

## INTRODUCTORY EVALUATION

Introductory Evaluations for the first 90 days are necessary for three reasons:

- First, they are a requirement from accrediting bodies
- Almost all labor law requires some point at which you decide someone is to continue in employment.
- Finally and most importantly, they are a critical part of effective management of new personnel. Too often, new employees start their job and, if there are no obvious problems, are forgotten. Introductory evaluations are there to remind you to evaluate them at 90 days, and then to set terms for growth from that point.

Some call the first 90 days of employment a “probationary” period, the recommended term is “introductory”. Calling this term “probationary” implies an employment contract (refer to the section on policies and the MED U course *MGT 301 – Employment Law*)

The purpose of this evaluation is to see how they have done, outline strengths and weaknesses and suggest areas for improvement. Also, most in HR management would suggest that you set some measurable goals for the next 90 days of employment after that initial 3 months of employment.

To create an Introductory Evaluation, open up an Individual Employee’s page. As a Super Manager, click on **VIEW EMPLOYEES** and the list of all employees will come up.

**VIEW...**

- Job Descriptions**
- Employees**
- Managers**
- Introductory Evaluations**
- Training Documents**
- Coaching Documents**
- Applause Documents**
- Disciplinary Actions**
- Periodic Evaluations**
- Annual Reviews**

**MED Supply Company**

Click on an employee to open for viewing and editing.

Del?	Employee Name	Employee ID	Job Description	Hire/Eval Date	Status
	<a href="#">Billy Johnson</a>	8998	<a href="#">Billing - Collections and Denials</a>	11/09/2005	Active
	<a href="#">Dolly Madison</a>	4321	<a href="#">Respiratory Therapist - Vent</a>	10/7/2005	Active
	<a href="#">Doug Doug</a>	6489	<a href="#">rehab tech 1</a>	11/17/2006	Active
	<a href="#">Gary Weems</a>	1212	<a href="#">AA HR</a>	10/02/2006	Active
	<a href="#">Glenn Close</a>	6666	<a href="#">CSR 1</a>	10/7/2005	Active
	<a href="#">Han Dee Mann</a>	9834	<a href="#">Administrative Assistant- Service</a>	10/07/2005	Active
	<a href="#">James Doe</a>	9040	<a href="#">customer service rep</a>	10/10/2006	Active
	<a href="#">Jane RT</a>	1569	<a href="#">Respiratory Therapist- Vent</a>	10/05/2006	Active
	<a href="#">Jason Wainright</a>	125	<a href="#">CSR 1</a>	1/30/2006	Active
	<a href="#">JAYCEE MOORE</a>	4506	<a href="#">RESPIRATORY SERVICE TECH 1</a>	03/17/2006	Active
	<a href="#">Jim Smith</a>	1111		10/07/2005	Active

As a Manager, simply enter your Manager’s Page for a listing of all of your employees to whom you have access.

Welcome Pam Jones! What would you like to do today?

Employee Name	Employee ID	Job Description	Hire Date	Status
<a href="#">Mary Jones</a>	9236495151	<a href="#">CSR/Reimbursement Specialist</a>	11/30/2005	Active
<a href="#">Pam Tom</a>	9872	<a href="#">Billing - Collections and Denials</a>	11/20/2006	Active
<a href="#">Tony Soprano</a>	4444	<a href="#">Billing - Collections and Denials</a>	10/7/2005	Active
<a href="#">Uma Thurman</a>	976431	<a href="#">Reimbursement Specialist</a>	11/14/2006	Active
<a href="#">William Shatner</a>	676869	<a href="#">Reimbursement Specialist</a>	11/14/2006	Active

Click on the name of the employee for whom you want to create this evaluation and their page comes up. Click on create **INTRODUCTORY EVALUATION**.

CREATE...
<b>Training Document</b>
<b>Coaching Document</b>
<b>Applause Document</b>
<b>Disciplinary Action</b>
<b>Periodic Evaluation</b>
<b>Annual Review Self-Evaluation</b>
<b>Annual Review</b>
<b>Introductory Evaluation</b>

Actually, before you begin, if you created a **TRAINING DOCUMENT** for this employee, you will want to open that document and see if they completed their required training. You can access that either from the **EMPLOYEE LOG** or by clicking on **VIEW TRAINING DOCUMENT**. (For more on **TRAINING DOCUMENTS**, review that chapter on this CD.)

**view/print full employee log**

Del?	Date	Log Entry (first 80 characters)
	11/30/2006	Periodic Evaluation created by Pam Jones on 11/30/2006
	11/29/2006	William was 2 hours late today - 2nd day this week
	11/29/2006	SIGNED JOB DESCRIPTION ATTACHED
	11/01/2006	Annual Review created by Pam Jones on 11/01/2006
	10/29/2006	Coaching Document created by Pam Jones on 10/29/2006
	09/29/2006	Applause Document created by Pam Jones on 9/29/2006
	09/15/2006	Disciplinary Action created by Pam Jones on 9/15/2006
	09/15/2006	Introductory Evaluation created by Pam Jones on 9/15/2006
	06/26/2006	Training Document Action created by Pam Jones on 6/26/2006

VIEW...
<b>Training Documents</b>
<b>Coaching Documents</b>
<b>Applause Documents</b>
<b>Disciplinary Actions</b>
<b>Periodic Evaluations</b>
<b>Annual Reviews</b>
<b>Introductory Evaluation</b>
<b>Job Description</b>

You will want to print that Training Document out and make certain that all of the training is complete. When you open the **INTRODUCTORY EVALUATION**, this is the form that will come up. Note the very first question is on **Training Status**. If the training is not complete, then you would note what needs to be completed in the field **Incomplete Training** (and keep in mind that if there is additional training that needs to be done that wasn't completed, you will want to put them on a short leash to get it done. That should be reflected in the **Follow Up Date** you select)

<b>Employee Name</b> William Shatner	<b>Job Title</b> Reimbursement Specialist
<b>Department</b> Billing	<b>Manager</b> Pam Jones
<b>Employee ID</b> 676869	<b>Date</b> 11/29/2006
<b>Training Status</b> Did the employee satisfactorily complete their training schedule? Yes <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/>	
<b>Incomplete Training</b> If not, what needs to be completed and when? <input type="text"/>	

### Overview and Comments

The next key part is Overview and Comments. There are five questions we've placed in this field:

- Are they grasping their workflow?
- Are they asking good questions?
- Are they interacting with their team and within the company?
- Are they showing initiative?
- Are they reliable in attendance and punctuality?

You don't have to use these questions at all. However, let me tell you why they are in there. It is actually very difficult to effectively judge someone on their job tasks after just 90 days. There simply may be too much for them to learn for you to fairly judge that. However, working with a group of HR experts, we agreed on the questions above as being critical to that employee's performance, plus being the kind that could and should be answerable after 90 days. If you can answer positively to each of these, then you have a good potential employee on your hands. If you answer no to all of them, no matter their product knowledge, you've got problems ahead.

### Overview and Comments

*Enter any comments in the space provided. Use the default questions as a starting point.*

Are they grasping their workflow? Yes, excellent job	▲
Are they asking good questions?	☰
Are they interacting well with their team and within the company?	
Are they showing initiative?	
Are they reliable in attendance and punctuality?	▼

### Continued Employment?

*Will this employee continue in our employ?*

Yes ▼

Note the final critical element on this part of the page – Will this employee continue in our employ? The pull down box offers the choice between yes or no.

### New Goals and/or Special Assignments

The next step is to create new goals or special assignments as the result of this evaluation. Most would recommend that you create goals for the next 90 days, and follow up then. If you already know what goals you want to set, then you simply type them in the empty field you see. Or, if you want help from EmTrak, then you can use our coaching suggestions, task by task. If you've already studied about [COACHING DOCUMENTS](#), then you recognize all of this.

Click on [Click here for a list of coaching items based on this employee's job description.](#)

**New Goals and/or Special Assignments**

*If you choose, create any new goals or special assignments. [Click here for a list of coaching items based on this employee's job description.](#)*



**Employee Comments** 

EmTrak will bring up the tasks that you've assigned to this job description. Let's say that for William we want him to focus on improving phone skills and wearing more professional attire. We will select those tasks. Place a check besides those two, then click on the NEXT button.

**Reimbursement Specialist -- Phone Skills**

- ◇ Answer phones by the third ring, using all features of the phone effectively and using "hold" only for short times and with good follow up.
- ◇ Speak clearly and provide excellent customer service over the phone, through tone and style, assisting customers directly when appropriate and at other times routing incoming calls to the appropriate member.
- ◇ Write down messages accurately or politely direct callers to voice mail, when appropriate.

