Chart

Description automatically generated

EMPLOYEE PERFORMANCE REVIEW

Clinical 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 4

|  |  |  |  |
| --- | --- | --- | --- |
| **Therapy Treatment:** Ensures quality treatment programs that lead to highly satisfied clients who complete their full treatment programs. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Documentation:** Ensures company policies and procedures produce well documented treatment sessions that are completed efficiently. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Note Completion:** Ensures policies and procedures lead to completion of treatment documentation in a timely manner to maintain cash flow. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Infection Control:** Ensures all policies and procedures lead to effective infection control and cleanliness of the clinic to provide services in a safe and clean environment. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Program Development:** Ensures quality program development allows for continued growth of the clinic and meets the needs of the clients served. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

DIVISION 5

|  |  |  |  |
| --- | --- | --- | --- |
| **Chart Reviews:** Ensures policies and procedures that lead to effective chart reviews to maintain accreditation requirements and produce effective documentation. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Internal Continuing Education:** Ensures effective internal continuing education of staff members that lead to highly educated staff members. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff Training:** Ensures comprehensive staff training that lead to highly productive staff members who perform job duties with highest standards. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Policy Log:** Ensures a easily accessible and comprehensive policy log is kept accurate and up to date that leads to highly educated staff members. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff Morale:**  Ensures all policies and procedures encourage high staff morale and lead to positive, highly productive staff members. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

DIVISION 6

|  |  |  |  |
| --- | --- | --- | --- |
| **Patient Care Coordination:** Ensures all policies and procedures develop and maintain relationships with referral sources leading to an abundance of appropriate referrals. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Promotion:** Ensure quality promotion out that is targeted to referral sources and client’s wants and needs leading to an increase of promotion in. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Community Events:** Ensuring quality and economical community involvement leading to a widely exposed and profitable image in the community. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Website Development:** Ensures website is up to date and comprehensive leading to a highly exposed image. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Social Media Presence:** Ensures social media presence is highly active and targeted to our clients wants and needs leading to increased client referrals. | | | |
| 1  BELOW  EXPECTATIONS | 2  MEETS  EXPECTATIONS | 3  EXCEEDS  EXPECTATIONS | Rating: **SELECT RATING**  Comments: |

|  |  |  |  |
| --- | --- | --- | --- |
| **Material Development:** Ensures quality and effective material development that leads to highly educated referral sources and clients. | | | |
| 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: |

|  |  |  |  |
| --- | --- | --- | --- |
| **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: |

|  |  |  |  |
| --- | --- | --- | --- |
| **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:** | | |