

Your Organization

EMPLOYEE: Billery Sample
POSITION: Health Benefit Rep-Process claims & answer incoming calls.
EVALUATOR: Mary Knowalot
EVALUATION #: 265

EVALUATION DATE: Wed. May 23, 2001
ANNIVERSARY: Sun. May 30, 1976
POSSIBLE SCORE: 1,790
EMPLOYEE SELF SCORE: 1,222.6 3.42
EVALUATOR SCORE: 1,237.6 3.46

VALUE	EMP	EVALUATOR	DESCRIPTION OF PERFORMANCE FACTORS
42	3.3	3.3	QUANTITY OF WORK Volume of issues resolved and calls
38	3	4	PRODUCT KNOWLEDGE Knowledge of products and services.
34	4	3	JOB KNOWLEDGE Level of knowledge in the primary job assignment.
31	4	4	TELEPHONE SKILLS Ability to handle multiple phone lines and phone tasks efficiently.
30	3	3	COMPANY KNOWLEDGE Familiarity with services and the various department functions and responsibilities.
29	4	4	ATTENDANCE Being on the job during scheduled work hours.
28	3	3	COMMUNICATION Communicates by listening, reiterating, understanding, and transferring information clearly, tactfully and concisely.
22	4	4	MULTI-TASKING The ability to perform a variety of tasks at one time.
20	3	3	IN/OUT PHONE CVERAGE Takes inbound calls and performs outbound calls as identified per department average, excluding dialer calls.
17	3	3	DOCUMENTATION Includes who, what, where, why, how the issue was reached, resolved, thorough, accurate and categorized properly.
12	4	3	DEPT PROCEDURES Employees adheres to department procedures and guidelines as defined.
10	3	4	QUALITY OF WORK Quality of work is thorough, accurate, neat, and presented well.
9	3	3	TIME MANAGEMENT Prioritizes account management duties, phone coverage needs and other projects based on urgency levels.
7	3	4	TEAMWORK Works well with others to achieve individual and organizational success.
6	3	3	PROBLEM SOLVING Gathering the necessary information, using good judgement to solve problems.
4	4	4	POLICY CONFORMANCE Adherence to established policies and procedures.
5	3	3	RESOURCEFUL Uses reference materials provided, acts independently when necessary and contacts other resources when appropriate.
5	3	4	ACCOUNTABILITY Dependable and takes pride and ownership in assigned responsibilities.
5	3	4	ADAPTABILITY Extent to which employee adapts to the changes of the department and company.
4	4	3	EDUCATION & TRAINING Employee shows interest and takes education/training opportunities when available and applicable to the job.

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IMPROVING YOUR PERFORMANCE IN THE FOLLOWING AREAS WILL HELP IMPROVE YOUR SCORE

PTS	POSS	VAL	EVALUATOR	DESCRIPTION OF PERFORMANCE FACTORS
138.6	210	42	3.3	QUANTITY OF WORK (Qty 75.00 up to 80.00) Average issues per hour.
102	170	34	3	JOB KNOWLEDGE Has sufficient knowledge to perform all required duties. <i>Employee input = 4 : Has knowledge to perform duties well beyond job requirements.</i>
90	150	30	3	COMPANY KNOWLEDGE Good understanding of all services and responsibilities of various department functions.
84	140	28	3	COMMUNICATION Employee follows most communication guidelines.
60	100	20	3	IN/OUT PHONE CVERAGE (Qty 81.00 up to 91.00) Performs between 81 and 90 inbound and outbound calls per day.
51	85	17	3	DOCUMENTATION Documentation includes required information. (8 out of 10 doc sites are complete.)
36	60	12	3	DEPT PROCEDURES Employees usually adheres to department procedures and guidelines. <i>Employee input = 4 : Employees adheres to department procedures and guidelines.</i>
27	45	9	3	TIME MANAGEMENT Usually prioritizes daily tasks and completes projects.
18	30	6	3	PROBLEM SOLVING Usually gathers the necessary information to solve problems and generally uses good judgement with some direction.
15	25	5	3	RESOURCEFUL Generally uses reference materials provided and regularly makes contacts with other resources when appropriate.
12	20	4	3	EDUCATION & TRAINING Employee is interested and has successfully completed some educational programs available. <i>Employee input = 4 : Employee is interested and has successfully completed most of the educational programs available.</i>

I have reviewed the above items with my evaluator : _____ Date: _____
employee signature

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EMPLOYEE HAS DONE A VERY GOOD JOB IN THESE AREAS

VAL	EVALUATOR	DESCRIPTION OF PERFORMANCE FACTORS
38	4	PRODUCT KNOWLEDGE Above average knowledge of products and services. <i>Employee input = 3 : Acceptable knowledge of products and services.</i>
31	4	TELEPHONE SKILLS Calls rarely handled by auto attendant and phone tasks handled beyond expectations of co-workers.
29	4	ATTENDANCE (Qty 99.00 up to 100.00) Percent of time on the job. Very few days absent.
22	4	MULTI-TASKING Very good at performing multiple tasks with few errors.
10	4	QUALITY OF WORK Quality of work exceeds requirements. <i>Employee input = 3 : Quality of work meets requirements.</i>
7	4	TEAMWORK Encourages teamwork, works well with others and occasionally takes initiative to achieve success. <i>Employee input = 3 : Regularly communicates and works well with others to achieve success.</i>
5	4	ADAPTABILITY Can successfully adapt to changes of the department and company. <i>Employee input = 3 : Has the ability to adapt to changes of the department and company.</i>
5	4	ACCOUNTABILITY Always takes pride, ownership and responsibility for work. <i>Employee input = 3 : Usually takes pride and responsibility for work.</i>
4	4	POLICY CONFORMANCE Consistently follows policies and procedures and addresses concerns through established methods.

I have reviewed the above items with my employee: _____ Date: _____
 evaluator signature

Employee Needs

Employee feels a need to have more of the following needs in their work environment

- FLEXIBILITY
- DIRECT ANSWERS
- STRONG LEADERSHIP
- PRAISE
- RECOGNITION

Evaluator Signature: _____ Date: _____

Evaluator Comments:

QUANTITY OF WORK:

Production is a little above average. We however will be working daily with you to improve in this area.

EDUCATION & TRAINING:

We have outlined a set of objectives in a SPO. It is very important that you achieve the top level of performance concerning this performance component.

ADAPTABILITY:

The standards descriptions of performance levels for this factor do not adequately indicate her actual level of performance. I am giving Billery a 4.4 rating because she has performed at a rate higher than 4 but not quite well enough to receive the highest level of 5. She also received both a level 5 and level 4 SIR during the evaluation period which will help explain and justify this rating.

Evaluation Reviewed By:
