

UNIVERSITY MEDICAL CENTER

PERFORMANCE MANAGEMENT PROGRAM
JOB DESCRIPTION/PERFORMANCE APPRAISAL FORM

PART I - GENERAL JOB/PERFORMANCE INFORMATION

Employee Name:	
Job Title: Secretary/Receptionist	
Position Reports To: Administrative Council	
Department: Emergency Medical Services	Exempt/Non-Exempt: Non Exempt
Job Description Effective Date: Revised-Jan 2006	
Performance Appraisal Period:	

JOB SUMMARY:

Assists the EMS Administrative Staff by performing secretarial and general office duties. Receives and accurately routes telephone messages and written correspondence. Prepares, distributes, and maintains an orderly filing system of all memorandums, reports, and correspondence originating from and/or directed to the EMS office. Researches EMS patient records and other related EMS documents while insuring patient confidentiality. Completes clerical detail of the department with a high degree of accuracy. Completes special projects as required by the needs of the department and hospital while insuring a high degree of accuracy. Enters patient data and other billing information as determined by the needs of the department. Down loads EMS computers and responsible for compiling EMS report.

EDUCATION AND EXPERIENCE:

Graduation from an accredited high school or completion of a GED program approved by University Medical Center is required. Completion of a formal secretarial training program in typing, word processing, data entry, and general clerical training is strongly recommended. Related secretarial experience may be substituted for successful completion of a formal training program.

REQUIRED LICENSURE/CERTIFICATIONS/REGISTRATIONS:

None.

PHYSICAL CAPABILITIES:

Routinely, work is of medium physical demand with sitting, walking, and standing required for most tasks. Occasionally, some lifting of heavy boxes (records, etc.) may be required.

SKILLS AND ABILITIES

High degree of knowledge in general secretarial skills is essential. Working knowledge of EMS departments data base, word processing, and spread sheet computer software is essential. Must demonstrate the ability to perform a variety of clerical duties while maintaining a consistent quantity and quality of work.

ENVIRONMENTAL/WORKING CONDITIONS

Ordinarily, will work in a well-lighted, heated and ventilated building. Hours may vary to accommodate departmental needs but will routinely be 20 hours per week.

INTERACTION WITH OTHER DEPARTMENTS AND OTHER RELATIONSHIPS:

The ability to effectively interact with departmental and other hospital personnel while maintaining the confidentiality of sensitive information is essential.

NOTE: This job description/performance appraisal form does not describe all job responsibilities that may be assigned to this job. Job responsibilities may change from time-to-time.

PERFORMANCE APPRAISAL SECTIONS

INSTRUCTIONAL GUIDE

The next sections of the Job Description/Performance Appraisal Form are used to help management staff explain the job responsibilities, performance expectation, set goals, and evaluate job performance. Management Staff should provide employee with regular performance feedback to their employees. Job performance outcome should not be a surprise during the 90-day or annual performance evaluation meeting.

The Performance Appraisal Section contains:

- 1) Part II – Job Responsibilities - Technical Competence/Leadership Score Card
- 2) Part III – Policy Compliance and Organizational Behavior – Customary Standards
- 3) Part IV - Goal Accomplishments and Expected Goals
- 4) Part V – Mandatory Requirements
 - ◆ Mandatory Requirements/Compliance Reminders
 - ◆ Development Need and Improvement Plans
 - ◆ Performance Score Sheet
 - ◆ Signatures

Performance Ratings:

These performance ratings are used to evaluate an employee's performance.

5-Distinguished/ Exceptional:

Job performance is at the highest possible level when given this rating. Employee achieves performance outcomes that always and significantly exceed the job expectations. Job expectations are constantly performed at an exceptionally high quality level no matter the situation.

4-Commendable/Above Expectation:

Achieves performance expectation outcomes that frequently exceed the requirement or goal. Job expectations are performed with commendable quality.

3-Meets Expectations/Competent:

Employee meets and /or occasionally exceeds all job expectations. Job expectations are performed with quality. This rating recognizes solid quality performance and represents a job well done.

2-Meets Most Expectations/Development Needed/Provisional:

Employee meets most of the job expectations. Job performance is below standard and need improvement. Additional training may be needed. Corrective actions must be documented.

1-Rarely Meets Expectations/Unsatisfactory:

Employee rarely meets the job expectations. The employee has either shown value to the organization but lacks the job skills, or desire, or the employee has the skills to perform the task but needs a considerable amount of additional training and close supervision. At this rating, it may be necessary for the employee to seek another position where his/her skills are better suited. Employee must improve performance within a reasonable period in order to retain the position. Corrective action must be documented.

0-Does Not Meet Expectation/Poor:

Employee does not meet job expectation. Performance has numerous deficiencies. Performance requires continual and direct supervision. Termination may be required or necessary at this level. Action must be documented to justify continual employment.

NOTE: Managerial staff is required to provide documentation i.e. in the comment sections for job responsibilities, customary standards or goal accomplishments receiving a 0, 1, 2, 4 or 5 performance rating.

Weighting

Part II, Part III, and Part V are weighted to indicate the relative importance in overall performance appraisal summary. Weighting provides a consistence process for assessing job performance. The weights for each part are:

- ◆ **Part II – Job Responsibilities – Technical Competence/Leadership Score Card- 40%**
- ◆ **Part III – Policy Compliance and Organizational Behavior – Customary Standards - 40%**
- ◆ **Part IV – Goal Accomplishments and Expected Goals - 20%**

The total rating points for each of the parts are used calculate the overall performance score. The performance score determines the employee's merit increase percentage.

Performance Appraisal Instructional Guide

Performance Scoring

How to determine the total Performance Score?

	A. Total Points	B. Total Possible Points	C. Total Weight Percentage (a ÷ b = c)	D. Assigned Weights Percentage	E. Total Percentage Score (c X d = e)
Part II – Job Responsibilities - Technical Competence/ Leadership Score Card				.40	
Part III – Policy Compliance and Organizational Behavior- Customary Standards				.40	
Part IV – Goal Accomplishments				.20	
Total Percentage Score (Total Col. E)					

Step I: Total the number of points achieved for (1) Part I and (2) Part III and (3) Part IV.

Step II: Determine the Total Possible Points for each part.

Step III: Divide the total points by the Total Possible Points for (1) Part I and (2) Part III and (3) Part IV. You will arrive at the Total Weight Percentage.

Step III: Multiple the Total Weight Percentage by the weights assigned to each part.

Step IV: Total the Percentage Scores for each part to achieve the employee’s Total Percentage Score.

Step V: Look at the Total Percentage Score Range and the corresponding merit increase percentage. The employee will receive this merit increase percentage for their annual performance.

NOTE:

- ◆ **It is not necessary to complete Step V for the 90-day performance evaluations. A merit increase is not given for this evaluation.**
- ◆ **Employees must meet 50% or more of the total possible points in Part II, Part III and Part IV to receive a 4%, 5% or 6% merit increase.**
- ◆ **Vice President or above signature is required for a 4%, 5% or 6% merit increase.**

PART II - JOB RESPONSIBILITIES - WEIGHT ASSIGNED – 40%

TECHNICAL COMPETENCE

Every hospital employee is expected to display an acceptable level of technical competence in carrying out their assigned duties. The specific job responsibilities for this position are listed below.

JOB SPECIFIC RESPONSIBILITIES:

Stated Job Responsibilities	RATING POINTS
1. Serve as first point of contact for employees and the public. Greets employees and other office visitors and provides quick responses.	
Comments:	
2. Accurately receive, screen, and route telephone calls or forward messages.	
Comments:	
3. Pick up and distribute departmental mail daily and more frequently as needed.	
Comments:	
4. Set priorities and utilize sound judgment in organizing daily tasks.	
Comments:	
5. Demonstrates accuracy and efficiency in typing, data entry and word processing responsibilities. <ul style="list-style-type: none">▪ IDX Data Entry	
Comments:	
6. Distribute announcements and memos as needed.	
Comments:	
7. Duplicate materials by use of photocopying machines.	
Comments:	
8. Research EMS patient records and other related documents while insuring patient confidentiality.	

<ul style="list-style-type: none"> ▪ Is Custodian of Medical Records 	
Comments:	
9. Assists in the care and maintenance of departmental equipment and supplies.	
Comments:	
10. Completes all routine and special assignments accurately and in a timely manner. <ul style="list-style-type: none"> ▪ Down loads EMS computers ▪ Matches up PCR with signature page, and dispatch cards. 	
Comments:	
11. Remains flexible and positive when faced with unusual, difficult or problematic situations. Possesses the ability to adapt to changes in the workload.	
Comments:	
Total Points – Job Responsibilities - Technical Competence	

PART III - POLICY COMPLIANCE AND ORGANIZATIONAL BEHAVIORS - WEIGHT ASSIGNED – 40%

Every employee is expected to support the Hospitals Mission, Vision and Value Statements by demonstrating concern for quality, productivity and responsiveness in his/her work as evidenced by:

<u>RATING POINTS</u>	
<p><u>Attitude</u></p> <p><u>Example Behaviors:</u></p> <ul style="list-style-type: none"> ◆ Create a positive first impression. ◆ See, Speak & Smile. ◆ <u>Always</u> speak positively – <u>no</u> negative comments. ◆ Make each customer feel he is the most important person in the facility. ◆ Exceed customer expectations. ◆ Body language, tone and demeanor should always reflect a positive attitude. <i>Customers are not an interruption; they are our reason for being here.</i> <p style="text-align: center;"><u>Customers not only include patients and their family members, but your fellow paramedics and dispatchers.</u></p>	
<p>Comments:</p>	
<p><u>Communication</u></p> <p><i>Telephone:</i></p> <ul style="list-style-type: none"> ◆ Answer calls with “your department, station and your name”. ◆ Do not make or answer cell phone calls anytime during the course of an EMS response. <p><i>Radio:</i></p> <ul style="list-style-type: none"> ◆ Listen before you transmit, make certain that the channel/group is clear. ◆ Speak distinctly and pronounce words carefully. Speak at a moderate speed using your conversational tone of voice. Remain calm and cordial, words or voice inflections which reflect an individual’s irritation, disgust or sarcasm are not to be used. ◆ Avoid transmitting with the windows of the unit open while the sirens are operating, and do not transmit while the air horns are operating. 	

<ul style="list-style-type: none"> ◆ Do not transmit when you are causing feed back from another radio. ◆ Use official titles and unit designations. First names or nicknames for call locations are not to be used. ◆ It is prohibitive to transmit superfluous signals, messages of a personal nature, to use profanity or obscene language, to make unnecessary or unidentified transmissions. ◆ Humor and horseplay should be left to the comedians on commercial radio stations. ◆ All EMS personnel should maintain awareness of the need to conserve the use of radio time and make a conscious and positive effort to eliminate unnecessary use of the radio. ◆ Stress courtesy by setting the example. <p><i>Person-to-Person:</i></p> <ul style="list-style-type: none"> ◆ See, speak & smile. ◆ Introduce yourself by name. ◆ Use “please”, “thank you”, “sir”, and “ma’am” when appropriate. ◆ Use “Mr.” & “Ms.” with last name when addressing customers – until given permission to use first name. ◆ Use “Dr.” and last name for physician in front of patients. ◆ Be aware of customer presence during conversation. ◆ Be attentive to your tone of voice during conversation. ◆ Use easily understood language – avoid acronyms or professional jargon. 	
<p>Comments:</p>	
<p><u>Responsiveness</u></p> <p><u>Example Behaviors</u></p> <ul style="list-style-type: none"> ◆ Directions: ◆ Ask if help is needed. ◆ Escort or provide an escort to destination. ◆ Provide your business card or name and phone number for further assistance. ◆ Respond to all customer inquiries within 48 hours. ◆ Acknowledge voice mails and e-mails within 48 hours. ◆ Give customers a realistic time frame for a return call. ◆ When sending a fax, it is expected in 10 minutes. Let the recipient know if it will be longer. 	
<p>Comments:</p>	

Courtesy

Example Behaviors:

- ◆ Park in designated parking only.
- ◆ Acknowledge family members who are assisting you.
- ◆ Be courteous and professional towards bystanders and other responders.
- ◆ Tell the patient what you are going to do before you do it.
- ◆ Close curtains or doors for privacy-tell the patient why you are doing this.
- ◆ Patients should be appropriately covered or draped for privacy during transport.
- ◆ Always thank the customer for choosing/visiting UMC.
- ◆ Thank the customer for using Lubbock EMS.
- ◆ Communicate & apologize for any delays.

