

CRDU Employee Position Descriptions

Mgt Staff

MDHS-PERS 211
 SPB FORM 800-3
 Revised: May 1, 2000

MS STATE PERSONNEL BOARD PERFORMANCE APPRAISAL REVIEW REPORT

Page 1 of 3

Employee's Signature: _____

Date: _____

Section 2. Duties/Performance /Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight X Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
<p><i>I. Provides supervision and technical support to CRDU staff.</i> <i>Ensures that support staff have and maintain a current Vol. VI and Pay Connection manual. Delegate and make work assignments according to staff's knowledge and expertise. Monitor attendance and ensure that staff are on task at designated times or on approved leave. Take corrective disciplinary action when necessary with little supervision. Conduct a staff meeting once a month with staff to advise of current program status and revision of any policies and procedures, followed up by written summary of meeting to staff and Program Operations Director within two (2) working days after meeting was held.</i></p>	2		_____ x _____ = _____
<p><i>II. Conduct Performance Appraisal Reviews with subordinate staff in accordance with all State Personnel Board applicable guidelines.</i> <i>Hold formal review and feedback sessions with staff under direct supervision with no more than one rating being overdue during this rating period. Reports any deviations to Program Operations Director.</i></p>	2		_____ x _____ = _____
<p><i>III. Review fiscal functions to ensure proper accounting practices are followed.</i> <i>Ensuring daily bank deposits are made daily with no more than two (2) instances of this not occurring during the rating period. Report any variances of findings to Program Operations Director.</i></p>	2		_____ x _____ = _____

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Date:

Section 2. Duties/Performance/Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight X Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
<p>IV. Maintain separation of cash handling duties as required under Federal Regulations. Create and post a rotating task schedule to ensure that all fiscal functions are performed by different staff persons with no more than one (1) instance of non-compliance if within the control of the employee. Duties should be assigned as follows:</p> <ol style="list-style-type: none"> 1. Employee to intake/count/create receipts 2. Employee to re-count/verify and give receipts to scanner. 3. Employee to scan receipts into Pay Connection System. 4. Employee to accept cash and create deposit slips. 5. Employee to verify cash payment and amount in Pay Connection. 6. Employee to post payment(s) to client's case. <p>Report any variances of findings to Program Operations Director.</p>	2		_____ x _____ = _____
<p>V. Monitor staff's work to ensure payments are receipted correctly. Review staff work to ensure payments are receipted timely and correctly according to federal regulations. There should be no more than one (1) failed quarterly audit during the rating period. Provide a weekly CRDU production report.</p>	2		_____ x _____ = _____
<p>VI. Perform special duties/assignments as needed. Special duties/assignments are performed within established deadlines/time frames with no more than one (1) instance of deadlines/time frames not being met if within the control of the employee. Notify Program Operations Director of any hindrances to meeting established deadlines/time frames, if any.</p>	1		_____ x _____ = _____

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<p><i>VII. Maintain a current Office Property and Equipment log, form MDHS-PROP 114 E.</i></p> <p><i>Property log should be visibly posted within work area with no more than one (1) instance of non-compliance during the rating period.</i></p>	1		<p>_____ x _____ = _____</p>
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_____ Total Weight

_____ Total Points

Total Points : Total Weight = Summary Rating

_____ : _____ = _____

MS STATE PERSONNEL BOARD
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Supervisor

Employee's Signature: _____

Date: _____

Section 2. Duties/Performance /Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight X Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
<p><i>I. Provides supervision and technical support to CRDU staff and reports to Program Operations Director. Must conduct a staff meeting once a month with staff to advise of current program status. Must provide a weekly written CRDU status report and monthly staff meeting to Program Operations Director. Must update all program events monthly, training, and telephone calls status.</i></p>	2		_____ x _____ = _____
<p><i>II. Must maintain employee's personnel records and complete employee's performance appraisal reviews within all applicable deadlines. Holds formal review and feedback sessions with staff under direct supervision. With no more than one rating being overdue during this rating period. Reports any deviations to Program Operations Director. Ensures all supervising staff follow SPB Standards set forth in the PAR Handbook.</i></p>	2		_____ x _____ = _____
<p><i>III. Review fiscal functions to ensure proper accounting practices are followed. Establishes procedures for handling payments and deposits. Ensures all supporting staff are aware of current METSS and Pay Connection regulations. Ensures daily bank deposits are deposited daily in the bank. Ensures that support staff have and maintain a current Vol. VI and Pay Connection manual. Ensure separation of cash handling duties required under Federal regulations. Report any variances of findings to Program Operations Director.</i></p>	2		_____ x _____ = _____

_____ Total Weight

_____ Total Points

Total Points : Total Weight = Summary Rating

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Employee's Signature: _____

Date: _____

<i>Section 2. Duties/Performance/Standards</i>	<i>WT</i>	<i>Section 5. Accomplishments/ Areas to Improve</i>	<i>Weight X Rating = Points (1 or 2) (1.0, 2.0 or 3.0)</i>
<i>IV. Administers DCSE policies and procedures to ensure staff compliance. Ensures compliance requirements of Vol. VI. Ensures staff complies with agency policy and procedures. Ensure supporting staff perform duties at an acceptable performance rate with minium number of errors.</i>	2		_____ x _____ = _____
<i>V. Performs all duties in accordance with MDHS Administrative requirements and special assignments which are necessary to achieve the agency's goals. Ensures staff are at work stations and designated duties as required. Reports deviations, delinquencies and take appropriate steps for corrective actions. Ensures Program Operations Director is apprized at all times.</i>	2		_____ x _____ = _____
<i>VI. Ensures that employees maintain a current Office Property and Equipment log, form MDHS-PROP 114E, visibly posted in office or work area, and that all assigned property is accounted for.</i>	2		_____ x _____ = _____

_____ Total Weight

_____ Total Points

Total Points : Total Weight = Summary Rating

_____ : _____ = _____

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 PERFORMANCE APPRAISAL REVIEW REPORT

QA

Employee's Signature: _____

Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
	1. AQAM must be done daily and all transactions coded "R" must be completed before the final upload. At least 80% of all AQAM coded "M" (multiple entries) must be completed before upload.	2		___ x ___ = ___
	2. All quality assurance codes related to the walk-in payment window must be resolved before the daily bank deposit is performed.	2		___ x ___ = ___
	3. At least 80% of all AQAM coded "I" (inactive order) must be completed before upload. The worker should document the case in METSS when problems arise in connection with this action.	2		___ x ___ = ___
	4. Performs all duties in accordance with administrative policies. Examples are punctuality, leave requests, time cards reports, current manual reports. Program policy and procedures are consistently followed. A good understanding of policy is routinely characterized by timeliness, accuracy, and quality of work.	1		___ x ___ = ___

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Employee's Signature: _____

Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
	5. . Communicates, cooperates, and coordinates with other staff, other MDHS Divisions, agencies, clients, and the general public. Accurate, clear and complete communication is provided as appropriate. Exhibits tact and discretion in all actions. Proper lines of communication are followed. Special assignments are willingly accepted and completed timely and accurately.	2		 ___ x ___ = ___
	6. Employee maintain a current office property and equipment log, form MDHS-PROP 144E, visibly posted in office or work area, and that all assigned property is accounted for according to agency policy.	2		 ___ x ___ = ___

_____ **TOTAL WEIGHT**

_____ **TOTAL POINTS**

Total Points - Total Weight = SUMMARY RATING

_____ ÷ _____ = _____

MS STATE PERSONNEL BOARD

PERFORMANCE APPRAISAL REVIEW REPORT

Checks

Employee's Signature: _____

Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight x Rating = Points <small>(1 or 2) (1.0, 2.0 or 3.0)</small>
	1. Runs calculator tapes to ensure accuracy and to verify that total number of checks is present with no more than one (1) error allowed during the appraisal period	2		___ x ___ = ___
	2. Runs two (2) calculator tapes which will be initialed on each batch by you with no exceptions	2		___ x ___ = ___
	3. Ensures check signatures and payee names are on the check with no more than one (1) instance of mistake/overlook during the appraisal period.	2		___ x ___ = ___
	4. Check transmittals to ensure that there were no checks left in or with the remittance documents.	2		___ x ___ = ___
	5. Ensure that unprocessed checks are locked up at the end of the day with no more than one (1) instance of checks not being locked up during the appraisal period.	2		___ x ___ = ___
	6. Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc. with no more than two (2) errors within the appraisal period.	2		___ x ___ = ___
	7. Employee completes and maintains current Property/Equipment Inventory Log (form MDHS - Prop 144E) displayed in a visible place in your office on or before July of each year.	1		___ x ___ = ___

_____ TOTAL WEIGHT

_____ TOTAL POINTS

Total Points - Total Weight = SUMMARY RATING

_____ ÷ _____ = _____

MS STATE PERSONNEL BOARD

PERFORMANCE APPRAISAL REVIEW REPORT

PENT

Employee's Signature: _____ Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
1.	Must accurately post a minimum of fifty (50) batches of payments in an eight (8) hour workday.	2		___ x ___ = ___
2.	Must accurately post payments to the correct case with no more than one (1) error in a month.	2		___ x ___ = ___
3.	Must accurately verify payment instruments with no more than one (1) error in a month	2		___ x ___ = ___
4.	Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc. with no more than two (2) errors within the appraisal period.	2		___ x ___ = ___
5.	Employee completes and maintains current Property/Equipment Inventory Log (form MDHS – Prop 144E) displayed in a visible place in your office on or before July of each year.	1		___ x ___ = ___

_____ TOTAL WEIGHT _____ TOTAL POINTS
 Total Points - Total Weight = SUMMARY RATING
 _____ + _____ = _____

FIVE

Employee Name. _____

Section 2.	Duties / Performance Standards	WT	Accomplishments / Areas to Improve Section 5.	Weight x Rating = Points (1 or 2) (1.0 2.0 or 3.0)
1.	Must accurately verify a minimum of eighty (80) batches in an eight (8) hour workday by ensuring on the check routing number, account number, check number and date, check amount, signature, and payment is made payable to MDHS	2		___ x ___ = ___
2.	Employee verifies that all systems populated information is accurate with no more than one (1) error in a month.	2		___ x ___ = ___
3.	Employee verifies and accurately ensures the correct MICR profile is assigned to the payment with no more than one (1) error per month. Review SHEF record that already exists relating to any financial instrument data. Update the SHEF record if needed and save the updates on SHEF	2		___ x ___ = ___
4.	Employee posts payments accurately with no more than one (1) in a month	2		___ x ___ = ___
5.	Employee performs other duties as assigned such scanning, reporting, prepping, special projects, Q&A, Research, Exceptions.	1		___ x ___ = ___
6.	Employee maintains current property / equipment inventory log (Form MDHS – Prop 144E) On or before July of each year by displaying it in a visible place in your office.	1		___ x ___ = ___

_____ Total Weight

Total Points - Total Weight = **SUMMARY RATING**

_____ ÷ _____ = _____

Deposits

PERFORMANCE APPRAISAL REVIEW REPORT

Revised: May 1, 2000

Employee's Signature: _____ Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
	1. Accurately completes daily Deposit Tickets/Slips timely with no more than one (1) instance of making an error on the amount.	2		___ x ___ = ___
	2. Ensure that you inform your immediate supervisor and Program Administrator Senior when the total amount collected is at least \$960,000.00 by 3:30 each day, with no more than one (1) occasion you failed to inform your supervisor.	2		___ x ___ = ___
	3. Accurately completes Deposit Tickets/Slips for replacement and Trustmark reimbursement checks with no more than one (1) error during the appraisal period (copies of the transactions must be kept in a file for audit).	2		___ x ___ = ___
	4. Verifies appropriate endorsement on the back of a check(s) and ensures check is signed; the numerical amount is the same as the written amount with no more than one (1) mistake during the appraisal period.	2		___ x ___ = ___
	5. Must report any unusual fiscal discrepancy or issue to immediate supervisor and program administrator senior on the day of occurrence.	2		___ x ___ = ___
	6. Performs all duties in accordance with administrative policies with no more than two (2) errors made during the appraisal period. Examples are punctuality, submit leave on time i.e. complete and submit leave form before it is taken, complete and submit time card, etc.	2		___ x ___ = ___
	7. Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc. with no more than two (2) errors within the appraisal period.	2		___ x ___ = ___

Employee's Signature: _____ Date: _____

8. Employee completes and maintains current Property/Equipment Inventory Log (form MDHS - Prop 144E) and displayed in a visible place in your office on or before July of each year.	1		___ x ___ = ___
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_____ TOTAL WEIGHT _____ TOTAL POINTS
Total Points - Total Weight = **SUMMARY RATING**
_____ ÷ _____ = _____

MS STATE PERSONNEL BOARD PERFORMANCE APPRAISAL REVIEW REPORT

Employee's Signature: _____ Date: _____

Section 2.	Duties / Performance Standards	WT	Section 5. Accomplishments / Areas To Improve	Weight (1 or 2)	x	Rating (1.0, 2.0 or 3.0)	=	Points
1.	Scans payments instrument(s) (checks) with correct remittance documents(s) with no more than one error (1) made during the evaluation period.	2		___	x	___	=	___
2.	Ensures no check is found on or around Opex machine assigned to the operator at the close of business day or at the end of your work schedule, during the evaluation period.	2		___	x	___	=	___
3.	Ensures no check is found/ mixed with the remittance documents after scanning, during the evaluation period.	2		___	x	___	=	___
4.	Ensures machine area is kept clean, and trash container kept clean at the end of each business day with no more than one (1) time trash is found not removed at the end of business day, during the evaluation period.	2		___	x	___	=	___
5.	Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc. with no more than two (2) errors within the appraisal period.	2		___	x	___	=	___
6.	Employee completes and maintains current Property/Equipment Inventory Log (form MDHS - Prop 144E) displayed in a visible place in your office on or before July of each year.	1		___	x	___	=	___

_____ TOTAL WEIGHT _____ TOTAL POINTS
 Total Points - Total Weight = SUMMARY RATING
 _____ + _____ = _____

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Section 2. Duties/Performance Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
4. All currency should be marked with a counterfeit marker to ensure that all bills are genuine. No counterfeit bills should ever be accepted within the rating period. The worker must ensure payer signs the receipt that is being retained by crdu.	2		_____ X _____ = _____
5. Ensure no "voids" occur in keying the wrong ssn, amount paid, etc., with no more than one (1) error /void during the appraisal period.	2		_____ X _____ = _____
6. Count the cash box daily with other designated staff to ensure receipts match with the actual cash/checks collected with no mistakes during the appraisal period.	2		_____ X _____ = _____

_____ TOTAL WEIGHT

_____ TOTAL POINTS

TOTAL POINTS ÷ TOTAL WEIGHT = SUMMARY RATING

_____ ÷ _____ = _____

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Section 2. Duties/Performance Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
7. Ensures the window receipts and Financial instruments and replacement documents (FIRD) are given to scanner and cash/checks are given to the staff person responsible for making deposits with no discrepancy or complaint during the appraisal period.	2		_____ X _____ = _____
8. Ensure payments received daily after the cash box has been closed out are removed from the box and placed in the locked bank bag and kept inside the fire proof file cabinet and secured daily Also, that no money is left in the cash box overnight.	2		_____ X _____ = _____
9. Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc with no more than two (2) errors within the appraisal period.	2		_____ X _____ = _____

_____ TOTAL WEIGHT

_____ TOTAL POINTS

TOTAL POINTS ÷ TOTAL WEIGHT = SUMMARY RATING

_____ ÷ _____ = _____

MS STATE PERSONNEL BOARD
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Section 2. Duties/Performance Standards	WT	Section 5. Accomplishments/ Areas to Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
10. Employee completes and maintains a current property/Equipment Inventory Log (form MDHS-prop 144E) displayed in a visible place in your office on or before July of each year.	1		_____ X _____ = _____
			_____ X _____ = _____
			_____ X _____ = _____

_____ TOTAL WEIGHT

_____ TOTAL POINTS

TOTAL POINTS ÷ TOTAL WEIGHT = SUMMARY RATING

_____ ÷ _____ = _____

Section 2.	Duties / Performance Standards	WT	Section 5.	Accomplishments / Areas To Improve	Weight x Rating = Points (1 or 2) (1.0, 2.0 or 3.0)
	8. Perform other duties as assigned such as scanning, reports, prepping, training, special projects, QA, Research, EXCP, etc. with no more than two (2) errors found within the appraisal period.	2			_____ x _____ = _____
	9. Employee completes and maintains current Property/Equipment Inventory Log (form MDHS - Prop 144E) displayed in a visible place in your office on or before July of each year.	1			_____ x _____ = _____

_____ TOTAL WEIGHT
 Total Points - Total Weight = SUMMARY RATING
 _____ + _____ = _____