Chart

Description automatically generated

EMPLOYEE PERFORMANCE REVIEW

Business Administrator

Employee Name: Date:

Reviewer Name/Title: Period of Review:

Please complete this form carefully and thoroughly, remember its purpose is to:

* Provide objective criteria for a Personnel Performance Evaluation on a standard basis within Believe Therapies, LLC.
* Compel an examination of all individual traits affecting employee performance.
* Help to support conclusions and recommendations for positions and compensation improvements.
* Produce a fair evaluation of an employee.
* Allow the company to gather feedback from its employees on company operations, management performance, communication, growth and goals.

YEARLY STATISTIC ANALYSIS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Advanced Schedule | Total Cancels and No Shows | Percentage of Arrival | Referrals to New Patients | Staffing Expenses |
| BCS | **SELECT** | **SELECT** | **SELECT** | **SELECT** | **SELECT** |
| HUNTS | **SELECT** | **SELECT** | **SELECT** | **SELECT** | **SELECT** |
|  | **Auth RCVD/Auth REQ** | **Billed Out** | **AR % Maintained** | **Gross Income** | **Payroll EXP/Charge** |
| BCS | **SELECT** | **SELECT** | **SELECT** | **SELECT** | **SELECT** |
| HUNTS | **SELECT** | **SELECT** | **SELECT** | **SELECT** | **SELECT** |

DIVISION 1

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff Corrections:** Ensures the process for all staff corrections and terminations of staff members occur in such a way that allows for the company to flow efficiently and smoothly. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Recruitment and Retention:** Ensures timely recruitment of potential staff and high employee retention of current staff members to increase company’s stable and productive staff. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Hatting:** Ensures every member of the company is onboarded and hatted in entirety to produce communicative and productive staff. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Compliance:** Ensures company maintains compliance with federal, state, and local employment laws and regulations. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

DIVISION 2

|  |  |  |  |
| --- | --- | --- | --- |
| **HIPAA Security:** Ensure company policies and procedures are current on HIPAA laws and regulation. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Scheduling:** Ensures company scheduling policies and procedures are efficient to allow for maximum production. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Internal/External Communication:** Ensure all internal and external communication of the company flow smoothly and efficiently, producing clients who maintain excellent communications. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Charts:** Ensures all client charts are kept comprehensive and with accurate information to produce effective flow of client information for the company. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Authorizations:** Ensures all policies and procedures to obtain authorization is maintained to deliver effective and efficient treatments to clients. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Intake:**  Ensures all policies and procedures effectively convert referrals into evaluations to increase new clients for the clinics. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

DIVISION 3

|  |  |  |  |
| --- | --- | --- | --- |
| **Billing:** Ensures all policies and procedures maximize timely and accurate claims submittal with the greatest payment possible. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Collections:** Ensure all policies and procedures lead to entire collection either from insurance company or client on all claims submitted. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- |
| **Payroll:** Ensuring all policies and procedures lead to timely and accurate processing of employees paychecks by collecting and verifying all payroll data and timesheets. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Disbursements:** Ensuring all policies and procedures lead to all bills paid to result of pleased creditors. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- |
| **Purchasing and Supplies:** Ensure all policies and procedures lead to effective submission, approval, and collation of all purchase orders to purchase and distribute all materials, goods, and supplies needed. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Financial Stability:** Ensure all policies and procedures lead to all money collected for services, with income great than expenses, plus reserves accumulated. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

LEADERSHIP

|  |  |  |  |
| --- | --- | --- | --- |
| **Problem Solving:** Initiative to develop innovative problem-solving techniques. Being resourceful and practical with decision making. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- |
| **Initiative and Creativity:** The ability to plan work and to go ahead with a task without being told every detail and the ability to make constructive suggestions. Stays updated on company news, reading all company newsletters, and making a point to attend all trainings, interacting and participating in a progressive manner. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Judgement:** The extent to which the employee makes decisions which are sound. Ability to base decision on fact rather than emotion. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- |
| **Attendance & Reliability:** Ensuring attendance according to the Employee Handbook, not misusing or abusing time off or sick time; conforming to scheduled work hours. Showing reliability and dependability consistently so a sense of stability may be established. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Time Management/Organization:** Organizing time effectively while being considerate of others time and their responsibilities. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Accepting New/Novel Tasks:**  The employee’s ability to complete additional tasks assigned to the in a timely manner, with a positive attitude for learning. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- |
| **Leadership:** Leads by example. Finds realistic solutions and resolves conflict. Brings out the best in team members and is supportive to others. Meets problems head on and acts professionally to resolve them. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Management Skills:** The employee is able to engage others, either equals or those he/she is managing to mobilize and complete tasks effectively and efficiently, with a positive attitude and with the feeling of support and team. Has a universal understanding of the company policies; not only current division, but all other divisions and their correlating statistics. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **ANNUAL PERFORMANCE REVIEW**  Business Administrator | | | | | | | |
| EMPLOYEE INFORMATION | | | | | | | |
| **Employee Name** |  | | **Position Title** | | |  | |
|  | | | | | | | |
| **Review Period** |  | | **Date of Review** | | |  | |
|  | | | | | | | |
| **Division 1** | | **Division 2** | | **Division 3** | | | **Leadership** |
| * **\_\_/5** items met or exceeded expectations | | * **\_\_/5** items met or exceeded expectations | | * **\_\_/4** items met or exceeded expectations | | | * **\_\_/8** items met or exceeded expectations |
| **Performance Summary** | | | | | | | |
|  | | | | | | | |
| **Goals / Targets** | | | | | | | |
|  | | | | | | | |
| **Employee Comments** | | |  | | **Reviewer Comments** | | |
|  | | | **SELECT THE APPROPRIATE OPTION:**   * Employee IS ELIGIBLE for the annual raise of \_\_\_\_\_\_\_\_\_\_%. * Employee is NOT ELIGIBLE for the annual raise. | | |
| **Employee Signature:** | | | **Reviewer Signature:** | | |