

# **ALLENTOWN INFECTIOUS DISEASES PERFORMANCE REVIEW**

**Billing Office Manager**

<b>Name:</b> _____	<b>Job Title:</b> _____
<b>Start Date:</b> _____	_____
<b>Review Meeting with</b> _____	<b>Review Period:</b> _____ <b>To</b> _____
<b>Date Reviewed:</b> _____	<b>Overall Rating:</b> _____

## **Instructions**

Before completing this form, please read through each section carefully. Then, complete the following sections:

### **Section 1**

- Part A: Quality of Work/Knowledge of Job
- Part B: Professional Behavior – Initiative – Creativity
- Part C: Teamwork - Working Relationships
- Part D: Time Management/Organization/Productivity
- Part E: Continuing Education

### **Section 2**

**Goals, Strengths, & Development**

### **Section 3**

**Comments**

## **Performance Rating Categories and Definitions:**

<b>Category</b>	<b>Rating</b>	<b>Definition</b>
Substantially Exceeds Expectations	5	Performance that is exceptional. Performance expectations and requirements are consistently and significantly exceeded in all areas of responsibility.
Exceeds Expectations	4	Performance that exceeds performance expectations and requirements in some areas of responsibilities and meets expectations and requirements in other areas.
Meets Expectations	3	Performance that meets all expectations and requirements. Standard expectations – highlighted in yellow.
Needs Improvement to Meet Expectations	2	Performance that fails to meet expectations, standards and requirements in some area of responsibility or only meets them partially. Corrective action is required.
Fails to Meet Expectations	1	Performance which is unacceptable and below acceptable levels. Performance consistently does not meet expectations, standards, and requirements. Immediate corrective action is required.

The employee signature below acknowledges that the supervisor has met with the employee in advance of his/her review period and has discussed the relevant performance factors and/or performance objectives that he/she will be rated upon.

Employee Signature: _____	Date: _____
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**Section 1:**

**Part A: Quality of Work/Knowledge of Job**

<p>1. Manages the Billing and Collection Staff to operate department at peak efficiency.</p> <ul style="list-style-type: none"> <li>a. Completes ongoing training and education</li> <li>b. Insures resources are available</li> <li>c. Insures problem resolution with payees – carrier, patient etc.</li> <li>d. Addresses billing staff issues in professional and proactive manner.</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>2. Manages billing and collection office functions in a professional, ethical and efficient manner.</p> <ul style="list-style-type: none"> <li>a. Performs billing and collections duties for specified carriers</li> <li>b. Completes quality assurance of B&amp;C tasks               <ul style="list-style-type: none"> <li>1. Re: claims submitted, payments received, payments posted</li> <li>2. Re: Timeliness and correct manner to insure corporate cash flow</li> </ul> </li> <li>c. Understands and incorporates carrier network contracts and administration</li> <li>d. Maintains network fee schedules and office fee schedules</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>3. Human Resources – Administrative</p> <ul style="list-style-type: none"> <li>a. Assists with new employee orientation and enrollment paperwork</li> <li>b. Maintains HR Records Correspondence, Action Plan, Reprimands, Accolades</li> <li>c. Records hours, salary and payroll elements accurately and timely</li> <li>d. Manages payroll vendor relationship</li> <li>e. Coordinates payroll needs with bookkeeper/accountant</li> <li>f. Manages staff vacation schedule and PTO Banks</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>4. Human Resources – Day to Day Staffing</p> <ul style="list-style-type: none"> <li>a. Proactively manages the day to day operations of staff scheduling in accordance with guidelines set forth by management</li> <li>b. Monitors staff attendance and punctuality</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>5. Human Resources – Communication and Management</p> <ul style="list-style-type: none"> <li>a. Completes Performance Reviews with Practice Manager, works with the dynamic performance process to elicit optimal performance for each team member.</li> <li>b. Insures professional environment and the adherence of company policies and procedures.</li> <li>c. Effectively communicates with staff members and physicians</li> <li>d. Facilitates Monthly Full Staff Meeting (productive, follow through on agenda items etc)</li> <li>e. Assist management with office morale and employee retention.</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<p>6. Departmental Operations</p> <ul style="list-style-type: none"> <li>a. Assists PM in monitoring and assuring budget compliance</li> <li>b. Continually monitors office procedures and expenses for improvements and recommendation to be presented to management.</li> <li>c. Maintains office equipment records, upkeep and warranties.</li> </ul>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

Comments:

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**Part B: Professional Behavior – Initiative – Creativity**

