

Patient Account Administrator Performance Packet

from

**Standard Operating Procedures
for All Dentists**
(5th edition)

Marsha Freeman, M.A.



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(5th edition)

Created to support Marsha Freeman's article
"Using SOPs to Manage Your Accounts Receivable"
published in **Insurance Solutions Newsletter**, March/April 2007 issue.

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Specialized Standard Operating Procedures for Orthodontists
Specialized Standard Operating Procedures for Periodontists
Risk Management for Dentists
Get Paid for Your Services
Designing Your Perfect Dental Practice

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Specialized Standard Operating Procedures for Primary Care Physicians
Specialized Standard Operating Procedures for Pediatricians
Specialized Standard Operating Procedures for OBGYNs
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The purpose of this book is educational.

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PERFORMANCE AGREEMENT: Patient Account Administrator
(paactadm.doc)

INTRODUCTION AND ACKNOWLEDGMENT

Name: _____

Date of Hire: _____ Starting Salary: \$ _____ per _____

[Doctor/Practice Name] provides all of our clients quality dental care and exceptional, warm, and caring patient/customer service. We believe that each patient deserves the best oral health care available in today's dental industry.

This PERFORMANCE AGREEMENT outlines how we carry on this tradition and continue to maintain a financially successful and professionally fulfilling dental practice.

Our Standards of Service

1. We seek to develop a partnership with our patients in creating a higher level of health.
2. We are dedicated to maintaining our education and our professionalism at the highest level.
3. We understand that the achievements of our organization are the result of building teamwork with those we serve and among ourselves.
4. We will share information with our patients so they can make educated and comfortable decisions about their oral health care.
5. We believe that only through providing care to others in a value system that is compatible with our own can we achieve harmony in our lives.

In addition to these company-wide standards, as an employee you also have individual standards for your personal area of responsibility, which you will find outlined in the PERFORMANCE STANDARDS attached. How you maintain these standards will determine your future with our practice.

You will find the following forms provided in this PERFORMANCE AGREEMENT package:

- ◆ Introduction and Acknowledgment
- ◆ Performance Standards
- ◆ Overall Evaluation
- ◆ Position Summary
- ◆ Performance Plan

I have reviewed this position description and understand that I am expected to abide by these standards as outlined. I understand that I will be evaluated on these standards after the three-month orientation period, as needed throughout the year, and annually at the anniversary date of my employment. I further understand that this agreement does not represent an employment contract; employment with this practice is not for any specified term; employment can be voluntarily or involuntarily terminated "at-will," with or without cause or notice at any time.

EMPLOYEE SIGNATURE _____ DATE _____

MANAGER SIGNATURE _____ DATE _____

POSITION SUMMARY

NAME: _____

JOB CLASSIFICATION: Non-exempt **SUPERVISOR:** _____

WORK SCHEDULE: Prior to employment, you will be notified of your actual hours and work schedule. This schedule is subject to change (i.e., daily hours increased or decreased) according to the needs of the practice.

POSITION SUMMARY: Performs a variety of reception and secretarial duties while promoting a safe environment of minimal stress. Responsible for checking out patients in a warm and friendly manner. Assists the patient in scheduling any procedures or follow-up visits and provides any necessary instructions to the patient. Answers the telephone, collects copayments, and provides a receipt for payment to patients. Performs a variety of insurance and data entry duties for our patients in a cheerful and efficient manner. Generates and maintains current patient and insurance billing. Maintains patient account information.

PHYSICAL REQUIREMENTS: Must be able to meet the physical requirements and demands of an active position, including but not limited to: extended duration of standing, walking, stooping, bending and sitting; manual dexterity; good eye-hand coordination; visual abilities (depth perception, ocular focus, close vision, color vision, and peripheral vision), and adequate hearing to perform daily work. Must be able to adjust physically and emotionally to a spontaneous, fast-paced and hectic environment.

HAZARDS: The dental office environment may result in employees being exposed to toxic chemicals, radiation, potentially infectious materials, and increased noise level.

JOB SPECIFICATIONS

dental or business experience
high school graduate
CPR and first aid

COMPETENCIES

exceptional interpersonal skills
ability to work independently
ability to handle conflict and get along with people
ability to maintain outgoing, friendly attitude with patients and staff even under pressure
ability to work with interruptions and to manage multiple priorities
ability to speak, understand, and write fluent and grammatically correct English
knowledge of correct grammar, spelling and punctuation
knowledge of organizational filing procedures and systems
proficiency in alphabetizing, spelling, and business math
ability to write legibly and work with numbers

POSITION SUMMARY *(continued)*

COMPETENCIES *(continued)*

ability to complete tasks within time frame

ability to satisfactorily perform essential duties listed in the Position Task Inventory

SKILLS

calculator

typewriter

computer

copier

fax machine

postage meter

multiple phone lines

PERFORMANCE STANDARDS

Performance Standards

Rating
Employee Supervisor

1. Consistently recognizes the needs and desires of other people (doctor, staff, patients, and business associates). Treats them with respect and courtesy. Inspires respect and confidence.	_____	_____
2. Provides a motivational environment by encouraging and supporting individual growth and development as a means to superior teamwork and greater success.	_____	_____
3. Appropriately uses conflict resolution and problem-solving skills in managing interpersonal conflict, patient complaints, and other discord.	_____	_____
4. Effectively manages own time and workspace to accomplish individual and practice objectives.	_____	_____
5. Consistently keeps workspace and department neat and orderly.	_____	_____
6. Cheerfully and without hesitation assists other departments and performs backup duties as outlined on the Position Task Inventory sheet as needed and requested.	_____	_____
7. Appropriately and conscientiously uses office supplies.	_____	_____
8. Consistently maintains professional education in relative areas.	_____	_____
9. Maintains productive and efficient use of company time, demonstrating good attendance, on-time arrivals, and completed work shifts.	_____	_____
10. Constantly aware of total quality management and recommends improvements when and where needed.	_____	_____
11. Immediately reports any unsafe working conditions.	_____	_____
12. Adheres to office policies outlined in the Employee Handbook regarding code of conduct, attendance, appearance, administrative requests, and confidentiality.	_____	_____
13. Consistently and accurately performs all tasks as outlined in SOPs and the Position Task Inventory sheet. Promptly and thoroughly corrects all errors.	_____	_____

(1) did not achieve expectations	(2) partially achieved expectations
(3) fully achieved expectations	(4) exceeded expectations

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PERFORMANCE STANDARDS *(continued)*

Performance Standards

Rating
Employee Supervisor

- | | | |
|--|-------|-------|
| 14. Communicates clearly and tactfully with patients and parents of minor children, following practice philosophy guidelines and verbal as outlined in SOPs for specific circumstances. | _____ | _____ |
| 15. Responds promptly to inquiries and requests from the patients, staff, doctor, and referring offices. | _____ | _____ |
| 16. Accurately maintains patient records and charts to ensure easy retrieval and complete documentation of all patient treatment and transactions. | _____ | _____ |
| 17. Participates fully in staff development through morning huddles, staff meetings, continuing education courses, and evaluations. | _____ | _____ |
| 18. Promotes team cohesiveness by interacting with team members using common courtesy, active listening skills, respect, and non-judgmental attitude. | _____ | _____ |
| 19. Promptly and warmly greets patients when checking out from our office, following office guidelines for efficient checkout once the visit is completed. | _____ | _____ |
| 20. Answers the telephone by the third ring and, using a warm friendly voice, identifies the office and self. Accurately assesses and meets the needs of the caller. Accurately completes telephone messages, voice mail transfers, and chart documentation. | _____ | _____ |
| 21. Schedules all office appointments according to office guidelines to ensure smooth patient flow and care. | _____ | _____ |
| 22. Accurately maintains patient appointment schedules to ensure complete documentation of all appointment changes. | _____ | _____ |
| 23. Tactfully and effectively discusses finances with patients, providing written estimates, insurance benefit information, and financial options. Reaches and documents financial arrangements prior to treatment. | _____ | _____ |
| 24. Tactfully collects money from patients on the day of the visit, negotiating arrangements as needed, providing a receipt, and completing all necessary documentation and posting. | _____ | _____ |

(1) did not achieve expectations	(2) partially achieved expectations
(3) fully achieved expectations	(4) exceeded expectations

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I have reviewed this position description and understand that I am expected to abide by these standards as outlined. I understand that I will be evaluated on these standards after the three-month orientation period, as needed throughout the year, and annually at the anniversary date of my employment. I further understand that this agreement does not represent an employment contract; employment with this practice is not for any specified term; employment can be voluntarily or involuntarily terminated “at-will,” with or without cause or notice at any time.

Review completed by: _____
Signature/Date

- Supervisor Administrator Doctor Other _____

Employee: _____ **Next Review Date:** _____
Signature/Date

OVERALL EVALUATION

Check the rating level that best describes this employee's overall performance since their last review.

(1) Did Not Achieve Expectations as described in the following Performance Statements:
#’s: _____
Improvement needed in these areas by: _____ or _____

(2) Partially Achieved Expectations as described in the following Performance Statements:
#’s: _____
Improvement needed in these areas by: _____ or _____

(3) Fully Achieved Expectations as described in the following Performance Statements:
#’s: _____

(4) Exceeded Expectations as described in the following Performance Statements:
#’s: _____

SUPERVISOR COMMENTS

Comment on how the overall evaluation was determined and the effectiveness of the evaluation session. Clearly document if the employee’s job is in jeopardy and specifically state what she/he must correct, and by when, to keep their job.

PERFORMANCE PLAN

Focus on two or three areas that need improvement, particularly those performance factors for which the employee received less than a rating of 3. Develop a plan with the employee that allows for additional training, feedback, or change in routine that will lead to the employee's success in fully achieving performance expectations.

Date	Concern	Action Plan	By When	Result

EMPLOYEE COMMENTS

The employee may provide comments on the performance review and plan in the space provided below.

SIGNATURES

I have reviewed this document, discussed its contents with my supervisor, and had the opportunity to make written comments. My signature indicates that I have been advised of my performance status and does not necessarily imply that I agree with this evaluation.

Review completed by: _____
Signature/Date

- Supervisor Administrator Doctor Other _____

Employee: _____
Signature/Date

Next Review Date: _____

Task Inventory: Business Department / 2

Task	Primary	Backup	Shared
Coordinates With Finance Company			
Checks Out Patients			
Presents Treatment Plan And Answers Questions			
Coordinates With Referring Offices			
Schedules Appointments With Specialists			
Sends Thank-You Notes			
Sends Referral Letters			
Sends Welcome Packets			
Sends Other Correspondence			
Enters Patient Information			
Posts Treatment And Over-The-Counter Payments			
Posts Patients Mail-In Payments			
Posts Insurance Payments			
Opens And Distributes Mail			
Processes Credit Card Payments			
Prepares Daily Deposit Slip			
Makes Bank Deposit			
Balances End Of Day			
Prints Daily Reports			
Prepares Pre-Authorizations			
Submits Manual Insurance Claims			
Submits Electronic Claims			
Duplicates X-Rays			
Monitors Insurance Claims			
Notifies Patients Of Pre-Authorization Receipt			
Prepares And Maintains Charts			
Files Charts, X-Rays, EOBs, Etc			
Purges Charts And Maintains Filing System			
Conducts Chart Audits			
Follows Up On Treatment Pending			
Works Recall Report And Makes Phone Calls			
Mails Recall Cards			
Is Responsible For Accounts Receivable			
Generates Necessary Reports			
Prepares Statements			
Stuffs And Mails Statements			
Takes Account Calls			
Works Delinquent Accounts			
Makes Collection Calls And Letters			
Generates Month-End And Management Reports			
Maintains Computer System			
Makes Computer Back Up			
Maintains Computer System			
Maintains Insurance And Fee Schedules			

Task Inventory: Business Department / 3

Task	Primary	Backup	Shared
Maintains Office Equipment			
Orders Front Office Supplies			
Processes Invoices			
Pays Bills			
Resolves Difficult Patient Situations			
Cleans And Maintains Reception Area			
Monitors And Cleans Restrooms			
Maintains Magazine Subscriptions			
Waters Plants			
Feeds Fish			
Empties Trash			
Vacuums			
Keeps Business Area Clean And Clutter Free			
Trains Staff When Asked			
Puts Away Supplies			
Other Responsibilities:			
Attends And Participates In Staff And Team Meetings			
Uses Conflict And Resolution Skills To Get Along			
Serves Patients With Kindness And Empathy			
Attends Continuing Education Classes			
Stays Up To Date By Reading Current Literature			
Maintains All Licenses			
Collaborates With The Back Office And Hygienist For Smooth Running Days			
Looks For Ways To Assist Team Members			
Uses Tact And Discretion In All Discussions			
Listens And Responds Professionally To All Feedback			
Adheres To All HIPAA Guidelines			
Complies With All Other Regulatory Policies			
Aggressively Follows All OSHA And Center For Disease Control Guidelines			
Assists The Business Department In All Areas As Often As Possible			
Seeks Out Opportunities To Cross Train And Become More Proficient In Other Areas			
Maintains Confidentiality In All Matters, Especially Regarding Patients			

Standard Operating Procedures for All Dentists

Marsha Freeman

(contents5th.doc)

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Refusal of Treatment	refusetx.doc
Return to Work/School Note	rtnwrk.doc
Sample Memos	memo1.doc
SOPs Worksheet	sopwk.doc
Specialty Referral form	specref.doc
Strategy and Goal Sheets	stragoal.doc
Team Survey	teams.doc
Treatment Estimate	txest.doc
X-Ray Duplication Request	xraydupe.doc
X-Ray Liability Release	xrliabrls.doc