

ALLENTOWN INFECTIOUS DISEASES PERFORMANCE REVIEW

Office Receptionist/Administrator

Name: _____	Job Title: _____
Start Date: _____	Supervisor: _____
Review Meeting with _____	Review Period: _____ To _____
Date Reviewed: _____	Overall Rating: _____

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:

Category	Rating	Definition
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

1. Greet patients in a professional and caring manner while performing the check in process in a proactive and efficient manner following the office guidelines.	1	2	3	4	5
2. Assists in the efficiency of the patient put through processes by communicating patient arrive to other team members (doctors, MA etc)	1	2	3	4	5
3. Operates the switchboard to route incoming calls and place outgoing calls in an efficient, accurate and professional manner. a. Receives, completes, distributes answering service sign off.	1	2	3	4	5
4. Takes accurate complete messages and delivers messages in a timely fashion, using judgment and office guidelines to insure proactive communication between team members.	1	2	3	4	5
5. Greets vendors, customers, job applicants, and other visitors, representing A.I.D.S. in a positive professional manner. a. Greets and assists students/residents with scheduling/physician coordination.	1	2	3	4	5
6. Opens and Distributes mail in a timely and accurate manner.	1	2	3	4	5
7. Completes new inpatient intake, communication and system data entry in a timely, accurate and efficient manner.	1	2	3	4	5
8. Pleasantly and proactively Assists in handling a wide variety of situations and conflicts involving the clerical and administrative function of the office. a. Assist with physicians' personal schedule. b. Responsible for confidential and time sensitive material. c. Acts as the practice historian. d. Offers opinion and suggestions based on experience and expertise to Mgt.	1	2	3	4	5
9. Manages the quality assurance and training of coding functions. a. Work with all departments to manage patient information and proper coding of diagnosis and billing codes b. Trains new staff regarding proper ICD and CPT coding c. Provides staff with updates and training as needed	1	2	3	4	5
10. Maintains and records business transactions in accordance with generally accepted accounting principles and corporate guidelines. a. Balances ledgers and prepares reports as requested. b. Works with Practice manager regarding vendor management and cost containment.	1	2	3	4	5
11. Organizes and orders office supplies. Insures office wide communication and coordination of existing inventory, requests and cost effective purchases.	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					
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 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:

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:

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: