**Student Services**

1. **Student Registration**

* Ensure students are registered in necessary courses and/or health insurance by applicable deadlines.
  + Exceeding expectations may include being proactive in anticipating needs of students, faculty, and department administrators providing guidance and assistance when needed.

1. **Departmental Course Management Coordination**

* Ensure that appropriate space is reserved for departmental courses and that departmental courses are set up appropriately so they may be registered for by applicable deadlines.
  + Exceeding expectations may include being proactive by reaching out to instructors to evaluate possible classroom selection changes to facilitate a better learning environment, anticipating changes in demand for course offerings, and providing consultation in the facilitation of the creation of new courses.

1. **Customer Service**

* Counsel/assist students during their tenure in program on policies, procedures, and guidelines. Serve as a facilitator between students, faculty, and administrators. Position will also ensure handbooks and other relevant information is updated in a timely fashion when needed (i.e. when program changes occur, new students enroll).
  + Exceeding expectations may include communicating to students and faculty resources available to promote student development (i.e. fellowship opportunities) and proactively updating program information in anticipation of program changes.

1. **Payment of Tuition and Stipends**

* This position is responsible for reaching out to PI’s (and sometimes departmental administrators when needed) to ensure correct funding sources are being used. Position is also responsible for determining when stipend amount adjustments need to occur (i.e. student receives fellowship) and ensuring tuition and fees are paid before applicable deadlines.
  + Exceeding expectations may include anticipating when funding changes will need to occur and informing departmental administrators (i.e. ending fellowships), and proactively informing faculty/departmental administrators of any applicable changes to rates or program policy (i.e. health insurance costs).

1. **Data Collection**

* This position will be responsible for collection of data related to the student programs managed by the department. This includes data such as student funding information, graduation rates, course and program enrollment, and other frequently requested information related to department student programs.
  + Exceeding expectations may include evaluating data to recognize trends and suggesting possible courses of correction.

**Public Communications Specialist**

1. **Develop communications plan/strategy**

* Position will be responsible for disseminating information via the departments approved communication vehicles in a timely manner.
  + Exceeding expectations may include creating original content that can be utilized to publicize work units accomplishments.

1. **Target Engagement**

* Monitor communication vehicles to ensure they are being actively utilized (i.e. web page hits) and adjust modes of communication to ensure target audiences are being reached.
  + Exceeding expectations may include developing a strategic plan for the work unit’s public communication strategy and staying abreast of technological changes.

1. **Organize and manage work unit events**

* This position is responsible for organizing, managing, and advertising all work unit events, including functions such as Research Days and retreats. This position will also inform the department of campus wide events that may be of interest.
  + Exceeding expectations may include proactively anticipating scheduling issues, undertaking efforts to increase attendance at events, and finding new avenues of advertisement to inform internal and external customers of events.

1. **Network/Liaison**

* This position is responsible for networking/liasioning with the School of Medicine Public Communications Office as well as other external offices to ensure departmental accomplishments are appropriately published in School/Campus wide communication vehicles (i.e. Vital Signs) or submitted as items such as press releases for external audiences.
  + Exceeding expectations may include building relationships with these external offices and working to develop strategic communication strategies consistent with the University’s best practices.

1. **Create/Manage Contact Lists**

* Create and manage departmental lists, such as listservs and alumni lists, to ensure new employees/students are receiving departmental communications and departing employees no longer receive communications that are no longer applicable to them.
  + Exceeding expectations may include developing a tracking method for keeping up with departmental alumni to ensure they are kept abreast of changes in the department.

**Research**

1. **EHS/IACUC/DLAM Coordination**

* Ensure EHS Lab safety plan, floor plan and biological/chemical schedules are submitted and updated when necessary along with updated and current chemical list. Ensure radioactive material meets EHS log and storage requirements. Ensure that protocol amendments and renewals are submitted in a timely manner so that the protocol reflects addition/updated experiments, new/departed personnel, added/updated drugs, added/updated chemicals, and live animals in use. Ensures personnel on protocol are current with training and new employees are properly trained.
  + Exceeding expectation may include recognizing when laboratory SOPs are no longer applicable and adapting processes to correct deficiencies.

1. **Lab Management**

* Order supplies to ensure laboratory needs are always met, ensure cleanliness of lab, and ensuring lab members have everything they need to accomplish experiments.
  + Exceeding expectations may include keeping an active inventory, anticipating lab needs, and finding ways to save money.

1. **Practicing Safety in the Lab**

* Ensuring appropriate PPE is always available for the lab and ensuring that hazards that pose risks are appropriately noted and corrected.
  + Exceeding this expectation may include identifying additional safety risks and proposing risk mitigations as well as educating others about lab safety.

1. **Animal Care**

* Ensure animal welfare compliance requirements for the lab are being met.
  + Exceeding this expectation may include thinking about the big picture of the lab’s animal compliance requirements and taking steps to reduce the possibility of infractions.

1. **Maintenance of Equipment**

* Ensure lab equipment is in good working order. Position will also coordinate with service personnel to ensure routine and as-needed maintenance of equipment is accomplished.
  + Exceeding this expectation may include troubleshooting problems without calling expensive maintenance personnel, and proactively evaluating equipment to anticipate when replacements will be needed so they may be appropriately budgeted for.

1. **Data Collection**

* Independently and effectively follow protocols to provide accurate and effective data collection.
  + Exceeding this expectation may include proposing new experiments based on observations to facilitate the possibility of new avenues of research.

**Social/Clinical Research**

1. **Intervention Techniques**

* This position will stay aware of the intervention techniques required for their position while maintaining any appropriate trainings and or licensures as required.
  + Exceeding this expectation may include blending intervention techniques, at times if necessary, to enhance data. In addition, it would be beneficial for this position to stay abreast of any regulation changes that could impact areas of study.

1. **Data Integrity**

* This position will ensure data their position handles is entered accurately and is accounted for in an appropriate manner. Position will ensure data storage follows all regulatory requirements.
  + Exceeding this expectation may include analyzing data to recognize trends and/or reviewing others’ data to find new ways of research.

1. **Regulatory Requirements**

* Ensure all regulatory requirements required by position are being met and human subjects are aware of all regulatory requirements.
  + Exceeding this expectation may include identifying future changes and adapting plans to meet these changing requirements. In addition, handling special situations with care and expertise would be something that is valued.

1. **Participant Recruitment/Screening**

* Work to recruit and screen new study participants. Position will build a network from a variety of sources to recruit new subjects and evaluate these subjects against the study requirements to ensure proper participants are selected. Study participants may be from different cultures/backgrounds so it is expected that this position will build an atmosphere of trust with these participants.
  + Exceeding this expectation may include building a pipeline of subjects to ensure a variety of subjects are always available for study.

1. **Data Collection**

* Assist research staff with the preparation of data, grant development, and literature searches/reviews.
  + Exceeding this expectation may include writing your own research articles and developing and writing your own research.

**Human Services**

1. **Client Supervision**

* This position is responsible for assisting clients to meet their needs (educational, socialization, family life, recreational, nutritional, etc.) while ensuring a nurturing, caring, safe, and supportive environment.
  + Exceeding expectations may include building relationships with clients to anticipate changing/future needs.

2. **Communications**

* This position is responsible for interacting with other agencies serving the clients and collaborating with the client’s work supervisor to ensure the relationships between all involved parties remain positive.
  + Exceeding expectations may include building relationships with agencies that are frequently interacted with to maximize potential resources.

3. **Curriculum Development**

* This position will develop, maintain, and implement curriculum areas for clients and goals focusing on the improvement of client skills within the assigned areas.
  + Exceeding expectations may include anticipating future changes that may occur and adapting curriculum/goals to reflect these changes.

1. **Assessment of Client Skills**

* This position is responsible for the assessment and documentation of client’s skills and behaviors in areas such as independence, self-care, communication, social leisure, and vocal and general behaviors to be used in training purposes for both the client and professionals interacting with the client.
  + Exceeding expectations may include leveraging professional knowledge to anticipate client needs while performing assessments and proactively working to develop plans for client.

1. **Documentation**

* This position will ensure timely completion of required documentation to support services that clients require. It is important to understand that these documents must meet the requirements of the agencies that they will be submitted to, and that everything will be submitted by any applicable deadlines.
  + Exceeding expectations may include proactively working to complete all required documentation well before established deadlines to ensure any problems encountered can be appropriately handled before deadlines.

**Information Technology**

1. **Maintenance/Improvement of Systems**

* Maintain a reliable information technology infrastructure, enabling innovative uses of technology for educational excellence. Provide adequate network bandwidth both on campus and to the Internet, and expand University capabilities using technology, including multimedia desktop technologies and audio visual tools.
  + Exceeding expectations could be when IT professionals work with clients to develop an understanding of the client’s specific needs for University systems, and provide individualized training.

1. **Customer Access to Technology**

* Improve and enhance access to online information resources required to effectively accomplish the University’s goals and objectives. Expand remote access to University information and data resources. Develop processes and procedures to support more effective communication with clients.
  + Exceeding expectations would be creating multiple online resources to assist clients with use of software.

1. **Security and Availability**

* Maintain a secure campus information technology environment, ensuring the confidentiality, integrity, and availability of critical information and systems. Ensure secure and effective access to technology resources through the use of authentication and identity management technologies. Monitor and protect the network from threats posed by malicious entities located inside and outside the University.
  + While there should always be a secure environment, exceeding expectations would occur when clients, through education and coaching, have a strong understanding of potential threats and make IT professionals aware as necessary.

1. **Timely and Accurate Data Submission**

* Ensure tasks and projects are completed within the established timeframe. Ensure information entered into University systems is complete, accurate, and in-line with established practices.
  + Exceeding expectations occurs when data is entered prior to established deadlines and individual assists with other projects.

1. **Enhance Teaching and Learning**

* Provide an information technology environment that fosters excellence in teaching and learning. Support creation of web-based communities for students and faculty. Continue to evaluate new course delivery technologies. Work with faculty, staff, and students to identify, develop, and implement needed programs to meet the University’s needs.
  + Exceeding expectations would be anticipating the needs of clients, and helping implement processes before concerns or needs arise.

1. **Increase Knowledge of Latest Technologies/Trends**

* Attend a minimum of three classes over the span of the upcoming year in fields that are beneficial to the Department’s/University’s needs. Research technologies/trends in the industry and ensure you are up-to-date on the latest information.
  + Exceeding expectations would be attending five classes or more in areas that are beneficial to the Department’s/University’s needs.

**Training**

1. **Create Quality**

* Create training programs that are valued and needed within the University. Through surveys or interaction with clients, determine what is needed or helpful to departments within the University.
  + Exceeding expectations occurs when 90% of attendees view the training session as beneficial to them or their department.

1. **Time Management**

* Prepare a timeline for the creation of each training and outline each step of the planning process. Have a clear understanding of departmental resources, and monitor the timeline of the training session and ensure all goals are met.
  + Exceeding expectations could be working ahead of schedule, reviewing the training session with peers, and then making adjustments as necessary prior to leading the training session.

1. **Training Follow-Up**

* Maintain a list of all employees who have attended training sessions. Follow-up with individuals that might be interested in upcoming trainings held by your group. Work to have employees attend follow-up training sessions in related, or unrelated, areas.
  + Exceeding expectations may include following up with specific individuals when encountering information/learning materials that would be helpful to that individual’s goals.

1. **Increase Visibility**

* Increase the number of people who visit the training website by 10% before the end of the fiscal year, and increase the number of enrolled trainees by 5% before the end of the fiscal year.
  + Exceeding expectations would show a significant increase in training demand, resulting in a 10% increase in enrolled trainees.

1. **Assess and Address Deficiencies**

* Over the next year, obtain an understanding of where employees and the organization have deficiencies. Create training sessions to tailor to the needs of the organization and individuals. If courses are already in place, adjust the instructional material to reflect the latest information.
  + Exceeding expectations could be understanding the deficiencies and developing two courses to help address the respective deficiencies within the fiscal year.

1. **Stay in Scope**

* Ensure training represents the original scope/plan that was designed during the beginning phases. While scope can change based on stakeholders, monitor and track potential adjustments, and prevent items that can impact the project’s scope.
  + Exceeding expectations could be when the project meets all of the initial goals that are established prior to beginning the project.

**Human Resources**

1. **Customer Service, Communication**

* Promptly address all inquiries within one business day. Follow through on all commitments, and maintain relevant communications with customers until task completion.
  + Exceeding expectations would be anticipating customer needs, such that concerns are addressed proactively before the customer even needs to ask a question. HR Representatives must ask probing questions is critical in this process to ensure there is a thorough understanding by all concerned so that the proper course of action is taken.

1. **ConnectCarolina HR/Payroll Proficiency**

* Limit the number of recycled, resubmitted, and denied ConnectCarolina actions to 10% due to user error. Have all actions completed prior to the effective date, and ensure comments accurately reflect the purpose of the action.
  + Exceeding expectations is when less than 5% of actions need resubmission due to user error.

1. **Successfully Implement Performance Management Program**

* Ensure all staff within the unit understand the Performance Management changes by the end of October 2016, and ensure updated Performance Plans are submitted prior to the end of October 2016. Meet with all managers and ensure there is a clear understanding of the process moving forward. Review with managers in the spring of 2017 before the Performance Cycle comes to an end.
  + Exceeding expectations could be scheduling meetings with managers and helping each write Individual Goals, in preparation for the new Performance Management program or by conducting departmental training sessions.

1. **Communicating and Establishing Effective Relationships**

* Knowledge and application of communication techniques and relationship building skills that result in the ability to work with a variety of individuals and groups in a constructive and collaborative manner. Increase proficiency in communicating, and build relationships both within and outside the unit.
  + Exceeding expectations could be when someone has established a multitude of strong relationships outside of the department, such that they are able to point clients into the appropriate direction when it’s not HR-related.

1. **Compliance, Understanding of University Policy**

* Knowledge of University practices, behaviors, applicable laws, rules, and regulations. Ability to demonstrate ethical and compliant behavior. Increase proficiency in University policies and procedures.
  + Exceeding expectations could be when an HR professional is able to reference the majority of policies and procedures without having to refer to written policy.

1. **Compliance with Processing Pre-employment Documents**

* I-9s and criminal background checks must be completed according to federal and University policy and by established deadlines with an error/late rate of less than 5%.
  + Exceeding expectations is when the error/late rate is 1% or less. This can be verified by use of the OHR monthly audit reports.

1. **Time Information Management**

* Ensure employee timecards are complete, accurate and comply with University policy and federal law. Timecards are to be signed off at the appropriate time to meet established deadlines.
  + Exceeding expectations could be when internal processes are developed to help department employees and supervisors understand the importance of accurate and timely submission/approval of timecards. It could also be when training sessions are held periodically during the performance cycle for employees and supervisors.

1. **Employee Pay**

* Ensure employees are paid accurately and on time by submitting appropriate and complete transactions, with required supporting documentation, no later than the established deadlines.
  + Exceeding expectations could be when there are no overpayments during the performance cycle.

1. **Employee Relations**

* Perform at least three customized presentations (30‐60 min) for supervisors and/or employees during the performance cycle. Presentations should be based on department needs and/or from direct experiences with the department in order to increase visibility, awareness, and understanding of employee relations policy and best practices. The three presentations may have the same content. Presentation feedback will be received from Department/School staff, anecdotal information from participants, and direct observation of presentations.
  + Exceeding expectations may include presenting additional, different programs (different topics/audiences) within this cycle; create significant, new training materials; consistently and skillfully field difficult questions or managing argumentative participants in order to keep the presentation progressing; and/or strategic follow‐ups with participants to address specific concerns.

**Program Management**

1. **Inspiring Others**

* Encourage and inspire others to attain their goals and reach their potential. Involve all team members in planning, and ensure each individual feels valued. Reward team members, and show appreciation for good work.
  + Exceeding expectations would occur when team members show a 5% increase in employee engagement, via annual departmental engagement survey.

1. **Work within Departmental Budgetary Restraints**

* Create a realistic budget for the fiscal year, and ensure all potential costs are captured. Track any potential changes, and if there is over-spending in a certain area, ensure that is minimized and reduce costs in other areas.
  + Exceeding expectations would be finishing the fiscal year with a profit, while providing the same quality.

1. **Program Administration**

* Establish clearly-defined expectations and easy-to-understand timelines and desired outcomes. Ability to monitor delegated assignments or projects.
  + Exceeding expectations could be implementing an internal program or process to help identify where tasks stand and who should oversee specific duties.

1. **Departmental Records Administration**

* Create better record-keeping practices within the department. Organize files and establish a process that allows for a more efficient tracking of departmental documents. File all departmental documents by Friday each week so that records are orderly and accessible, resulting in zero backlog.
  + Exceeding expectations could be fully transitioning to an electronic record-keeping system by the end of the performance cycle.

**Administrative Support**

1. **Scheduling Meetings/Events**

* Schedule meetings/events with 90% accuracy, according to the priority established by the requestor, allowing for travel time between scheduled events when appropriate. Maintain contact info for individuals who are frequently invited to meetings and contacts/resources frequently used for event planning. Prepare materials that need to be taken to the meetings in advance.
  + Exceeding expectations occurs when there is 100% accuracy and the employee becomes a known point-of-contact for scheduling to those both internal and external to the department.

1. **Curriculum Vitae Resource**

* Update faculty CV formatting as needed, and no less than annually, ensuring formatting is compliant with current SOM/UNC standardized format.
  + Exceeding expectations could be when the employee creates a tracking system that is set up to prompt meetings with faculty members regarding their CVs.

1. **Phone Call Response Rate**

* Ensure phone calls are answered/returned within two business days. Greet visitors/guests in a timely, courteous manner.
  + Exceeding expectations occurs when 100% of phone calls are returned within one business days.

1. **Event Coordination and Budget Oversight**

* Works with event sponsor to create and adhere to event budget. Works with event sponsor to develop and follow event master plan and all necessary details are included in the master plan. Ensures invitations are sent timely and monitors responses. Works with site manager and caterer to ensure location and meal planning are adequate for the headcount and event theme. Adhere to University policy regarding serving alcohol.
  + Exceeding expectations could occur when all tasks are completed two business days prior to the established deadline.

1. **Response to Requests**

* Responds to email, echart, and phone requests within two business days. Communicates with clinical administrative staff to schedule, cancel, block, and change faculty templates with two-week notices. Works with faculty to help facilitate timely responses to patient requests. Follows protocol regarding triaging emergent/urgent clinical situations to ensure patients are directed to the appropriate clinical staff and faculty within the defined timeline.
  + Exceeding expectations occurs when 100% of emails are responded to within one business day. Regardless of whether a concrete answer is available within one business day, the employee ensures that the client understands that he/she is working toward a solution.

1. **Program Knowledge and Familiarity**

* Using program knowledge and familiarity with faculty member’s writing style and voice, draft correspondence on behalf of faculty. Correspondence drafts should be 75% accurate/complete, requiring only minimal edits by the faculty member.
  + Exceeding expectations occurs when correspondence drafts are 90% accurate/complete requiring incredibly minimal edits.

1. **Mail Coordination**

* Retrieve mail daily based on University mail delivery times. Correspondence should be sorted, date stamped, and prioritized based on urgency. Urgent matters should be escalated to the attention of faculty and communicated in a clear manner that includes reason for urgency and deadlines involved.
  + Exceeding expectations could occur when the mail is collected twice a day, and consistently at the same times each day.

1. **Timecard Review and Approval**

* Work time is to be entered daily for non-exempt employees. Review timecard for accuracy on the Monday following the pay period end date, editing as needed. Enter any leave time taken and approve timecard prior to the department and/or University deadline.
  + Exceeding expectations occurs when employee approves timecard by noon the Monday following a pay period 100% of the time during the performance review period.

1. **Departmental Records Administration**

* Create better record-keeping practices within the department. Organize files and establish a process that allows for a more efficient tracking of departmental documents. File all departmental documents by Friday each week so that records are orderly and accessible, resulting in zero backlog.
  + Exceeding expectations could be fully transitioning to an electronic record-keeping system by the end of the performance cycle.

1. **Reviewing Supplies Inventory, Ordering Supplies**

* Establish a biweekly/monthly schedule for ordering supplies; ensure an adequate, but not overstocked, supply is on hand.
  + Exceeding expectations could be when supplies are always available to faculty and staff because of the diligent review provided by this position; or when a tracking system is created to manage supply inventory.

1. **Facility Repair and Maintenance Needs**

* Serve as point person for facility repair and maintenance needs. Submit work order requests immediately for building repair and maintenance for urgent repairs or within 24 hours of notification for general repairs. Maintain a work order log and provide follow up for completed orders. Investigate unresolved issues and facilitate solutions. Maintain and update space usage quarterly. Assist with space allocation and equipment support for new hires.
  + Exceeding expectations could occur when 100% of work order requests are submitted within four business hours.

1. **Parking Coordination**

* Manage department parking permits, including faculty and staff annual registration, service, and visitor passes as well as off-site parking. Attend annual parking coordinator meeting. Complete annual enrollment to ensure faculty and staff have adequate parking assignments for current and upcoming year by University deadline. Analyze usage and recommend appropriate allotment changes based on need. Distribute parking permits to faculty and staff before start of new parking year. Track service and visitor pass usage and communicate with users when passes are not returned after 24 hours. Keep a log to track and maintain service and visitor usage and users.
  + Exceeding expectations could occur when the Parking Coordinator works directly with all employees who don’t receive a parking pass, and provides detailed instructions on alternate options and routes.

1. **Recruitment and Onboarding Assistance**

* In collaboration with residency program director, develop schedule for recruitment and onboarding. Throughout the year, meet requisite deadlines with quality work deliverables at every stage.
  + Exceeding expectations could occur when individual consistently provides deliverables two business days ahead of the established deadline.

1. **Preparing Agendas and Minutes**

* Prepares agendas, takes notes, and prepares minutes for meetings. Minutes are prepared and distributed within one week of the meeting.
  + Exceeding expectations occurs when minutes are provided to attendees and necessary parties within two business days.

1. **Website Maintenance**

* Maintain and update website content and presence quarterly. Provide ongoing review for relevance and accuracy.
  + Exceeding expectations could occur when there are zero errors/misspellings on the department website.

**Accounting/Business Manager Functions**

1. **Account Reconciliation**

* Accounts are reconciled by 20th of the month, ensuring that all realized expenses and revenues are accurate, accrued to the correct Chartfield string, and that all expected expenses and revenues have in fact been realized.
  + Exceeding expectations could occur when accounts are reconciled by the 15th of the month 80% of the time.

1. **Transactional Accounting Functions**

* Consistently performs transactional accounting functions in accurate and timely manner. Vouchers entered with correct Chartfield string and within 72 hours 90% of the time. Deposits completed with appropriate documentation within 24 hours.
  + Exceeding expectations occurs when 95% of vouchers are entered with the appropriate Chartfield string within two business days.

1. **Budget Development**

* Works with leadership to develop departmental budget by the required deadline. Monitors revenue collection and expenses to ensure budget goals are met. Prepares and submits monthly report by 20th of month, tracking revenue and expenses to budget, with particular attention, explanation, and plan of action provided for all budget variances greater than 10%.
  + Exceeding expectations could be when the respective budget is developed/completed two days prior to the required deadline. This could also occur when the monthly report is submitted by the 15th of the month.

1. **Financial Performance Analysis**

* By 20th of month, complete analysis of prior month's financial performance, ensuring that all processed transactions were posted and that posted transactions are accurate. Corrective action taken for any errors. Summary of variances to leadership. Prepares analysis of complex data and generates meaningful report for leadership which includes brief/complete/accurate summary and visual representations as appropriate.
  + Exceeding expectations occurs when the complete analysis is provided by the 15th of the month 75% of the time during the review period.

1. **Accrual of Accounts Receivable and Payable**

* Complete and accurate accrual of accounts receivable and payable. Invoicing and payment is in compliance with contract terms. Invoices processed by 10th of the month.
  + Exceeding expectations occurs when invoices are processed by the 5th of the month 80% of the time during the review period.

1. **Financial Approvals/Oversight & HR Approvals/Oversight**

* Review financial transactions in worklist daily and approve or reject as appropriate. Act as financial steward for the department, ensuring transactions align with policy, and use appropriate Chartfield strings. Review personnel actions on a timely basis and approve or recycle as appropriate, ensuring funding policies are being followed where necessary. Ensure worklist is emptied daily so as not to hinder school-wide progress.
  + Exceeding expectations occurs when all actions on the worklist are reviewed and approved/rejected before the end of the business day.

1. **TimeTrex Reports**

* Ensure all submitted TimeTrex reports are reconciled and approved within 14 days of the identified week. Reports with errors are returned to faculty, staff, or APP with detailed explanation for correction. Communicate with Roberta Byrd to ensure new faculty, staff, and APPs are added/removed to/from the TimeTrex system within two weeks of hire/termination. 90% of possible faculty and staff reports are submitted by annual deadline. 90% of possible APP reports are submitted by annual deadline.
  + Exceeding expectations occurs when TimeTrex reports are reconciled and approved within 10 days of the identified week. Moreover, expectations are exceeded when employees are added/removed to/from the TimeTrex system within two business days of hire/termination, and then 100% of faculty/staff reports and APP reports are submitted by the annual deadline.

1. **ECRT Review**

* Review 100% of ECRT report to ensure accuracy of payroll and sponsored funding by University pre-review deadline. Ensure 100% of ECRT reports are submitted, reconciled, and approved by University deadline. Work with faculty and staff to answer questions and resolve potential issues.
  + Exceeding expectations occurs when the financial representative not only meets the 100% expectation, but also when the financial representative becomes a trusted and valued resource for faculty/staff as it relates to ECRT.

1. **Review of EPAP Submissions**

* Review EPAP submissions for potential conflict of interest and compliance with University, SOM, and Department policies within five business days. This requires timely communication of questions or concerns regarding the submission with faculty member, Division Administrator, and Department Chair.
  + Exceeding expectations occurs when EPAP submissions are reviewed within two business days.

1. **Develop Standard Operating Procedures**

* Develops standard operating procedures for stated business functions that are compliant with University and regulatory requirements. Documentation is accessible, easily followed and may include screenshots and videos.
  + Exceeding expectations could be when standard operational procedures are provided via electronic materials and also have instructional materials via the departmental website.

1. **Performance Plans and Goals**

* Performance plans and goals are written and discussed with University employees by April 30th and Healthcare System employees by September 30th. Employees receive ongoing and timely feedback regarding work performance. When a performance issue is identified, employee is counseled within five days, with documented plan for remediation. Significant contributions are consistently recognized. Meetings, which allow open exchange of ideas and information, are held with individual employees regularly. Work collaboratively with the employee, to identify and prioritize opportunities for further development of skills.
  + Exceeding expectations occurs when completed Performance Plans are submitted by April 15th, and when Healthcare reviews are submitted by Sept. 15th. Expectations also are exceeded when counseling sessions occur the same day of an identified performance issue.

**Social Work**

1. **Completing Assessments**

* Complete clinical assessments and provide case management services to children and adults diagnosed with mental illness or substance use disorders. Document clinical encounters within three business days.
  + Exceeding expectations occurs when 90% of clinical encounters are documented within two business days.

1. **Monitoring Progress Completing Assessments**

* Monitor patient’s progress in treatment and provide support services, as needed.
  + Exceeding expectations when 100% of patient inquiries are responded to within one business day.

1. **Providing Referral Information**

* Provide referral information and recommendations for treatment to the appropriate resources.
  + Exceeding expectations occurs when referral information and recommendations are provided to the patient either during the meeting, or within one business day.

1. **Communication, Customer Service**

* Promptly address all inquiries within one business day. Follow through on all commitments, and maintain relevant communications with customers until task completion.
  + Exceeding expectations would be anticipating customer’s needs and addressing those concerns before questions arise.

1. **Email Response Rate**

* Responds to all email, echart, and telephone consumer requests within one business days. Communicating and following up with the appropriate parties as necessary.
  + Exceeding expectations occurs when 100% of all communication mediums are responded to within one business day. Regardless of whether a concrete answer is available within one business day, the employee ensures the client that he/she is working toward a solution.