

# YOUR COMPANY NAME

HEALTH BENEFIT REP: Process claims & answer incoming calls.

## Performance Evaluation Standards

Listed on the following pages are the areas (factors) of employee performance. Each employee receives periodic evaluation in these areas. Performance is rated between levels 1 (low) and 5 (high). Each factor has a description, an importance value, and brief statements for all 5 levels of performance. The values indicated on the accompanying graph illustrate the importance of each performance factor to the job. The points given in each area are determined by multiplying the level times the job value. For example, (level 5) X (value 7) = (points 35). Since level 5 is the highest, 5 times the value represents the maximum points for the area described by the factor. Some of the factors such as attendance may have an assigned minimum quantity requirement for each level of performance.

**The information in these guidelines help assure that employee performance evaluations are fair and objective.**

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### QUANTITY OF WORK

**Volume of issues resolved and calls**

| Level | Min. Qty. | Description   | Value = 41 |
|-------|-----------|---|------------|
| 1.    |           | Slow and unproductive. Unable to carry required workload. |            |
| 2.    | 70        | Average issues per hour.                                  |            |
| 3.    | 75        | Average issues per hour.                                  |            |
| 4.    | 80        | Average issues per hour.                                  |            |
| 5.    | 85        | Average issues per hour.                                  |            |

### PRODUCT KNOWLEDGE

**Knowledge of products and services.**

| Level | Description  | Value = 38 |
|-------|--|------------|
| 1.    | Has inadequate knowledge of products and services. |            |
| 2.    | Minimal knowledge of products and services.        |            |
| 3.    | Acceptable knowledge of products and services.     |            |
| 4.    | Above average knowledge of products and services.  |            |
| 5.    | Exceptional knowledge of products and services.    |            |

### TELEPHONE SKILLS

**Ability to handle multiple phone lines and phone tasks efficiently.**

| Level | Description  | Value = 35 |
|-------|--|------------|
| 1.    | Calls frequently handled by auto attendant or mishandled on transfer to employees.                       |            |
| 2.    | Calls occasionally handled by auto attendant or mishandled on transfer to employees.                     |            |
| 3.    | Answering phone calls and handling phone tasks in an acceptable manner.                                  |            |
| 4.    | Calls rarely handled by auto attendant and phone tasks handled beyond expectations of co- workers.       |            |
| 5.    | Exceptional phone skills. Calls never handled by auto attendant and phone tasks handled extraordinarily. |            |

### JOB KNOWLEDGE

**Level of knowledge in the primary job assignment.**

| Level | Description   | Value = 34 |
|-------|---|------------|
| 1.    | Unable to perform duties because of insufficient knowledge.   |            |
| 2.    | Has difficulty performing duties. Needs more training.        |            |
| 3.    | Has sufficient knowledge to perform all required duties.      |            |
| 4.    | Has knowledge to perform duties well beyond job requirements. |            |
| 5.    | Exceptionally astute. Constantly expands knowledge and scope. |            |

### COMPANY KNOWLEDGE

**Familiarity with services and the various department functions and responsibilities.**

| Level | Description  | Value = 30 |
|-------|--|------------|
| 1.    | Poor understanding of services and responsibilities of various department functions.       |            |
| 2.    | Basic understanding of all services and responsibilities of various department functions.  |            |
| 3.    | Good understanding of all services and responsibilities of various department functions.   |            |
| 4.    | Strong understanding of all services and responsibilities of various department functions. |            |
| 5.    | Very HOT for his job!  |            |

### ATTENDANCE

**Being on the job during scheduled work hours.**

| Level | Min. Qty. | Description  | Value = 29 |
|-------|-----------|--|------------|
| 1.    |           | Percent of time on the job. Not satisfactory.              |            |
| 2.    | 97        | Percent of time on the job. Needs improvement.             |            |
| 3.    | 98        | Percent of time on the job. Not abusive.                   |            |
| 4.    | 99        | Percent of time on the job. Very few days absent.          |            |
| 5.    | 100       | Percent of time on the job. Has perfect attendance record. |            |

## COMMUNICATION

**Communicates by listening, reiterating, understanding, and transferring information clearly, tactfully and concisely.**

| <u>Level</u> | <u>Description</u>   | Value = 28 |
|--------------|--|------------|
| 1.           | Employee does not follow communication guideline standards.              |            |
| 2.           | Employee's ability to follow communication guidelines needs improvement. |            |
| 3.           | Employee follows most communication guidelines.                          |            |
| 4.           | Employee follows communication guidelines.                               |            |
| 5.           | Employee always communicates in an outstanding manner.                   |            |

## MULTI-TASKING

**Ability to remain effective and efficient when handling more than one task at a time, i.e. talking and coding.**

| <u>Level</u> | <u>Description</u>  | Value = 22 |
|--------------|---|------------|
| 1.           | Employee is able to focus on only one task at a time.   |            |
| 2.           | Employee can work on more than one task at a time, but attention to detail suffers; errors or omissions are common. |            |
| 3.           | Employee can perform multiple task within scope of job without loss of effectiveness or efficiency.                 |            |
| 4.           | Employee remains effective and efficient after several hours of multitasking within areas of job scope.             |            |
| 5.           | Employee performance does not suffer in other evaluated areas even after several hours of multitasking.             |            |

## IN/OUT PHONE CVERAGE

**Takes inbound calls and performs outbound calls as identified per department average, excluding dialer calls.**

| <u>Level</u> | <u>Min. Qty.</u> | <u>Description</u>  | Value = 20 |
|--------------|------------------|---|------------|
| 1.           |                  | Performs a combined total of 70 or less inbound and outbound calls per day. |            |
| 2.           | 71               | Performs between 71 and 80 inbound and outbound calls per day.              |            |
| 3.           | 81               | Performs between 81 and 90 inbound and outbound calls per day.              |            |
| 4.           | 91               | Performs between 91 and 100 inbound and outbound calls per day.             |            |
| 5.           | 100              | Performs more than 100 inbound and outbound calls per day.                  |            |

## DOCUMENTATION

**Includes who, what, where, why, how the issue was reached, resolved, thorough, accurate and categorized properly.**

| <u>Level</u> | <u>Description</u>   | Value = 17 |
|--------------|--|------------|
| 1.           | Documentation is unacceptable.   |            |
| 2.           | Documentation is below required standards.   |            |
| 3.           | Documentation includes required information. (8 out of 10 doc sites are complete.) |            |
| 4.           | Documentation exceeds requirements. (9 out of 10 doc sites are complete.)          |            |
| 5.           | Documentation is exceptional. (10 out of 10 doc sites are complete.)               |            |

## DEPT PROCEDURES

**Employees adheres to department procedures and guidelines as defined.**

| <u>Level</u> | <u>Description</u>   | Value = 12 |
|--------------|--|------------|
| 1.           | Employee does not adhere to department procedures and guidelines.  |            |
| 2.           | Employee rarely adheres to department procedures and guidelines.   |            |
| 3.           | Employees usually adheres to department procedures and guidelines. |            |
| 4.           | Employees adheres to department procedures and guidelines.         |            |
| 5.           | Employees always adheres to department procedures and guidelines.  |            |

## QUALITY OF WORK

**Quality of work is thorough, accurate, neat, and presented well.**

| <u>Level</u> | <u>Description</u>   | Value = 10 |
|--------------|--|------------|
| 1.           | Quality of work is unacceptable.   |            |
| 2.           | Quality of work is below requirements and contains careless/frequent errors. |            |
| 3.           | Quality of work meets requirements.  |            |
| 4.           | Quality of work exceeds requirements.  |            |
| 5.           | Quality of work is exceptional.  |            |

## TIME MANAGEMENT

**Prioritizes account management duties, phone coverage needs and other projects based on urgency levels.**

| <u>Level</u> | <u>Description</u>  | Value = 9 |
|--------------|---|-----------|
| 1.           | Does not prioritize daily tasks or use time effectively.                                      |           |
| 2.           | Has difficulty prioritizing daily tasks.  |           |
| 3.           | Usually prioritizes daily tasks and completes projects.                                       |           |
| 4.           | Prioritizes and completes daily tasks and projects.   |           |
| 5.           | Excellent at prioritizing daily tasks and projects, and is able to assist others proactively. |           |

