



Operations Career Progression Guide

as of March 2022



**CARING
TOGETHER**



TABLE OF CONTENTS

1. Introduction
2. Company Values
3. Competency Descriptions
4. Medical Specialist Skill Requirements
 - a. Job Knowledge
 - i. Medical Outreach Specialist
 - ii. Medical Fulfillment Specialist
 - iii. Medical Imaging Specialist
 - b. Resiliency
 - c. Results Driven
 - d. Problem Solving
 - e. Customer Focused
 - f. Communication
 - g. Professional Conduct
 - h. Team Engagement
5. Competency Development
6. Growth & Development Strategies
7. Next Steps
8. Appendix

INTRODUCTION



Do you aspire to grow and develop the necessary skills to support your advancement within Operations and the company overall? Then you have come to the right place! Welcome to the tool that will assist you in developing an action plan to support your career aspirations.

As a company that values our employees and their growth, this guide provides the expectations for each of the Medical Specialist roles within Operations. The career development planning process is closely aligned to our Performance Evaluation Process to ensure you stay on track in achieving your goals. This tool will enable you to identify the key skills needed to create your own personal career road map that supports your goals.

The guide is organized around eight core competencies that we consider integral to our business, mission, and company values. Each competency lists the required behaviors and characteristics to build and strengthen critical skills to support your advancement. Additionally, this guide provides training and learning experience options to help you develop the skills necessary to advance. The approaches offer flexibility based on the job or situation and are meant to be descriptive, not prescriptive, with options that promote dialogue between you and your manager.

For additional information about your potential career growth and developmental goals, please be sure to partner with your manager to create a plan that best supports your career goals.

Let this career guide assist you in building the road map for your learning journey. Set your sights high and take charge in achieving your career goals!



COMPANY VALUES

Our values guide who we are and how we work as a company. They are woven into all that we do to ensure patients get the critical care they need as soon as possible. These values can also be a guide to help you achieve your career goals at eHealth Technologies.



Integrity – We are an honest, ethical company with a deep commitment to safeguard the health information entrusted to us.



Customer care – We are passionate about the critically important work we do for our customers and their patients, driving us to exceed their expectations, needs, and timelines.



Our people – We share a responsibility to provide an honest, caring, encouraging, and inclusive environment based on mutual trust and respect for all who work here.



Results – We are innovative and embrace a culture of continuous improvement and faithfully meet all commitments to our fellow team members and the company.



Collaboration – Open and active communication guides the way we work. Differing viewpoints are encouraged. In the end, alignment and teamwork drives our success.

COMPETENCY CHART

Results Driven	Job Knowledge	Problem Solving	Customer Focused	Communication	Professional Conduct	Team engagement
Achieves =30-60-90 day performance metrics	Understands the expectations of position	Utilizes available resources and seeks help when needed	Delivers eHealth Experience to all customers	Asks questions and supports co-workers	Behaves in a friendly, respectful manner; has a positive attitude, is on time, is receptive of feedback and coaching; models company values	Is genuine and inclusive towards others
Consistently meets/ exceeds standards and goals	Able to support different client requests	Addresses problems and looks for solutions with an open mind	Consistently delivers eHealth experience to all customers	Shares information effectively to support co-workers	Consistently models Values & Professional behaviors	Is genuine and inclusive towards others
Able to meet standards in multiple areas	Effectively increases job responsibilities supporting functional area	Seeks to resolve problems with minimal direction; able to identify process efficiencies	Works to address escalated customer issues to maintain eHealth experience	Engages with colleagues in a clear and concise manner	Consistently Role Models	Influences team culture through leading by example
Strives to deliver results through themselves and others; meets/exceeds performance & quality goals	Has specialized knowledge of multiple processes & client account needs	Seeks to address and resolve root cause of problems; able to identify process efficiencies	Identifies and understands customer needs	Collaborates with partners and leaders to meet goals	Consistently Role Models	Drives an environment of trust and respect with leader support
Delivers results through themselves and others; meets/exceeds performance & quality goals	Able to apply specialized knowledge within & without functional area	Anticipates problems before they arise and works to create solutions; Identifies process efficiencies	Anticipates customer needs and concerns	Works to create a collaborative culture	Consistently Role Models	Drives an environment of trust and respect within functional area
Strives to deliver results through themselves and others; meets/exceeds performance & quality goals	Has specialized knowledge of multiple processes & client account needs	Seeks to address and resolve root cause of problems; able to identify process efficiencies	Identifies, anticipates, and understands customer needs	Collaborates with partners and leaders to meet goals	Consistently Role Models	Drives an environment of trust and respect with leader support
Delivers results through themselves and others	Able to apply specialized knowledge within functional area	Anticipates problems before they arise and works to create solutions; Identifies process efficiencies	Anticipates customer needs and concerns	Works to create a collaborative culture	Consistently Role Models	Drives an environment of trust and respect within functional area

COMPETENCY DESCRIPTIONS



Job Knowledge: Possesses, uses, and develops the functional knowledge required for the position. *See matrices for each Specialist role and the required job knowledge & experience expected for each grade level.*

Resilient: Able to recover quickly from difficult challenges or conditions. Remains positive and flexible when facing change. Responds quickly to new demands, priorities or changes in direction while remaining productive.

Results Driven: Conveys a sense of urgency and a commitment to one's work and drives issues and tasks to closure.

Problem Solving: Gathers and processes information efficiently and with an open mind, in order to make sound decisions.

Customer Focused: Understands and exceeds the expectations of internal and external customers.

Communication: Shares ideas and keep others informed by providing a clear message.

Professional Conduct: Treats everyone with respect, is a team player, maintains a positive outlook, is reliable, reports to work on time and consistently role models company values.

Team Engagement: Inspires others to take action by capitalizing on what motivates their performance.

Medical Outreach Specialist: Levels 1 - 5

Job Duties	Level 1	Level 2	Level 3	Level 4	Assistant Manager
Type of Account	Transplant , Dentist, Mental Health	Level 1, Cardio, Ortho, Digestive Health (GI), Cancer, GU, Bone Marrow Transplant, Neuro, Epilepsy	Level 2, Center of Excellence, Strategic/Priority, Clinical Trials, Second Opinion, Specialty Oncology	All	All
Group Calls		X	X	X	X
Essential Requests		X	X	X	X
Patient Auth	X	X	X	X	X
Demos	X	X	X	X	X
Incoming Calls	X	X	X	X	X
Updating the Customer		X	X	X	X
Copy Service	X	X	X	X	X
International Calls			X	X	X
Escalations		Level 1 > 3 days of provider calls	Level 2 > 3 days of provider calls	All	All
Translator Service		X	X	X	X
Aged Cases (> 7 days)			X	X	X
Other					Back up Manager

Medical Fulfillment Specialist: Levels 1 - 5

Job Duties	Level 1	Level 2	Level 3	Level 4	Assistant Manager
Type of Account	Transplant, COE, Dental, GI, Ortho, Oncology, Mental Health	Level 1, Cardio, Epilepsy, 2 nd Opinion, Neuro, Clinical Trial, BMT, New Launches	Split MDA cases*	All	All
Indexing			Standard	RvNR	All
Document Delivery/QA			QA/Document Delivery of non-Indexed Records	QA/Document Delivery of Indexed/ Partial Records Indexed	All
Updating the Customer			X	X	X
Bookmark			X	X	X
Same day Offshore Follow ups	X	X	X	X	X
If needed, support Outreach with follow up calls	X	X	X	X	X
Other					Backup Manager/Mentoring/Coaching Team Members

**Specific to MDA pod only.*

Medical Imaging Specialist – Levels 1 - 5

Job Duties	Level 1	Level 2	Level 3	Level 4	Assistant Manager
Traveling (onsite in Rochester, NY only)	X	X	X	X	X
Outreach	X	X	X	X	X
Processing	X	X	X*	X*	X*
Loading		X	X*	X*	X*
Pushing			X**	X**	All
Other					Back up manager

**Not a primary job responsibility but provides back up support as needed.*

***Level 3 Onshore Pushing = John Hopkins, UC Davis, UH Seidman, UCSF, UCLA, HCA Midwest, Georgetown, Henry Ford*

***Level 3 Offshore Pushing = Hinge, MDA, MUSC, Tampa, VCU*

***Level 4 Onshore Pushing= CCF, HFHS Structural, HFHS Urology, UCSD*

***Level 4 Offshore Pushing = Duke, Carrum, SCCA, UTSW, Healthscope, Stanford, Mount Sinai, Presbyterian St Lukes*

COMPETENCY DEVELOPMENT



The following section provides more details for each skill required for the specialist roles to help you understand what is expected for advancement. Additionally, this guide provides a list of learning/training/experiential initiatives to enable employees to develop the necessary skills for each position. *See section titled “Growth & Development Strategies”.*

Resilient: A resilient person demonstrates a keen sense of flexibility and adaptability by being able to remain focused, driven, and positive. Additionally, a resilient person is able to adapt to different situations and roles quickly. This demonstrates the individual’s ability to survive, grow, learn, and achieve success. You embrace change with positive thinking and the desire to learn new things.

- **Level 1:** Seeks out and is open to change.
- **Level 2:** Identifies opportunities and is comfortable with change.
- **Level 3:** Balances multiple changing priorities.
- **Level 4:** Identifies, prioritizes, and adapts to changing business needs.
- **Level 5:** Identifies long term opportunities & prioritizes those projects with daily business needs.

Behavioral Indicators:

- Has a willingness to learn.
- Learns from those around you.
- Steps outside comfort zone.
- Embraces opportunities that come your way.
- Looks for opportunities to try new things or that keep you learning.
- Works to gain an understanding of change.
- Experiments with different strategies that help develop solutions to common problems.

Results Driven: A results-driven person sees the benefit in achieving and exceeding goals and is focused, motivated in accomplishing goals and



delivering results. Results- driven individuals convey a sense of urgency and a commitment to one's work and drives issues and tasks to closure.

- **Level 1:** Meets expectations in a timely manner.
- **Level 2:** Consistently exceeds standards and goals.
- **Level 3:** Able to meet standards in multiple areas.
- **Level 4:** Strives to deliver results through themselves and others.
- **Level 5:** Delivers results through themselves and others.

Behavioral Indicators:

- Takes responsibility for own mistakes (doesn't blame others).
- Sets standard for high performance.
- Defines what "good results" looks like.
- Displays sense of urgency when completing tasks.
- Seeks out stretch goals.
- Finds motivation in completing tasks at the right quality level.
- Prioritizes time and effort to complete goals.
- Plans for contingencies to ensure delivery.
- Provides input into goal setting.
- Balances long- and short-term goals to deliver sustainable results.

Job Knowledge: Before an individual should seek out growth and new opportunities, it is expected that they have a true understanding of their current role and the different functions they are responsible for. However, job knowledge



is not just looking at how you perform in your current job, but what other knowledge you have obtained about the organization that will help you be successful. What are the policies, procedures, and resources available, and how does it support the mission?

- **Level 1:** Understands the expectations of the position.
- **Level 2:** Has specialized knowledge of assigned position.
- **Level 3:** Has functional knowledge in multiple areas.
- **Level 4:** Has specialized knowledge of multiple areas.
- **Level 5:** Able to apply specialized knowledge within functional area.

Behavioral Indicators:

- Seeks out opportunities for additional training.
- Minimal mistakes in functional area.
- Provides specific feedback on process improvements.
- Understands mission and organizational goals.

Problem Solving: Problems may arise in any given workday no matter your role. You may face problems that are large or small, simple or complex, easy or difficult. You may solve a problem for a customer or support someone solving a problem. Problem solving offers opportunities to develop skills such as creativity, decision making, and active listening.

- **Level 1:** Utilizes available resources and seeks help when needed.
- **Level 2:** Addresses problems and looks for solutions with an open mind.
- **Level 3:** Seeks to resolve problems with minimal direction.
- **Level 4:** Seeks to address and resolve the root cause of problems.
- **Level 5:** Able to apply specialized knowledge within functional area.

Behavioral Indicators:

- Works to solve problems.



- Approaches supervisor with solutions.
- Sees specific opportunities for improvement within own area.
- Identifies many possible causes of a problem.
- Identifies what needs to be done and takes action before being asked or the situation requires it.

Customer Focused: Customer service is a part of every role at eHealth Technologies. An individual who displays a customer focus understands that the customer comes first—it's our job to provide a positive experience. Customer service is more than service to those who use our products but also our colleagues, managers, and team members.

- **Level 1:** Delivers eHealth experience to all customers.
- **Level 2:** Consistently delivers eHealth experience to all customers.
- **Level 3:** Works to address escalated customer issues to maintain eHealth experience.
- **Level 4:** Identifies and understands customer needs.
- **Level 5:** Anticipates customer needs and concerns.

Behavioral Indicators:

- Displays empathy, patience and consistency when approaching customer interactions.
- Listens to customer feedback and acts on it.
- Understands the different facets of customer service and who your "customers" are.
- Fundamental understanding of how we bring value to customers.
- Quickly and effectively responds to customer problems and complaints.

Communication: A fundamental element to business success, we communicate with others on many levels throughout each day. Good communication allows people to build and maintain strong working relationships and achieve or exceed



organizational goals. Skills advanced in the area of communication can have a positive effect on your life overall because communication is used in our personal and professional lives.

- **Level 1:** Asks questions and supports coworkers.
- **Level 2:** Shares information effectively to support coworkers.
- **Level 3:** Engages with colleagues in a clear and concise manner.
- **Level 4:** Collaborates with partners and leaders to meet goals.
- **Level 5:** Works to create a collaborative culture.

Behavioral Indicators:

- Actively shares information.
- Openly discusses issues in a respectful and constructive manner.
- Ensures regular and consistent communication occurs.
- Uses multiple channels or means to communicate important messages (email, memo, meetings, etc.).
- Uses professional language to express ideas and thoughts.

Professional Conduct: Consistently behaves in a manner that models our company values. Demonstrates behaviors that are respectful, positive, and encouraging, willing to help others, delivers excellent customer service, is a team player, is reliable and is looked up to by coworkers. Skills advanced in this area are instrumental to advancement within Operations and the company overall. Professional conduct leads to success for both the employee and the organization.

- **Level 1:** Understands and demonstrates professional behavior & core values.
- **Level 2:** Role models company values and professional conduct at all times.
- **Level 3:** Encourages team members to model core values and behave professionally.
- **Level 4:** Drives a culture of professional conduct that models core values.



- **Level 5:** Develop and coach team to consistently model core values and behave in a professional manner.

Behavioral Indicators:

- Embraces a professional work environment, at all times.
- Behaves in a manner that demonstrates professionalism and company values consistently.
- Strives to create a culture built on company values and professional conduct.
- Consistently embraces and encourages diversity.
- Creates a work environment that is truly inclusive and safe for all employees and team members.
- Develops personal and professional skills to strengthen one's emotional intelligence.

Team Engagement: An engagement-driven person understands the true benefits that come from engaged and developing teams. Engagement is multi-faceted and can look different to many people. Engagement can be seen through commitment to one's work and organization, interest in learning and taking on other tasks, or positive energy that motivates coworkers. Engagement is crucial to the success of any team because engaged teams are more productive.

- **Level 1:** Role models company values with team members.
- **Level 2:** Is genuine and inclusive towards others.
- **Level 3:** Influences team culture through leading by example.
- **Level 4:** Drives an environment of trust and respect with leader support.
- **Level 5:** Drives an environment of trust and respect within functional area.

Behavioral Indicators:

- Respects diversity.
- Promotes cooperation with other work units.
- Respects confidentiality of information or concerns of others.



- Tries to build relationships with people whose assistance, support, and cooperation may be needed.
- Is honest and forthright with people.
- Can gauge engagement on an individual level.



GROWTH & DEVELOPMENT STRATEGIES

Research and practice indicate that there are multiple strategies you can use to learn and grow in your career. You are more likely to be successful when using these strategies with the support of your manager, so reach out to your manager to discuss further. Here are some approaches you can take:

- **eHealth Technologies Learning Library:** ehealthtechnologies.info/learning-resources
- **Cross-train:** learn another position on your team or related team.
- **Operations certification training**
- **Operations Workflow Overview training:** (formal or on-the-job).
- **Special team projects or assignments:** a group problem-solving situation to develop your skills working with others.
- **Serve on an interdepartmental committee:** for example, the Employee Council, special project teams, etc.
- **Vacation or leave assignments:** step up to take on responsibilities when someone is on PTO or leave.
- **Shadow someone:** request time to shadow someone else on your team, a manager or someone on a different team in the organization.

- **Mentoring:** share your experience, knowledge, and skills with a co-worker or find someone to share those with you, or better yet, both!
- **Elective training/reading:** seek out training, other online resources or visit your library to read up on skills. Follow that learning up with a summary (verbal or written) to your manager and/or team.
- **Networking:** regularly connect internally and externally with colleagues; allows for best practice sharing and gaining new insights in your field.
- **Join professional organizations:** participate in initiatives that further support your growth & development as well expand your network.
- **Presentation/training/leading opportunities:** seek opportunities to lead a team meeting, train a new co-worker, give a tour of your workplace to visitors, present at team or company functions (i.e. New hire Orientation, Operations Training, Monthly Operating Reviews, Monthly Manager meetings, etc.).
- **Seek ongoing feedback:** ask co-workers or managers for feedback, formal or informal, including skills that you can improve; be open & accepting to the feedback to fully allow yourself to improve.
- **Free online learning options:** [Google OnAir](#), [Dale Carnegie](#), [Coursera](#)

What's Next?

As you partner with your manager and others, be sure to consider the following when developing your plan for your career growth:

- What pieces of your current job do you enjoy the most? What tasks of your current position do you enjoy the least?
- What motivates and energizes you?
- What skills do you feel would help you to master your current role?
- What's the link between your personal goals and our company goals?



- What training or learning experiences (i.e. serving on internal committees, teams) would strengthen your current skills?
- What training or learning experiences would help you to overcome or compensate for your current weaknesses or lack of experience?
- Take advantage of these free assessments to grow and develop skills to achieve your career goals:
 - Emotional Intelligence assessment: [Test Your Emotional Intelligence, Free EQ Quiz, EI Test \(ihhp.com\)](#)
 - Resilience: [Take a Free Resilience Questionnaire! – Leading Higher](#)
 - Strengths Finder: [How Individuals Use CliftonStrengths | EN - Gallup](#)

Once you and your manager have identified the top 2-3 skills you need to develop in order to advance within Operations, be sure to complete a developmental action plan to outline the skills along with the learning initiatives that will enable you to grow those skills. See the Appendix of this guide for a sample Career Development Action plan form, which should be updated and reviewed periodically with your manager to ensure you are on track to achieve your plan.

For more information, work with your manager, Human Resources or the Director of Talent Development.

APPENDIX

Individual Development Plan (IDP)			
Who you are: Education: Employment/experience:	My Goals:		
	Short Term: Professional: Personal:	Mid Term (2-5 yrs): Professional: Personal:	Long Term (> 5 yrs): Professional: Personal:
	Current Competencies, skills, knowledge, experience:		
Values: Areas Opportunity:	Development needs & skills required for current role and future goals:		
	Action Plan details & timeline:		

“Personal development – the never-ending chance to improve not only yourself, but also to attract opportunities and affect others.” –Jim Rohn