
PERFORMANCE AGREEMENT: Patient Treatment Coordinator

(paptcoor.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 general reception, secretarial, insurance, and data entry duties while promoting a safe environment of minimal stress. Answers the telephone, schedules appointments, assists with patient finances, maintains patient records, and coordinates patient flow.

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 human relations skills
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 English
knowledge of correct grammar, spelling, and punctuation
knowledge of organizational filing procedures and systems
proficiency in alphabetizing and spelling
ability to write legibly and work with numbers
ability to meet deadlines
ability to work unsupervised
ability to satisfactorily perform essential duties listed in the Position Task Inventory

SKILLS

calculator	fax machine	postage meter
typewriter	multiple phone lines	copier
computer	verifone for VISA/M/C	

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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

PERFORMANCE STANDARDS *(continued)*

<i>Performance Standards</i>	<i>Rating</i> <u>Employee</u> <u>Supervisor</u>	
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 as welcomed guests to our office, following office guidelines for efficient check in and transfer to clinical staff.	_____	_____
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 emergency message slips, message memos, and chart documentation.	_____	_____
21. Schedules all general appointments as outlined in SOPs to ensure a smooth patient flow and production goals are met.	_____	_____
22. Tactfully and effectively discusses finances with patients, providing written estimates, insurance benefit information, and financial options. Reaches and documents financial arrangements prior to treatment.	_____	_____
23. 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.	_____	_____
24. Prepared for the next day by timely and through confirmation of appointments, accurate typing of the schedule, and chart preparation.	_____	_____

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

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PERFORMANCE STANDARDS *(continued)*

<i>Performance Standards</i>	<i>Rating</i>	
	<u>Employee</u>	<u>Supervisor</u>
25. Consistently monitors and follows up on no-shows, cancellations, and treatment still needed.	_____	_____
26. Follows office procedure for patient referrals and record transfers to other dental offices. Cheerfully and promptly assists patients in making appointments with specialists.	_____	_____
27. Actively promotes practice by following guidelines for welcome letters and educational handouts.	_____	_____
28. Maintains the clean and uncluttered appearance of the reception and front office area.	_____	_____

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

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Review completed by: _____
Signature/Date

Supervisor Administrator Doctor Other _____

Employee: _____
Signature/Date

Next Review 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: _____