*Rudeness is **never** accepted.*

Comments:

Confidentiality

Example Behaviors:

- ◆ Don't discuss business, employee or patient information in public settings.
- ◆ Only authorized personnel can release patient information.
- ◆ Conduct conversations with or about customers in private areas.
- ◆ Access to patient information is limited only to employees involved in the patient's care.
- ◆ Keep computer screens and patient charts out of public view.
- ◆ Log off computer and keep passwords private.
- ◆ Keep fax machines and printers out of public reach.
- ◆ Be aware of students during conversations.
- ◆ Do not discuss yours or other employee's evaluations.
- ◆ Do not discuss yours or other employees pay rate.
- ◆ Do not discuss disciplinary action either concerning you or other employees.

Comments:

TeamWork

Example Behaviors:

- ◆ Be respectful of time away from work area (breaks, lunch, tardiness, leaving early). When you are away, someone else does your work.
- ◆ Report to duty on time and ready to work.
- ◆ Treat every co-worker as a professional. Recognize that we each have an area of expertise.
- ◆ Don't be afraid to ask for help.
- ◆ Be considerate of everyone's time – avoid last minute requests or changes.
- ◆ Offer help when possible – be supportive.
- ◆ Praise in public, coach in private.
- ◆ Be receptive to constructive criticism.
- ◆ Offer encouragement. Praise when a job is well done.
- ◆ Recognize that teamwork is built on trust. Foster this trust on every occasion.
- ◆ Respect and value different cultures and religious beliefs.

Comments:

Appearance

Example Behaviors

- ◆ Display your badge properly.
- ◆ Dress cleanly, neatly, decently, and professionally.
- ◆ Follow Dress Code for EMS Personnel, SPP 1.07.
- ◆ Follow organizational and departmental dress code.
- ◆ Keep your work area neat and tidy.
- ◆ Keep food and drink in designated areas. Make sure that food and drink are properly covered during transport.
Your dress influences your attitude and the perception of care by others.

Comments:

Ownership

Example Behaviors

- ◆ Create an open and friendly environment.
- ◆ Know and understand the responsibilities of your job. Take charge and accept those responsibilities.
- ◆ Be supportive of the team.
- ◆ Say what you mean-mean what you say-prove it by your actions.
- ◆ Do the right job at the right time.
- ◆ Use scripting when appropriate.
- ◆ Keep all areas (hallways, stairwells, etc.) clean and tidy. Pick up litter.
- ◆ Strive for improvement.
- ◆ Take pride in UMC as if you owned it.
- ◆ Represent UMC positively in the community.
- ◆ Represent EMS positively in the community.

Comments:

Total Points – Policy Compliance and Organizational Behaviors

Corporate Compliance Program, Patient Safety Plan, Employee Safety Plan

These Policy Compliances require only a **YES** or **NO** response;

Every employee is expected to meet all of these performance compliances. Managers will evaluate employees using a YES or NO response instead of the 1 – 5 performance ratings. YES indicates that the employee has met, if applicable, the described behaviors. These performance compliances will not be used when determining the Total Points for the Policy Compliance and Organizational Behaviors.

Corporate Compliance Program

Behaviors:

- ◆ Follows the Compliance Program standards designed to prevent, detect, correct and discipline non-compliant behavior:
- ◆ Participates in initial and continuing educational activities related to the Compliance Plan.
- ◆ Complies with all applicable laws, regulations, policies and procedures.
- ◆ Reports known or suspected violations of the law or the Compliance Plan and

<p>makes that report in good faith with no malicious intent</p> <ul style="list-style-type: none"> ◆ Completes the Compliance annual in-service and Acknowledge form. 	
<p>Comments:</p>	
<p><u>Patient Safety Plan</u> Participates in the hospital-wide integrated, <u>Patient Safety Plan</u>, in all aspects of patient care delivery and support, in order to proactively identify, reduce and manage risk.</p> <p><u>Behaviors:</u></p> <ul style="list-style-type: none"> ◆ Participates in ongoing education activities related to Patient Safety. ◆ Participates in the design, development and implementation of risk reduction strategies. ◆ Reports unusual occurrences utilizing the appropriate documents, and refers them to Risk Management, Pharmacy, etc. ◆ Completes the Patient Safety annual In-service. 	
<p>Comments:</p>	
<p><u>Employee Safety Plan</u> Provides or facilitates in providing a clean, safe, quiet and secure workplace environment for all.</p> <p><u>Behaviors:</u></p> <ul style="list-style-type: none"> ◆ Reports any unusual/deficient workplace environment issues to your immediate supervisor, or other location as defined in Hospital and Departmental Policy and Procedures. (i.e. job-related hazards). ◆ Reports workplace injuries to immediate supervisor or the Employee Health Department. ◆ Corrects and/or reports unsafe, unsecured or unclean environment to immediate supervisor and/or Environmental Services and/or Facility Services. ◆ Disposes of hazardous chemicals or wastes according to hospital and departmental policies. (i.e., proper use of red bags and sharps disposal containers.) ◆ Keeps work area neat and organized to maintain a safe workplace environment. ◆ Completes the Environment of Care annual in-services. 	
<p>Comments:</p>	

