

ALLENTOWN INFECTIOUS DISEASES PERFORMANCE REVIEW

Medical Assistant

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 which is exceptional. Performance expectations and requirements are consistently and significantly exceeded in all areas of responsibility.
Exceeds Expectations	4	Performance which exceeds performance expectations and requirements in some areas of responsibilities and meets expectations and requirements in other areas.
Meets Expectations	3	Performance which meets all expectations and requirements. Standard expectations – highlighted in yellow.
Needs Improvement to Meet Expectations	2	Performance which 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. Demonstrates comprehensive understanding of the unique challenges of the A.I.D.S. Office.	1	2	3	4	5
2. Accepts and processes calls from Patients, Doctors, Labs, Home Care, Other MD Offices, Insurance Company, Pharmacy, Other hospitals/Urgent Care/SNFs centers, Diagnostic Centers. a. Completes necessary phone triage follow through events and documentation b. Assist with Physician Communication to multiple parties (patients, doctors, diagnostic centers etc.)	1	2	3	4	5
3. Processes new patient referrals – HFU, Travel and Outpatient referrals a. Out patient Provides information, patient set up of appt, follows through with appropriate paperwork b. Accepts new Inpatient Hospital Consults - Obtains information on follows through with communication to physician and office staff.	1	2	3	4	5
4. Prioritizes Call Triage Urgent vs. Non Urgent calls/information and processes accordingly.	1	2	3	4	5
5. Greets Patient and performs patient prep a. Take vital and obtain chief complaints and document same b. Verify medication, allergies and any recent diagnostic studies c. Verify demographics and other treating physicians d. Responsible to insure patient signs HIPPA forms e. Prep patients for exam (unwrap wounds, gown patient)	1	2	3	4	5
6. Monitors patient for comfort and safety until physician arrives	1	2	3	4	5
7. Assists with patient care as directed by physician. a. Rewrap wounds, assist with procedures, administer injections, patient education	1	2	3	4	5
8. Completes Follow up requests - (Appointments, tests, IV orders, follow up visits)	1	2	3	4	5
9. Monitors and completes efficient patient put through process -waiting room->MD	1	2	3	4	5
10. Schedules appointments and diagnostic studies as well as IV procedures. Assists in the management of IV therapy with IV Fusion Company and home care.	1	2	3	4	5
11. Acts as liaison between hospital and ID physician for inpatient care. Assist Physicians with Patient Research - Obtaining Past Medical History from home care, hospital, microbiology, other offices	1	2	3	4	5
12. Completes Patient Chart Management. Insures all charts are prepped for next day. Pulls information from all sources, organize/build chart in chronological order. Researches any outstanding issues. Past appointment study follow through items. Rechecks information for accuracy and present-ability. (spelling, physician, computer notation) Receiving Office Correspondence (Fax/Mail/Interoffice) - (Labs, xrays, office notes, requests for records, Rx refills, misc)	1	2	3	4	5
13.Process requests as required according to priority	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, 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 E: 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. Charts 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 keeps the day's scheduled appointments on time and moving.	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 D: Continuing Education

1. Attended and presented to the group at least one continuing education seminar a year.	1	2	3	4	5
2. Meets state licensure requirements and CPR certification.	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: