

# **ALLENTOWN INFECTIOUS DISEASES PERFORMANCE REVIEW**

**Billing Specialist**

<b>Name:</b> _____	<b>Job Title:</b> _____
<b>Start Date:</b> _____	<b>Supervisor:</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: _____
---------------------------	-------------

### **Section 1:**

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

1. Negotiates the billing software system efficiently to enable patient charge entry, posting and collection tasks.	1	2	3	4	5
2. Effectively applies knowledge of medical terminology, ICD, CPT codes to complete daily billing entries.	1	2	3	4	5
3. Independently researches unknown or new diagnoses and apply information to coding	1	2	3	4	5
4. Applies known insurance guidelines to insure clean claim submission (ie data entry placement – authorization code/ref on file).	1	2	3	4	5
5. Corrects denied submission and denied claims in a timely manner.	1	2	3	4	5
6. Institutes policy procedure changes with guidance of Billing Manager to avoid future denials. Assists in the training and communication to staff accordingly.	1	2	3	4	5
7. Submits clean claims electronically and by paper claims efficiently and effectively according to office guidelines. a. Maintains in house filing of claim submissions in an orderly and efficient manner, assist in retrieval of records as needed.	1	2	3	4	5
8. Proactively maintains guidelines and system maintenance for clean claim per carrier as assigned a. Responsible for reading, understanding and the application of payer changes and communications and disseminates payer information to Billing Team. b. Inputs information as directed by Senior Coder or Billing Manager regarding changes and updates into the software application	1	2	3	4	5
9. Receives payment and post checks into the system in a timely manner as guidelines dictate (daily). a. Creates daily deposits, file EOBs	1	2	3	4	5
10. Works effectively with Billing Manager to complete collection management a. Proactively investigates overpayment, underpayment, non-payment insurance verification, Contact Carrier, Contact patient as appropriate.	1	2	3	4	5
11. Has established and maintains a relationship with carrier representatives in order to resolve issue and obtain information.	1	2	3	4	5
12. Administrates patient statement management effectively and with positive payment results.	1	2	3	4	5
13. Manages in house collection efforts with accuracy, efficiency and results. Uses the open item report and aging status as tolls and direction to complete this task.	1	2	3	4	5
14. Manages the collection agency vendor day-to-day relationship and coordination.	1	2	3	4	5
15. Efficiently and accurately creates the inpatient schedule and billing record cards for the doctors. a. Create daily schedule cards b. Collects and processes daily inpatient billing records c. Maintains active inpatient billing records according to guidelines	1	2	3	4	5

Comments:

---



---



---



---



---

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

1. Demonstrates a positive, enthusiastic attitude to patients, doctors and fellow employees.	1	2	3	4	5
--	---	---	---	---	---

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:

---



---



---



---

**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:

---



---



---



---

**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:

---



---

**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 network and carrier meetings, reads carriers/network newsletters and exchanges information with Billing Manager and Billing Staff. Implements necessary changes as directed by Billing Manager.	1	2	3	4	5
3. Continually strives to learn and apply new ideas, skills, and concepts.	1	2	3	4	5

Comments:

---



---

**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**

--

**Development Opportunities**

**Area for Development #1:**

**Action Steps with Target Dates:**

--

**Area for Development #2:**

**Action Steps with Target Dates:**

--

**Area for Development #3:**

**Action Steps with Target Dates:**

--

**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: