difference and match the Overall Rating Scale’s top range of 5.00.

Average: one statement in the section – no need to average

Score = 5.00

**4th SCORED SECTION: ANNUAL REQUIREMENTS = 5.00**

There is 1 statement total in the section.

Rating:
- Yes, I have (Employee has) completed all of the annual requirements = 4.00

Calculations: 4.00 + 1.00 **since this section has a rating scale with a top range of 4.00, the system adds 1.00 to make up the difference and match the Overall Rating Scale’s top range of 5.00.

Average: one statement in the section – no need to average

Score = 5.00

**5TH SCORED SECTION: SUMMATIVE PERFORMANCE RATING = 4.00**

There is 1 statement total in the section.

Rating:
- Performing-Meets Expectations = 4.00

Calculations: 4.00

Average: one statement in the section – no need to average

Score = 4.00
**6th Scored Section:** Qualification for the Institute for Greater Leadership = N/A

There is 1 statement total in the section.

Rating:
- Not Applicable

Calculations: N/A - no rating with a value is selected so this section is not calculated in overall score

Average: no need to average

Score = N/A

If we take all of those section scores:

**1st Scored Section:** Goals = 3.25

**2nd Scored Section:** Role Specific = 4.00

**3rd Scored Section:** Policies = 5.00

**4th Scored Section:** Annual Requirements = 5.00

**5th Scored Section:** Summative Performance Rating = 4.00

**6th Scored Section:** Qualification for the Institute for Greater Leadership = N/A (not included in average calculation)

Calculations: 3.25 + 4.00 + 5.00 + 5.00 + 4.00 = 21.25

Based on the Assessment Scoring – this total should be averaged by the sections that are scored. There are 6 scored sections however only 5 scored sections for this employee will impact the final rating. This is due to the 6th section N/A rating. So, to obtain the average and final rating level, we divide by 5.

Average – 21.25/5 = 4.25
With her Overall score being a 4.25, she falls within the Excellent – Exceeding Expectations level.

<table>
<thead>
<tr>
<th>Level Name</th>
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<th>Default Value</th>
<th>% Expected to Score</th>
<th>Rating Translator</th>
</tr>
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<tbody>
<tr>
<td>Unsatisfactory</td>
<td>0 - 1.00</td>
<td>0</td>
<td>5</td>
<td>Unacceptable</td>
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<td>Inconsistent</td>
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<td>2.00</td>
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<tr>
<td>Performing-Meets Expectations</td>
<td>3.01 - 4.00</td>
<td>4.00</td>
<td>75</td>
<td>Acceptable</td>
</tr>
<tr>
<td>Excellent-Exceeding Exigent</td>
<td>4.01 - 5.00</td>
<td>5.00</td>
<td>10</td>
<td>Exceed</td>
</tr>
<tr>
<td>New to Role – Orientation</td>
<td>2.01 - 3.00</td>
<td>3.00</td>
<td>5</td>
<td>Partially Acceptable</td>
</tr>
</tbody>
</table>

Resources

- HLC Administrator Help > HCC/HPC User Guides > FAQ