## TEAMWORK

**Works well with others to achieve individual and organizational success.**

| <u>Level</u> | <u>Description</u>  | Value = 7 |
|--------------|---|-----------|
| 1.           | Causes problems and conflicts. Usually must work alone.   |           |
| 2.           | Can work with others, but often does not display teamwork.  |           |
| 3.           | Regularly communicates and works well with others to achieve success.                             |           |
| 4.           | Encourages teamwork, works well with others and occasionally takes initiative to achieve success. |           |
| 5.           | Encourages teamwork, works well with others and always takes initiative to achieve success.       |           |

## PROBLEM SOLVING

**Gathering the necessary information, using good judgement to solve problems.**

| <u>Level</u> | <u>Description</u>  | Value = 6 |
|--------------|---|-----------|
| 1.           | Does not gather information and does not use good judgement.  |           |
| 2.           | Gathers some information to solve problems, but does not use good judgement.  |           |
| 3.           | Usually gathers the necessary information to solve problems and generally uses good judgement with some direction.  |           |
| 4.           | Good problem solver, gathers the necessary information and makes good decisions with some direction.                |           |
| 5.           | Excellent at gathering all necessary information and makes the best possible decisions with little or no direction. |           |

## POLICY CONFORMANCE

**Ability to comply with company/department policies and procedures.**

| <u>Level</u> | <u>Description</u>  | Value = 4 |
|--------------|---|-----------|
| 1.           | Does not conform to policies. Below acceptable standards.   |           |
| 2.           | Struggles to comply with company and department policies and procedures.                                      |           |
| 3.           | Conforms to company and department policies and procedures.   |           |
| 4.           | Supports and conforms to company and department policies and procedures.                                      |           |
| 5.           | Serves as a leader in supporting and conforming to policies and procedures. Appropriately seeks improvements. |           |

## RESOURCEFUL

**Uses reference materials provided, acts independently when necessary and contacts other resources when appropriate.**

| <u>Level</u> | <u>Description</u>   | Value = 5 |
|--------------|--|-----------|
| 1.           | Does not use reference materials provided and contacts other resources inappropriately.                                  |           |
| 2.           | Needs improvement using reference materials provided and sometimes makes contacts with other resources when appropriate. |           |
| 3.           | Generally uses reference materials provided and regularly makes contacts with other resources when appropriate.          |           |
| 4.           | Always uses reference materials provided and makes contacts with other resources appropriately.                          |           |
| 5.           | Excellent use/knowledge of reference materials, assists with material development and makes contacts appropriately.      |           |

## ACCOUNTABILITY

**Dependable and takes pride and ownership in assigned responsibilities.**

| <u>Level</u> | <u>Description</u>   | Value = 5 |
|--------------|--|-----------|
| 1.           | Always blames others, is not dependable and does not take pride or ownership for work. |           |
| 2.           | Occasionally blames others and does not take pride or responsibility for work.         |           |
| 3.           | Usually takes pride and responsibility for work.                                       |           |
| 4.           | Always takes pride, ownership and responsibility for work.                             |           |
| 5.           | Extremely dependable, takes great pride and ownership in assigned responsibilities.    |           |

## ADAPTABILITY

**Ability to remain productive and efficient in reaction to frequently changing priorities and unexpected deadlines.**

| <u>Level</u> | <u>Description</u>   | Value = 5 |
|--------------|--|-----------|
| 1.           | Does not adapt to changing priorities or deadlines. Loses track of work in progress when priorities change.          |           |
| 2.           | Frequently becomes defensive when priorities or deadlines change. Requires direction to prioritize task.             |           |
| 3.           | Maintains productive and efficient when priorities and deadlines change. Remains focused without direct supervision. |           |
| 4.           | Welcomes the challenge presented by changing priorities and deadlines. Never loses focus on task or projects.        |           |
| 5.           | Excellent adaptability to change. Frequently seeks improved processes and initiates change.                          |           |

## EDUCATION & TRAINING

**Employee shows interest and takes education/training opportunities when available and applicable to the job.**

| <u>Level</u> | <u>Description</u>   | Value = 4 |
|--------------|--|-----------|
| 1.           | Employee has no interest and does not take advantage of educational programs available.                      |           |
| 2.           | Employee has little interest and has not successfully completed educational programs available.              |           |
| 3.           | Employee is interested and has successfully completed some educational programs available.                   |           |
| 4.           | Employee is interested and has successfully completed most of the educational programs available.            |           |
| 5.           | Employee is very interested, learns independently and has successfully completed all the programs available. |           |