



## **Policy and Procedure Manual**

## Table of Contents

<b>INTRODUCTION.....</b>	<b>3</b>
<b>New Hire Process .....</b>	<b>4</b>
New Hire Timeline .....	4
EMPLOYEE FORMS .....	5
<b>REHIRE PROCESS .....</b>	<b>7</b>
Rehire Paperwork –.....	7
<b>PERSONAL LEAVE OF ABSENCE .....</b>	<b>8</b>
<b>Time &amp; Mileage Documentation.....</b>	<b>9</b>
Employees’ Hours .....	9
Mileage .....	9
Other Information .....	9
<b>Disciplinary and Termination Procedures .....</b>	<b>10</b>
Voluntary Terminations.....	10
Disciplinary Action .....	10
Counseling/Training .....	10
Verbal Warning .....	11
Written Warning.....	11
Suspension .....	11
Termination .....	11
Documentation .....	11
<b>SAFETY .....</b>	<b>13</b>
Safety Reporting.....	13
Safety Infractions .....	13
<b>MVR POLICY .....</b>	<b>14</b>
<b>QUALITY CONTROL PROCEDURES .....</b>	<b>15</b>
QUALITY CONTROL SPECIFICATIONS.....	15
QUALITY CONTROL JOB SELECTION: .....	15
QUALITY CONTROL JOB SCORES:.....	16
DISCREPENCIES .....	17
DOCUMENTATION.....	17
EMPLOYEE CABLE THEFT .....	18
<b>RECORD RETENTION .....</b>	<b>19</b>
<b>EVALUATION PROCEDURE .....</b>	<b>20</b>

## **INTRODUCTION**

This manual contains the current Policies and Procedures of Makotek that are not in the Employee Handbook or the Field Safety & Service manual. Those handbooks are referenced in this manual.

The Policy and Procedure Manual will be updated from time to time as new policies and procedures are formed and current policies and procedures are amended. These changes will be in writing and will be updated on the Makotek website.

All rights are reserved. No part of this Policy and Procedure Manual may be reproduced in any form by electronic or mechanical means, including information storage and retrieval systems, without permission in writing from a Vice President.

## **NEW HIRE PROCESS**

Prior to the first day of employment, all employees must have a negative Drug Test result. Employees returning to Makotek after a separation of any duration must also satisfy the drug test requirement.

## **NEW HIRE TIMELINE**

- Day One – Employee completes all of the paperwork marked Phase I on the Employee Checklist. This paperwork is then faxed to Michele Hays in the Orlando office.
- Day Two – Get truck rigged out and get all employee purchased tools and safety items on Makotek tool sheet.
- Day Three (completion of training) – Manager completes a Field Certification, a Vehicle Safety Checklist and a Written Certification. Equipment is issued to employee. A Post Tax deduction and an Equipment Purchase and Receipt Form are completed. The start date for deductions is 16 days after the employee receives the equipment. Fax these forms to Michele in the Orlando office.
- Day Four – QC of 100% of the jobs disconnected on techs first full day in the field.
- Day Seven – Mail Original Oasis Paperwork to Oasis within 7 days of hire date. Send to:  
  
Oasis Outsourcing  
2601 Cattleman Road Suite 300  
Sarasota, FL 34232
- Day Ten – Complete the 10-Day Field Certification and fax to Michele in Orlando.
- Day Thirty – QC of 20% of disconnects done must be completed and reported to Martin German per QC Policy.

## EMPLOYEE FORMS

### Oasis Forms

The booklet of forms marked Oasis, beginning with the Data Sheet.

Data Sheet – All portions, with the exception of the “To Be Completed by Employer” MUST be filled out by the employee. The employer portion must have **proper title and workers compensation code**, as well as Date of Hire.

W-4 – This form, filled out and signed by the employee, will specify the taxes that are withheld from the employees check. If an employee writes “Exempt”, no taxes will be taken out, even if a number of dependants is filled out.

I-9 (Employment Eligibility Verification) – This is a federal form that is proof that the employee is legally able to work in the United States. If employee is an Alien, Alien # MUST be on this form and a copy of Alien card on file.

I-9 Section 2 - The List of Acceptable Documents for use in this Section are listed on the back. The person that signs this document must have seen these documents and have a copy made for personnel file.

I-9 Certification – The employees start date must be entered in this section and authorized person must sign that this is true under penalty of perjury.

The other pages of the Oasis packet must be filled out and signed where applicable.

### Other New Hire Forms –

Employee Checklist – A chart of the Employee paperwork that is necessary. It is broken into Phase I and Phase II. Phase I is due Prior to the employee beginning employment. Phase II is due prior to the tech entering the field on his/her own.

Edge Authorization – This form authorizes Makotek to do a background check on the employee. The background check is required by most of our clients and is a valuable resource into an employees’ history.

Job Description – Explanation of employees’ job duties.

Pay Schedule – This is an explanation of the pay an employee will receive for work performed. It also includes an explanation of possible situations that would cause a 5% reduction in pay for 4 weeks.

Employee Deduction Policy – Explanation of situations where pay will be deducted from an employee. Signature on this form shows that employee understands this policy.

Cable Theft Agreement – This form states Makotek’s policy on illegal use of cable. If an employee uses cable illegally or helps another person to use cable illegally, it is grounds for immediate termination.

Employee Handbook Acknowledgement – This certifies that an employee has received and understands the contents.

Field Safety & Service Manual Acknowledgement – This Manual outlines field safety issues, as well as Fair Debt Practices Act, collection and disconnect tips and other field related issues. This form certifies that the employee received and understands the contents.

Copies of –

- Valid Vehicle Insurance

- Valid Drivers License

- Social Security Card or Birth Certificate

Field Certification – This is a field verification that a tech is able to perform the tasks required. It includes ladder handling, paperwork and customer contact. A Field Certification is done before the tech goes to the field alone, after 10 days of fieldwork and yearly, when the manager does a ride along with the tech.

Vehicle Checklist – This is a verification that all the equipment needed to do the job safely is in the tech's vehicle. This is done prior to the tech entering the field and once a quarter, within the first month of the quarter.

Equipment Purchase and Receipt Form – This form details the equipment the employee received from Makotek and the cost of the equipment.

Post Tax Deduction Form – This form is the amount to be deducted each week from the employee for the equipment. The total amount is to be filled in next to Total Due. The Deduction per pay period is filled in and the start date for deductions in the proper column. **The start date for deductions is 16 days after the employee gets the equipment.**

Written Certification – This is a written test to ensure that the technician understands the basis of the job. It includes safety, as well as collection practices.

Vehicle Insurance – A quarterly check of insurance must be performed. In addition, each technician's insurance must be checked on the month it is due to expire.

## REHIRE PROCESS

Prior to going through the hiring process, all prospective rehires must pass a Drug Test and Background Check.

For this process to be used the following criteria **MUST** be met:

- The employee must have been “Recommended for Rehire” on the termination form.
- Manager/Supervisor must verify that the employee to be rehired is eligible. This should be done via email to Michele, prior to having the applicant drug tested. Verification is needed for any employee for whom an “Employee Rehire Form” is completed or any applicant who marks on the employment application that they have had previous employment with Oasis.

Employee’s who would **NOT** be eligible for rehire would be:

- A. Employee for whom the “No” box was checked on the Termination Form. Reasons for “No” to be checked include:
  - Any employee who had an involuntary termination.
  - Any employee who had a voluntary termination and did not give at least a one week notice.
  - Any employee who the General Manager checks the rehire box as “No” with an explanation.
- B. Employees for whom neither a “Yes” nor a “No” was designated on the “recommend for rehire” election.

Oasis will notify Makotek of any employee who was rehired that was flagged as not recommended for rehire.

Any employee who was rehired that was not eligible for rehire will be immediately terminated. Any exception must receive Vice President approval.

## REHIRE PAPERWORK –

- A. For Employees separated less than 6 months:

Complete all New Hire Paperwork with the exception of:

- Oasis Data Form Pgs 1 & 2 – this is replaced by the Rehire Form
- Previous Work Experience – page 3 of Oasis Forms
- W-4 – unless employee wishes to change his deductions.
- Employee Authorizations & Acknowledgements – pg 7
- Acknowledgement of Receipt of Handbook – pg 8
- Direct Deposit – pg 9
- Group Benefits Acknowledgement – pg 10
- Voluntary EEO Identification – pg 11

Timeframes for Phase I & Phase II paperwork apply.

- B. For Employees separated more than 6 months ALL new Hire Paperwork must be completed.

## **PERSONAL LEAVE OF ABSENCE**

Unless otherwise required by law, employees who have successfully completed ninety (90) days of continuous service but have not met the service requirements for the Family and Medical Leave Act Policy, and are in need of time off may be eligible to request a leave of absence (Complete an Oasis form, “Application for Leave of Absence”) for a period of at least 2 weeks but not longer than 90 days.

Requests for personal leave must be submitted to your work site supervisor in writing and will require prior approval. Requests for personal leave will be evaluated based on a number of factors, including anticipated workload requirements and staffing considerations during the proposed period of absence.

Upon approval, the work site supervisor must back fill for personal vacancies resulting from personal leaves of absence. Decisions to not back fill an open position due to workload requirements must be approved by a Makotek Vice President.

Unless a qualified FMLA leave, health benefits, if provided, will be continued until the end of month in which the approved personal leave begins. Employees will then become responsible for the full costs of these benefits if they wish coverage to continue. Payment for full cost of benefits is to be paid by the employee to Makotek at the start of the leave for the full period of the leave. When the employee returns from personal leave, benefits will again be provided according to the applicable plans.

Benefit accumulation will not be suspended during the leave.

An employee on a personal leave of absence (not FMLA) must recognize that there may not be a position available when he or she wishes to return to work.

If an employee fails to report to work within 2 days at the expiration of the approved leave period, Makotek will assume the employee has resigned.

The work site supervisor is to complete and submit an Oasis Personal Action Change Form for the employee upon return to work from a personal leave of absence.

## TIME & MILEAGE DOCUMENTATION

Employee Time & Mileage Sheets serve as documentation needed to support hours and mileage paid. The Time & Mileage sheet is the first document requested involving any claim or dispute involving pay or hours.

Additionally, our industry is somewhat unique in that a part of pay for nearly every job completed includes an untaxed mileage reimbursement piece. Both our Payroll processing company and the IRS routinely scrutinize the untaxed nature of the pay.

Accordingly, these forms must be completed in full, be accurate, and signed. When not done properly, the company is exposed to an unacceptable level of risk. It is the manager's job to weekly review, scrutinize and approve each employee's Time & Mileage sheet.

Proper policies and procedures to be followed for Time & Mileage Sheets follow:

### EMPLOYEES' HOURS

- Must Add Up Daily and Weekly - Start Time to Stop Time, minus breaks, MUST add up to the Total Hours Worked for each day. The hours worked each day MUST add up to the Total Hours for the week.
- Must Match the Workbook – The total hours the employee worked for the week MUST match the hours in the Workbook for the same week.
- Start & End Time - Start Time and End Time must be reasonable and, in the case of Field Employees, not be exactly the same every day.
- Breaks – Employees are to take breaks in accordance with the Employee Manual. Any break taken must be documented on the Time and Mileage Sheet.

### MILEAGE

- Must Add Up Daily and Weekly – The difference between Start Mileage and End Mileage must equal the Total Daily Work Mileage. The Weekly Total Miles must equal the sum of all of the daily miles.
- Must Match the Workbook – The total miles the employee worked for the week MUST match the miles in the Workbook for the same week.
- Start & End Mileage – The Starting Mileage is to be from the employees first job or the office, whichever they go to first. The Ending Mileage is the mileage at the last job of the day, NOT their home.

### OTHER INFORMATION

- Information on Top of Time Sheet – All of the information must be filled out, including the employee's social security number.
- Changes Must be Approved – Any change made to the time sheet (i.e. reduced hours) must be initialed by the employee.
- Workplace Accident Question – Either yes or no MUST be checked in order for the Time Sheet to be approved by the manager.
- Signatures – Both the manager and the employee must sign the Time Sheet.

## **DISCIPLINARY AND TERMINATION PROCEDURES**

As a company, Makotek is answerable to many different government agencies including, OSHA, EEOC, State Unemployment Agencies and the State Depts. Of Labor. In order to ensure compliance with these agencies, and to avoid unjustified claims, documentation of disciplinary action and/or termination must be accurate and complete.

This memo will state the procedures to be followed for disciplinary action and termination, (both voluntary and involuntary.)

### **VOLUNTARY TERMINATIONS**

Request the employee complete an **Exit Survey**, which can be found on the Makotek website. If employee fails to complete the Exit Survey, note on termination form that employee resigned, and the reason for not completing the Exit Survey. Additionally, accept a resignation letter if an employee has prepared. Forward the Exit Survey and/or resignation letter with the termination form to the Orlando office.

**Quit without Notice/Job Abandonment should not be used as a reason for a voluntary termination.**

### **DISCIPLINARY ACTION**

Generally, there are 5 steps to the disciplinary process, Counseling, Verbal Warning, Written Warning, Suspension and Termination. The severity of the infraction will determine if the steps are followed in succession or if steps are skipped.

- o The decision regarding disciplinary action is the General Manager's.
- o Infractions must be handled consistently. Similar incidents must be handled similarly.
- o It is the manager's obligation to document disciplinary decisions and actions taken (see "Documentation" section).

### **COUNSELING/TRAINING**

- o Explain the reason for the counseling session.
- o Discuss recommendations for correcting the behavior.
- o Discuss consequences of any further occurrences (verbal/written warning, suspension, termination).
- o Manager should document session on the Employee Warning Form (available on the Makotek website). Clearly indicated on Warning form that action taken was an employee counseling.
- o Employee and Manager both sign Warning form. If employee refuses to sign, document employee's refusal to sign.
- o **Fax completed form and supporting documentation to Orlando. Keep the original in employee's file.**

## VERBAL WARNING

- o Explain the policy/procedure violation in detail. Include documentation.
- o Discuss consequences of any further occurrences (written warning, suspension, termination). This is generally written as “up to and including termination.”
- o Document warning on the Employee Warning Form on the Makotek website.
- o Under Type of Reprimand, mark Verbal.
- o Employee and Manager both sign the reprimand form. If employee refuses to sign, document employee’s refusal to sign.
- o Fax completed form and supporting documentation to Orlando. Keep the original in employee’s file.

## WRITTEN WARNING

- o Same as Verbal Warning; except mark “Written” on Warning Form.

## SUSPENSION

- o Same as Verbal Warning; except complete “Suspension” area on Warning Form. Suspension begin date/end date must be completed.

## TERMINATION

- o If the previous steps have been followed, this will not be a surprise to the employee.
- o Whenever possible, have a witness present during the termination (preferably a supervisor or lead tech). A witness should always be present when a termination includes a manager and an employee of the opposite sex.
- o Be short and to the point. Begin the conversation with the fact that the employee is being terminated.
- o Best practice is to prepare a statement and read statement verbatim during termination session. If employee questions termination, do not stray from prepared statement, and re-read statement if necessary.
- o **Any termination within the 90-day orientation period is considered “Failed to Complete Orientation Period.”**
- o If termed within the 90 days, include a short explanation on the fax cover sheet, i.e., did not show up for work for 4 days, could not handle the ladder, etc.
- o **Termination reasons that need VP approval for use include – Unsatisfactory Performance/Inability, Excessive Tardiness/Willful and Reduction in Work Force-48 hr notice.**
- o Complete the Termination Form.
- o **Fax completed form and supporting documentation to Orlando. Keep the original in employee’s file.**
- o Destroy employee files of terminated employees 2 weeks after termination date.

## DOCUMENTATION

This area includes **examples** of policy violations and documentation needed for those violations. This is a list of some of the more serious infractions; this list is not all-inclusive. Refer to the Makotek Employee Handbook for additional information on prohibited conduct.