**Reimbursement Specialist -- Other Duties or Tasks may be assigned on an as-needed basis**

- ◇ When necessary, provide assistance to others when workloads increase.
- ◇ Take initiative in finding ways to contribute to the organization.
- ◇ Be willingly involved in cross training, when possible.

**HME Staff and Professional -- Professional Approach**

- ◇ Display on time attendance and dependability.
- ◇ Maintain the company's image and reputation at the highest possible level.
- ◇ Conduct oneself in a professional and ethical manner at all time, including personal appearance and appearance of the workplace.
- ◇ Maintain a neat appearance. Wear a name badge as required or requested.

A list of possible coaching suggestions will come up based on those tasks. In this case we want William to focus on better using our phone system and then want some improvement in professional appearance. We select those items, and then click on Insert Coaching Details.

**Reimbursement Specialist -- Phone Skills**

- \*\* Target: Skilled use in the features of our phone system**  
*Work with supervisor and a skilled employee to first nail down those features of the phone that must be mastered, such as transferring, hold, voice mail. Once the list is complete, then work with that person to make sure every element is nailed down and you are proficient in that skill. Complete before the next review.*
- \*\* Target: Excellent customer service on the phone**  
*Take MED U Course CS 102 – Telephone Courtesy and Customer Service and discuss critical elements with the with supervisor, focusing on how to answer the phone, how to end a conversation and dealing with customer problems on the phone. If necessary, prepare scripts of how the phones will be answered, etc. By the next review, the key is to experience no problems such as the phone not being answered, improper greetings or endings, calls dropped or customer complaints.*
- \*\*\*\* Productivity Goal**  
*By the date noted below, we have agreed upon a goal where you will receive and document an average of \_\_\_\_\_ calls per day/week/month.*

**HME Staff and Professional -- Professional Approach**

- \*\* Target: Punctuality and dependability, every day**  
*Come to an agreement with your supervisor that before the next review, you will have no more than one time late in reporting to work.*
- \*\*\*\* Productivity Goal**  
*By the date noted below, we have agreed upon a goal where you will be on time and present 100 percent of that time.*
- \*\*\*\* Productivity Goal**  
*By the date noted below, you will have properly worn your uniform or proper office attire and name tag each work day through that date.*

**Insert Coaching Details**

**Close Window**


They are placed in the Introductory Evaluation. Now, keep in mind that these are still fully editable. Perhaps the statements inserted only get you 80% there. You can change words, delete sentences, anything you want.

**New Goals and/or Special Assignments** 

*If you choose, create any new goals or special assignments. [Click here for a list of coaching items based on this employee's job description.](#)*

**\*\* Target: Skilled use in the features of our phone system**  
Work with supervisor and a skilled employee to first nail down those features of the phone that must be mastered, such as transferring, hold, voice mail. Once the list is complete, then work with that person to make sure every element is nailed down and you are proficient in that skill. Complete before the next

If any of these goals involved MED U courses, then click on EMAIL MED UNIVERSITY. That link will automatically bring up your email mechanism on your computer. Simply **copy and paste these goals into the body of that email**, email to us in the address provided, and we will follow through immediately with your employee.

**Goals & Action Plan** 

*What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager? [Click here to insert predefined coaching suggestions based on category.](#)*

\*\*\* Target: Effective collection of all required documents  
 Take the MED U course REM 102 – Reimbursement and Documentation and after completion, review the proper procedures with management. Get the processes down on paper in an easily understandable format, define needed improvements with manager, then follow through before next review.

<b>Gary Schwartz/MED Group</b> 12/05/2006 01:56 PM	To: medu@medgroup.com
	cc:
	bcc:
	Subject: MEDU Notification from EmTrak 3.1 - From Pam Jones of MED Supply Company

MEDU Admin, please sign up William Shatner (wshatner@medgroup.com) for the following courses:


\*\* Target: Effective collection of all required documents  
 Take the MED U course REM 102 - Reimbursement and Documentation and after completion, review the proper procedures with management. Get the processes down on paper in an easily understandable format, define needed improvements with manager, then follow through before next review.

Pam Jones  
 MED Supply Company

**Follow-up Date and Introductory Evaluation Status**


Next, set the Follow-up Date (remember our recommendation that you normally follow up 90 days after an Introductory Evaluation.) You will get a reminder 7 days before that date that it's time to follow up. Also, set the Introductory Evaluation Status to Complete – that turns off the email reminder that an Introductory Evaluation is due, but you can still come back in and edit. Ninety days from now, you may want to come back into this document, make

**Continued Employment?**  
*Will this employee continue in our employ?*  
 Yes ▾

**Goals and/or Special Assignments** 

*What should be the focus of this employee now?. [Click here for a list of coaching items based on this employee's job description.](#)*

\*\* Target: Efficient flow of files and records  
 Work with the supervisor, the company's trainer, or a skilled peer to define the proper processes and flow for files. Get the processes down on paper in an easily understandable format and discuss with manager, then follow through before the next review.

**Follow-Up Date**  
*When would you like to follow up on this introductory evaluation?*  
 02/19/2007  Today is 11/29/2006

**Introductory Evaluation Status**  
*What is the status of this introductory evaluation?*  
 Open ▾  
 Open  
 Complete  
 Sealed

Signature: \_\_\_\_\_

Reviewer Signature: \_\_\_\_\_

Review Date: \_\_\_\_\_

some final comments, then note that it is SEALED – no longer editable. PRINT the evaluation out and discuss it with your employee, making sure that he/she is clear on the next 90 days and future goals.

### Completing the Introductory Evaluation

You printed out the Introductory Evaluation and have discussed it with your employee. Now it is 90 days later and time to follow-up on goals you set. Simply click on this employee's name on your Manager's Page, then you can either select the document in the Employee Log or click on **VIEW > INTRODUCTORY EVALUATION**.

**View/Print Full Employee Log**

Del?	Date	Log Entry (first 80 characters)
	<a href="#">12/06/2006</a>	Applause Document created by Jim Smith on 12/06/2006
	<a href="#">11/30/2006</a>	Periodic Evaluation created by Pam Jones on 11/30/2006
	<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week
	<a href="#">11/29/2006</a>	✍ SIGNED JOB DESCRIPTION ATTACHED
	<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006
	<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006
	<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 09/29/2006
	<a href="#">09/15/2006</a>	Disciplinary Action created by Pam Jones on 09/15/2006
	<a href="#">09/15/2006</a>	Introductory Evaluation created by Pam Jones on 09/15/2006
	<a href="#">06/26/2006</a>	Training Document Action created by Pam Jones on 06/26/2006

**Log Entry:**  
Enter comments in the space provided.  
Introductory Evaluation created by Pam Jones on 9/15/2006

**Original Document:**  
Click on the icon below to open the original document.

**VIEW...**

- [Training Documents](#)
- [Coaching Documents](#)
- [Applause Documents](#)
- [Disciplinary Actions](#)
- [Periodic Evaluations](#)
- [Annual Reviews](#)
- [Introductory Evaluation](#)
- [Job Description](#)

The document is up. Now, click on Edit Introductory Evaluation on the upper left-hand side. That will bring up the original document, but now you have the ability to change as needed and add comments.

**Edit Introductory Evaluation**
**Return to Menu**

<b>Employee Name</b> William Shatner	<b>Job Title</b> Reimbursement Specialist
<b>Department</b> Billing	<b>Manager</b> Pam Jones
<b>Employee ID</b> 676869	<b>Date</b> 11/29/2006

**Goals and/or Special Assignments**

What should be the focus of this employee now? [Click here for a list of coaching items based on this employee's job description.](#)

manager, then follow through before the next review.

12/5/2006 1:55 PM All goals complete.

**Follow-Up Date**  
When would you like to follow up on this introductory evaluation?  
02/19/2007 Today is 12/6/2006

**Introductory Evaluation Status**  
What is the status of this introductory evaluation?

Complete ▾  
Open  
Complete  
Sealed

Signature: \_\_\_\_\_

If the goals are all complete, then click on the pencil icon and add your comments to note that. Change the Introductory Evaluation Status to SEALED. You are done! Click NEXT. You may choose to print two copies, one for your employee and one for the permanent files on that new employee. Be reminded that if you scan in that signed document, you can attach it under **THE EMPLOYEE LOG**. Review that chapter