PART IV - GOAL ACCOMPLISHMENTS AND EXPECTED GOAL ACCOMPLISHMENTS WEIGHT ASSIGNED- 20%

This part reviews the established goals for the performance appraisal period.

Defined Goal (s)	Results and Comments	Rating Points

Total Points – Goal Accomplishments	

EXPECTED GOAL ACCOMPLISHMENTS FOR PERFORMANCE YEAR: _____

Defined Goal (s) Expected Goal (s)	Expected Outcome or Results



PART V – MANDATORY REQUIREMENTS

This part reviews the mandatory requirements/compliance reminders and development and improvement plans:

MANDATORY REQUIREMENTS/COMPLIANCE REMINDERS:

Check appropriate box (es)

In-Services	
Educational Requirements (i.e., leadership)	
TB Test and/or other Employee Health Test	
License, Registration, Certification	
Age-specific core competency compliance	
Core competencies <ul style="list-style-type: none">▪ Is familiar with the Environment of Care and successfully passed an exam covering each topic.	

NOTE: An Educational Resource development training course sheet displaying the above training/education should be attached to the performance appraisal.

DEVELOPMENT NEED AND IMPROVEMENT PLANS:

(Listed below is the specific agreed upon activities to improve areas of performance. Record developmental activities and action plans to further enhance the employee’s capabilities and competencies, which include: in-service, outside training and education, self-developments, etc.)

PERFORMANCE SCORE SHEET:

	A. Total Points	B. Total Possible Points	C. Total Weight Percentage (a ÷ b = c)	D. Assigned Weights Percentage	E. Total Percentage Score (c X d = e)
Part II – Job Responsibilities - Technical Competence/ Leadership Score Card	48	55	.87	.40	
Part III – Policy Compliance and Organizational Behavior- Customary Standards	32	40	.80	.40	
Part IV – Goal Accomplishments	12	15	.80	.20	
Total Percentage Score (Total Col. E)					

Determine which merit increase range the total score from above falls into to determine employees merit increase.

TOTAL

PERCENT SCORE RANGE

MERIT INCREASE

95-100%	6.0%
85-94%	5.0%
70-84%	4.0%
55-69%	3.0%
40-54%	2.0%
25-39%	1.0%
0-24%	0.0%

MERIT INCREASE FOR THIS EVALUATION = _____

NOTE:

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- ◆ **Vice President or above signature is required for a 4%, 5% or 6% merit increase.**

ADDITIONAL COMMENTS:

SIGNATURES:

Employee’s Signature _____ Date _____

Appraiser’s Signature _____ Date _____

Manager/Director’s Signature _____ Date: _____

*Signature signifies receipt of appraisal only, and does not indicate agreement.

PERFORMANCE EVALUATION DOCUMENTATION

CHECKLIST

The Performance Evaluation Documentation Checklist ensures that all appropriate documentation is complete and attached to the performance appraisal form.

Employee Name: _____ Department: _____

Check off all of the appropriate performance appraisal documentation that is included with your checklist:

- Appraisal Form Job Description/Performance**
 - 90-Day Evaluation- included initial competency form
 - Annual Evaluation

- Education Resources (Staff Development) Training Sheets(s)**
Send all certificates, registrations, and memberships to this department.

- Annual Competency Worksheet (if applicable)**

- Personnel Action Form (Merit Increase or Salary Adjustments)**
0-3% increases - Department Director Only
4-6% increases - Administrative Signature Required
All salary adjustments require a Administrator's signature.

- Job Description/Performance Appraisal (Title changes/ New Positions Only)**
A new Job Description/ Performance Appraisal Form is required for all position changes.

Note: The Human Resources Department will return all paperwork if this sheet is not attached to the performance appraisal paperwork.