- **Disconnects Not to Specifications –**
  - Copy of Work Orders or Daily Turn In documenting Disconnect done to specifications, signed by employee. (Proof employee took credit for the job)
  - Copy of the QC report for those jobs with validation from QC Person showing the jobs not done. (Proof job not done to specifications)
  - Pictures of jobs in question.
- **Money Lost/Stolen –**
  - Copy of Work Orders or customer receipt that documents money collected and the amount. Work order or receipt should have the employee's signature.
  - Copies of daily turn in (from the dates that the work order should have been turned in) showing the work order in question was not remitted.
- **Customer Service Related Issues –**
  - Copy of Customer Complaint, either in writing from the client (possibly notes on customer account) or the customer, or as documented in writing from Managers conversation with the customer.
  - If there are witnesses to the infraction, signed statements from each should be included.
- **Equipment Collected/Not Turned In–**
  - Copy of Work Orders or Daily Turn In documenting equipment picked up, signed by employee.
  - Copy of Equipment log showing the equipment in question not turned in. This may be a termination offense if it is a repeated behavior, or with other behaviors not conforming to policy.

## **SAFETY**

For information on safety and safety techniques, please refer to the Field Safety & Service Manual.

### **SAFETY REPORTING**

**Weekly Safety Meeting** – A meeting is to be held once a week on Safety. A Sign-in Sheet is on the Makotek website. In addition to a sign-in sheet, Safety Topics are posted there. Each week choose a topic to discuss from the list, or choose a topic from an occurrence in the system. These are faxed to the Orlando office weekly.

**Quarterly Ladder Safety Meeting** – Once a quarter, the meeting will be a “Show and Tell” on ladder safety, with all employees. This includes taking the ladder from the truck, putting it on the pole, climbing the ladder, strapping off, and returning the ladder to the truck. Each tech in the meeting will do this, critique each tech and ensure that everyone understands the proper way to handle a ladder and strap off.

Sign-in sheet must be faxed to the Orlando office.

**Field Certification** – A Field Certification is completed prior to the tech entering the field, after 10 days in the field and yearly during the manager’s ride along with each tech. Field certifications are to be faxed to the Orlando office.

**Vehicle Checklist** – This will be done prior to the tech going to the field (Phase II paperwork) and once a quarter within the first month of the quarter. Fax these to the Orlando office.

**Ladder Inspections** – Ladder inspections will be conducted quarterly as part of the Vehicle Checklist. This will be a comprehensive inspection, not just a visual inspection. The ladder will be taken off the truck and raised and lowered to check for damage. After the inspection, if the ladder passes, initial and date the inspection sticker on the side of the ladder. If the ladder does not pass, take the necessary steps to correct, up to and including replacement.

**Proof of Insurance** – Each quarter as part of the Vehicle Checklist, verify auto insurance is valid. Additionally, maintain a tickler file by month. Use it as a reminder from whom an updated proof of insurance is needed.

### **SAFETY INFRACTIONS**

Employees will have a 5% reduction in rates listed under “Pay” for four weeks for violation of company policy. Managers may give each employee one warning for Safety Violations, unless it is a blatant disregard of safety policy (ie On a ladder without a safety belt). The reduction in pay would begin immediately.

## **MVR POLICY**

Any employee who will be required to drive as part of their responsibilities with Makotek must adhere to the following:

- Must have a valid license
- Must not have had his/her license suspended for driving violations within the last 12 months
- Must not have had his/her license revoked within the last two years
- Must not have been convicted of driving under the influence within the last two years
- Must not be currently on probation for driving under the influence
- Must not have been cited for road rage within the last two years
- Must not have been convicted of reckless driving within the last two years
- Must not have been involved in one major preventable vehicle collision within the last 12 months
- Must not have been involved in two major preventable vehicle collisions within the last 36 months

# QUALITY CONTROL PROCEDURES

## Field Collections & Disconnects

### QUALITY CONTROL SPECIFICATIONS

Each system will check jobs based on the clients' disconnect specifications. Each system is to obtain disconnect specifications from the client and use the specifications to customize the system's QC procedures. At a minimum, Makotek's QC must check all the same items as our client's QC.

Client disconnect specifications and any updates or changes are to be sent to the QC Manager in the Orlando office.

Quality Assurance will be performed AND completed weekly during the same billing week in which the jobs were completed. By definition the Weekly QC Report includes:

- 1) Weekly QC Summary
- 2) Individual QC Sheets
- 3) Digital Pictures

**Due Date:** The weekly report is due in the Orlando office at EOB Tuesday for the previous week (work field completed Friday – Thursday). The weekly report (including pictures) can either be faxed or sent electronically. If the system chooses to fax the report weekly, an electronic version of all pictures and the QC report file (weekly and MTD summary) must be sent at the end of month.

### QUALITY CONTROL JOB SELECTION:

#### **A) Office QC:**

Active tags from disconnects are to be taped to Makotek work order copies. Technicians are to document the work order with what was found on the line (i.e. matching tag, different tag#, no tag, etc).

General Manager is to inspect work orders to verify tags returned match tag number on work order.

It is at the General Manager discretion on the proportion of jobs with unmatched tags that are selected for field QC. Judgment will depend on the accuracy and reliability of the clients overall tagging system.

#### **B) Field QC – New Technician:**

Technicians new to the field present the highest risk for improper completion of disconnects. Individual training issues and discrepancies in technique can be easily corrected if found early. To this end QC of a new technician's work must include:

- >100% of disconnects completed during the first day of employment and;
- >20% of disconnects completed during the first 30 days of employment.

### **C) Field QC – All other Technicians:**

- >The greater of 10% of disconnects completed during the month or 15 jobs
- >Jobs selected for field QC should include disconnects completed within 24 hours of QC verification.
- >Jobs selected for field QC are to be taken from the technicians daily turn-in that is used for payroll. Work order copies can be used for field assistance but cannot be the source of selection. If Makotek's copy of the work order is needed for QC assistance than a photocopy is to be used by the QC inspector and the original retained in the office.

### **D) QC Inspections of QC Technicians:**

- >General Managers that utilize a technician to complete QC and Regional Managers are to perform a minimum of 30 QC inspections per month. Jobs that are inspected should include a sample of jobs already QC'd and jobs that have not been inspected. QC inspections are to be documented on a QC report and submitted to the QC Manager in Orlando.
- >Small Systems that do not employ a full time manager are to receive quarterly assistance from a nearby system. On a quarterly basis an employee is to visit the system for a week to perform QC.

## **QUALITY CONTROL JOB SCORES:**

### **Jobs are to be scored based on conditions at the time of inspection.**

All jobs begin with 10 points and any discrepancies are subtracted as follows:

#### **A) Disconnect:** 6 possible points.

- 3 points for actual disconnect (including cutting connectors or reattaching to terminator)
- 1 point for taking off traps
- 1 point for taking off unnecessary splitters
- 1 points for wrapping the drop (aerial drops)

**B) Drop Tag:** 1 point includes all aspects of tagging, including any markings on the tag, return of active tags or any other tagging issue

**C) Pedestal/Lockbox Secured:** 1 point for locking the ped/lockbox or documentation of ped/lockbox not being lockable.

**D) Drop Terminated and Weather Proofed:** 1 point for terminating all the ports at that tap and proper weather proofing of drop (i.e. drop cap, boot, shrink wrap, fittings cut)

**E) Paperwork Accurate:** 1 point for proper completion of all paperwork (i.e. work order, turn-in sheet, and plant damage form).

>**Unauthorized Viewers** – If a job is active and verified as becoming UA after the Makotek technician disconnected the account (i.e. Makotek tag found on drop), and then the job is NOT to be counted or scored. A comment MUST be included and PICTURE TAKEN. The Quality Control Inspector must give an explanation as to why he/she determined the job to be an Unauthorized Viewer and not a “coffee shop” disconnect.

>**Other Discrepancies** - Any discrepancy found upon QC must be fixed at time of the QC inspection. Upon completion of QC all jobs must be in 100% compliance.

## **DISCREPENCIES**

A) **Additional QC:** Discrepancies found during QC necessitate additional inspections to determine the extent and reason for the problem.

1. If 10% of the work is below standards, then **20%** of that employees work is inspected for the week.
2. If 20% of the work is below standards, then **50%** of that employees work is inspected for the week.
3. If 30% of the work is below standards, then **100%** of that employees work is inspected for the week.

B) **Pay Reduction:** Any technician that has been employed for more than 30 days and has a QC score of less than 90% for 1 week will have his/her pay decreased to Level 2. The pay reduction will be effective the next payroll week, and will be in effect for 4 weeks. (Regional and General Managers are responsible for his/her technicians pay changes.)

C) **Disciplinary Action:** The General Manager must review all jobs that were not completed to standards. Disciplinary action will be determined on a case-by-case basis. (Actions should include training, verbal or written warning, suspension, back charge and/or termination.)

## **DOCUMENTATION**

A) **Individual QC** – Documentation of field QC checks is to be separated by technician and reported on a QC Report. Copy of QC report is on the Makotek web site. Each report is to provide:

- a) Technician's Name
- b) Date(s) of QC Inspection
- c) # Jobs Inspected
- d) QC points attained and QC Score.
- e) # of UA's found and # of pictures taken

B) **Digital Photos-** Jobs to be photographed include:

- a. Any job that is not completed to specification.
- b. Any job that is found to be UA upon inspection.
- c. Plant damage that is found during inspection. Plant damage photographs should include items that present a safety issue (i.e. low hanging drop) or a security issue (severely damaged lock box)

It is not necessary to photograph jobs done correctly for QC purposes.

C) **Weekly QC Summary** – Totals by technician are to be entered into the Weekly QC Summary. The Weekly QC Summary is an excel document and is available on the Makotek web site. A single Excel file is to be used for each week of the month. The Excel file is designed to compile a Month to Date summary based on the weekly information entered.

D) **Monthly QC Summary** – Compilation of weekly totals for the month. Automatically completed from each week's data from using QC Excel workbook on the Makotek web site.

## **EMPLOYEE CABLE THEFT**

**A) Quarterly Audit:** By the end of the first month of each quarter an audit to verify all employees are authorized cable viewers must be completed. (See Employee Quality Control tab of QC workbook on Makotek web site)

**B) Billing System Verification:** Each employee, including office help, must be checked in the clients' billing system. If they have an active account, it must be recorded on the Employee Quality Control report.

**C) Field Verification:** If the employee does not have an active account with the client, the employee place of residence MUST be verified in the field as being disconnected. If the employee is an unauthorized viewer, according to company policy, the employee should be terminated immediately.

**D) Employees with Trapped Services:** If has a level of service that requires a trap (i.e. basic reception only or HSD only), a field check must be completed to verify the account is trapped.

**E) Alternate Provider:** If the employee resides outside our client's service area or subscribes to a satellite service, request employee to provide proof of their billing status.

## RECORD RETENTION

Records at the local system office must be well organized and properly safeguarded. Period to retain system records are as follows:

<b>File Type</b>	<b>Length of time to store</b>
• Payroll/Invoice Files	120 days
• Work Order Files	120 days
• QC Files	120 days
• Safety Meeting Files	120 days
• Present Employees	ongoing
• Termed Employees	2 weeks

Records should be shredded or otherwise safely discarded. Contact a vice president for approval in the unlikely event that records are needed beyond the stated time frame.

## **EVALUATION PROCEDURE**

Performance Evaluations are conducted to provide both you and your employees the opportunity to discuss job duties, identify and correct weaknesses, recognize and encourage strengths, and discuss ways to improve performance.

Performance evaluations for dispatchers are to be completed at least once a year on the 1<sup>st</sup> of March. Please send these evaluations to Linda Shaffer in the Orlando office.

The Technician Assessment is a voluntary tool for the managers to use for counseling a tech and/or to discipline a tech.

The assessment for Technicians, Evaluation for Dispatchers and the Self Evaluation for managers are attached. Please remember that these evaluations are to help the employee be the best they can be. Do not use only the performance of the week prior to the evaluation in rating an employee, use the whole year's performance and cite positive points, as well as areas that need improvement.

## Dispatch Performance Evaluation:

Name \_\_\_\_\_ Location \_\_\_\_\_ Date \_\_\_\_\_

### Ratings:

Above Expectation: Exceptional performance that consistently exceeds the requirements of the position.

At Expectation: Performance that consistently meets job requirements. Normally used to describe performance of high quality, which meets and occasionally exceeds the high standards of the company.

Below Expectation: Performance that requires improvement.

**Above   At   Below**

### Technical Knowledge

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understands and follows Collection Regulations and Collection Policies
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Monitors collector queues for aged work and terminated employee's work
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Monitors unassigned work queues for routing and aged work
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Monitors equipment locations for reconciliation and lost equipment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cancels work orders real time, restores customers services and memos accounts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Routes/Prints/ensures techs have work each day

### Productivity

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Collect technician check in and verify for accuracy
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicate any corrections on turn in to manager and technician
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complete daily check in correctly and within time frames
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Safeguard cash, equipment & receipts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enter and submit payroll workbooks and deliver 2 copies of invoice
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Weekly Time Sheet - timely and correct
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain supply of drug test forms, new hire paperwork and benefits paperwork
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Verify employee files are complete and kept up to date
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Answer office telephone and check messages

### Personal Characteristics

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Professional Appearance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dependability & Attendance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Positive/Professional Behavior and Attitude

**Comments – include goals for the next year.**

Comments:

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Manager Signature \_\_\_\_\_ Date \_\_\_\_\_

## Technician Assessment:

Name \_\_\_\_\_ Location \_\_\_\_\_ Date \_\_\_\_\_

### Ratings:

Above Expectation: Exceptional performance that consistently exceeds the requirements of the position.

At Expectation: Performance that consistently meets job requirements. Normally used to describe performance of high quality, which meets and occasionally exceeds the high standards of the company.

Below Expectation: Performance that requires improvement.

Above    At       Below

Above	At	Below	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Technical Knowledge</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ladder handling – complies with all safety requirements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintains all safety equipment as required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disconnects completed to client & Makotek standards
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complies with Privacy Act & Fair Debt Collection Practices Act

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Retention Performance</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer Contact – Face to Face
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer Contact – over the phone
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to think/respond quickly and positively in customer situations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meets Save Goals (\$ Collected, Save % & Restart Rates)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meets Equipment Collection Goals & Customer Contact Goals

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Administrative</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Daily Turn In – organized, neat, timely and correct
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Weekly Time Sheet - timely and correct
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Completes work given within appropriate time frame (no aging issues)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fills out work orders completely and accurately

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Personal Characteristics</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Professional Appearance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dependability & Attendance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Positive/Professional Behavior and Attitude

### Comments – include goals for the next year.

Comments:

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Manager Signature \_\_\_\_\_ Date \_\_\_\_\_

## Self-Performance Evaluation:

Name \_\_\_\_\_ Location \_\_\_\_\_ Date \_\_\_\_\_

### Ratings:

Above Expectation: Exceptional performance that consistently exceeds the requirements of the position.

At Expectation: Performance that consistently meets job requirements. Normally used to describe performance of high quality, which meets and occasionally exceeds the high standards of the company.

Below Expectation: Performance that requires improvement.

**Above   At   Below**

### Technical Knowledge

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Collection principles, theory, regulations and functional expertise. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Safety principles, theory, regulations and functional expertise.     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Cable plant (tap to home) knowledge and expertise.                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | PC Skills and abilities (includes spreadsheets and data bases).      |

Comments:

### Client Relations:

- |                          |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Readily obtains confidence, respect and cooperation of client.                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Concern with providing client with quality service.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Responds innovatively and constructively to client needs (i.e. recognition of new opportunities.) |

Comments:

### Supervision of Personnel:

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Effectively motivate, utilize and supervise.       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Willingly and effectively train staff.             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Facilitate and foster a positive work environment. |

Comments:

### Expression – Oral and Written:

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Effectively sell ideas and obtain acceptance of action.      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Communication with others (client, subordinates, superiors). |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Clear explanation and sound conclusion.                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Quality of written communication.                            |

Comments:

**Above   At   Below**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Productivity:**

- Assumes responsibility.
- Initiative, self-motivation and willingness to learn.
- Formulate alternative solutions to problems.
- Follow through until completion.
- Meet or beat time frame deadlines.
- Distinguish between necessary and unnecessary procedures.

Comments:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Personal Characteristics:**

- Performance under pressure.
- Ability to get along with people.
- Dependability.
- Positive and professional approach.

Comments:

**Goals and Objectives: Identify at least 2 for the next year.**

Comments:

**Other.**

Comments: