

Quality Redesign – Key Changes Transcript

Slide 1: The purpose of this video is to provide a brief overview to the changes in the quality element. The quality assessment is changing in 3 main areas – limiting the evaluation to applicable tasks, using a quality threshold that incorporates the sampling margin of error, and reducing the number of individual quality reviews with the shift to a task-based assessment.

At this time, the quality checklist is not changing.

Slide 2: Let's start with the first concept – evaluating applicable tasks. On this quality checklist, there are 11 total tasks that can be evaluated. Some of those questions are applicable to the work the employee has done on the transaction, and some are not applicable.

In the current quality program, non-applicable tasks are considered “passing.” The assessment formula is passing tasks divided by all tasks. Therefore, in a case where there was one error, the assessment score would be 10 out of 11, or 90.9%.

Slide 3: In the updated quality program, the checklist still contains 11 tasks, but only the applicable tasks will be included in the quality assessment, as they specifically relate to the transaction under review. Non-applicable tasks will be excluded from the calculation.

By including only applicable tasks, the assessment ensures that the employee is evaluated on the work they are responsible for within a particular transaction. The assessment formula is passing applicable tasks divided by all applicable tasks. Therefore, in a case where there is one error, the assessment score would be 3 out 4, or 75%.

Slide 4: You may be thinking, 75%! How will I ever get a passing score? Before you get too concerned, let's introduce our next concept: the quality threshold. In the current quality program, performance standards lists a static quality number within the performance element. The employee would be expected to meet this quality percentage at any point during the fiscal year, regardless of how many reviews have been completed. A single error, especially early in the fiscal year, would have a large impact on meeting the static quality score. In the example previously provided, 1 error in the first review of the fiscal year would result in a 90.9% score, which is below the 96% quality expectation.

Slide 5: The updated quality assessment gives employees the benefit of the doubt and implements a margin of error based on the number of applicable tasks reviewed. Under the quality threshold chart as found in Appendix A of the performance standards, if an employee receives an error within the first 4 applicable tasks reviewed, they receive a score of 75%, but on this chart, they are still above the exceptional threshold of 70.8%. If this is an isolated error, the employee would remain above the threshold as additional tasks are reviewed.

By giving the employee the benefit of the doubt, the assessment decreases impact of single errors early in the fiscal year, thereby reducing the stress, anxiety, and rework typically associated with monthly quality assessments.

Slide 6: Let's get into our final concept: the number of individual quality reviews, or IQRs. The current and updated quality programs differ in their initial assumptions about employee quality. Because the assumptions in each system are different, so are the number of IQRs needed.

The current quality program has a static quality standard and thus requires a large sample of 60 reviews per year to prove that employee is meeting the quality standard. The updated quality program flips the paradigm, giving the benefit of the doubt to the employee through the dynamic quality threshold. As you recall, the quality threshold is based on the number of applicable tasks reviewed, not on the number of IQRs

Therefore, the updated quality program requires fewer IQRs per year. Management plans to review 3 transactions per employee per month, for a total of 36 IQRs per year. This is subject to change as management continues to evaluate the quality program.

Slide 7: Keep in mind, because employees have different workload assignments, each employee may have a different number of applicable tasks reviewed after a similar number of IQRs. The Employee Performance Report will display your unique number of applicable tasks reviewed and the associated quality thresholds.

Slide 7: In summary, the quality assessment is changing in 3 main areas – limiting the evaluation to applicable tasks, using a quality threshold that incorporates the sampling margin of error, and reducing the number of individual quality reviews with the shift to a task based assessment.