

- 5 = Outstanding
- 4 = Commendable
- 3 = Satisfactory
- 2 = Needs Improvement
- 1 = Unacceptable

Contract YR: \_\_\_\_\_  
 Quarter: \_\_\_\_\_

**APPENDIX 5. ACCOUNT EXECUTIVE ASSESSMENT FORM**

**STATE OF MARYLAND (SOM), EMPLOYEE ASSISTANCE PROGRAM (EAP)  
 ACCOUNT EXECUTIVE ASSESSMENT FORM**

The intent of this form is to evaluate the Account Managements' success as the State of Maryland Employee Assistance Program (EAP) provider.

- STEPS FOR COMPLETION**
- 1) The Contract Manager will complete ratings for areas 1 – 18.
  - 2) Ratings will reflect a score of 1 - 5 (1 completely disagree through 5 completely agree).
  - 3) Additional comments regarding Contractor compliance will be mentioned below.
  - 4) The completed assessment form will be presented to the EAP Contractor Quarterly.

		Rating 1 - 5
<b>Accessibility: Do you agree that the Employee Assistance Program Contractor:</b>		
1	Is timely and allocates appropriate time when meeting with the State.	
2	Provides the Contract Manager with alternative Contacts who are familiar with the State's needs and expectations.	
3	Demonstrates flexibility in regards to schedule changes.	
4	Clearly communicates any schedule limitations for any scheduled meetings, calls, reporting requirements, etc.	
<b>Proactive Management: Do you agree that the Employee Assistance Program Contractor:</b>		
5	Provides viable alternative strategies that meets the State's needs and requests.	
6	Actively communicates potential contractual problems and /or issues.	
7	Up to date on the State's account and interacts with the Contract Manager when necessary.	
8	Recognizes the necessity of the State's systems and their effect on system management.	
<b>Responsiveness: Do you agree that the Employee Assistance Program Contractor:</b>		
9	Responds to the State's inquiries in a timely manner.	
10	Provides thorough responses and reporting tools to the Contract Manager upon request.	
11	Follows through regarding outstanding problems, issues and other areas of concern.	
<b>Knowledge: Do you agree that the Employee Assistance Program Contractor:</b>		
12	Understands the State of Maryland EAP plan.	
13	Understands the State of Maryland's business expectations. Meets with the Contract Manager to establish needs and services expectations.	
14	Manages and develops a plan that incorporates the needs and expectations of the contract.	
15	Familiar with employee assistance program industry standards.	
16	Clearly explains quarterly reporting results.	
<b>Professionalism: Do you agree that the Employee Assistance Program Contractor:</b>		
17	Actively collaborates with the State to resolve contractual issues and concerns.	
18	Provides appropriate verbal and written communications.	
		<b>OVERALL RATING TOTAL</b>
		<b>#DIV/0!</b>
<b>COMMENTS</b>		

COMPLETED BY: \_\_\_\_\_

CONTRACT MANAGER SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

CONTRACTOR ACKNOWLEDGEMENT: \_\_\_\_\_

DATE: \_\_\_\_\_