1. Demonstrates a positive, enthusiastic attitude to patients, doctors and fellow	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
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employees.					
2. Demonstrates effective written and verbal communications with all levels – doctors, coworkers, and patients.	1	2	3	4	5
3. Develops and maintains a cooperative working relationship with other physicians, doctor’s offices, centers, hospital employees, claims managers, and A.I.D.S. personnel.	1	2	3	4	5
4. Consistently responds in a timely manner to requests	1	2	3	4	5
5. Is respectful to all A.I.D.S personnel, business associates patients, and employees	1	2	3	4	5
6. Consistently demonstrates appropriate behavior and strives to deliver high quality services.	1	2	3	4	5
7. Accepts new tasks and challenges in a positive manner	1	2	3	4	5
8. Consistently demonstrates flexibility to accommodate patient, physician, co-worker needs.	1	2	3	4	5
9. Consistently follows through with special assignments, projects, communications, and agreements by their due dates.	1	2	3	4	5
10. Works independently with minimal supervision	1	2	3	4	5
11. Maintains patient privacy and all elements of HIPAA regulations	1	2	3	4	5
12. Demonstrates good judgment in decisions and actions	1	2	3	4	5
13. Shares and implements ideas and suggestions to improve practice	1	2	3	4	5
14. Accepts and implements office changes with a positive approach	1	2	3	4	5
15. Works with office administration to insure safe work environment	1	2	3	4	5
16. Dresses appropriately according to guidelines	1	2	3	4	5

Comments:

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**Part C: Teamwork - Working Relationships**

1. Consistent, reliable and trustworthy member of the to A.I.D.S. team.	1	2	3	4	5
2. Assists co-workers to handle work over-flow when necessary.	1	2	3	4	5
3. Consistently demonstrates behavior that fosters team growth and company goals.	1	2	3	4	5
4. Has good attendance, punctuality and manages PTO time proactively	1	2	3	4	5
5. Is a reliable dependable member of the A.I.D.S. Team	1	2	3	4	5
6. Participates in positive communication that improves working environment	1	2	3	4	5

Comments:

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**Part D: Time Management/Organization/Productivity**

1. Arrives on time and fully prepared for workday	1	2	3	4	5
2. Paperwork is processed and completed by scheduled deadlines.	1	2	3	4	5
3. Files and Binders are organized and complete per protocol.	1	2	3	4	5
4. Proofreads work to insure accuracy and completeness	1	2	3	4	5
5. Demonstrates efficiency in planning doctor’s appointments.	1	2	3	4	5
6. Efficiently completes the day’s scheduled tasks.	1	2	3	4	5
7. Handles multitasking and “unscheduled” changes in stride	1	2	3	4	5
8. Consistently completes assigned daily tasks without assistance from others	1	2	3	4	5
9. Consistently follows through with special assignments, projects, communications, and agreements by their due dates.	1	2	3	4	5
10. Uses downtime wisely – catch up, assists others, special projects etc.	1	2	3	4	5
11. Uses technology (ie, computer, computer software,, phones, faxes, copy machines) effectively and efficiently	1	2	3	4	5

Comments:

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**Part E: Continuing Education**

1. Attended and presented to the group at least one continuing education seminar a year.	1	2	3	4	5
2. Attends position appropriate meetings, reads newsletters and exchanges information with office staff. Assists in the implementation of changes as directed by Practice Manager.	1	2	3	4	5
3. Continually strives to learn and apply new ideas, skills, and concepts.	1	2	3	4	5

Comments:

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**OVERALL EVALUATION**

**TOTAL SCORE**

(Please check one)

- Significant improvement required; usually does not meet position requirements
- Usually meets position requirements; may occasionally fall below standards
- Consistently meets position requirements and standards
- Consistently meets position requirements and standards; frequently exceeds standards
- Exceptional performance; consistently exceed position requirements and standards

**Section 2: Strengths and Development**

**Strengths \ Achievements**

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**Development Opportunities**

**Area for Development #1:**

**Action Steps with Target Dates:**

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**Area for Development #2:**

**Action Steps with Target Dates:**

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**Area for Development #3:**

**Action Steps with Target Dates:**

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**Section 3: Comments**

**Performance Review Comments**

Record any significant comments brought up during the performance review that is not recorded elsewhere on this form.

**Employee Comments**

**Supervisor Comments**

**Signatures**

The employee signature acknowledges that the employee has received the performance evaluation and that the evaluation has been discussed with the employee. The employee's signature indicates neither agreement nor disagreement with the appraisal content and rating.

Employee Signature:

Date:

Rating Supervisor Signature:

Date:

Next Level of Management's Signature:

Date: