

**FRONT DESK
Annual/Bi-Annual Employee Review**



Employee Name: DOLLY PARTON

Hire Date: 10/21/2021

Last Raise: 07/11/2022

Last Review: 90 Day Review

Date Review: 12/10/2022

- 1. Front Desk Audit: See Attached
- 2. Peer Review: See Attached
- 3. Small Healthcare Team Feedback: See Attached
- 4. Self-Evaluation: See Attached

Tardiness/Absenteeism:

Absences: 04/02/22

Tardies: 01/07/22 (2 hrs, 51 min), 03/27/22 (1 min), 09/14/22 (1 min), 12/12/22 (2 hrs)

Manger Scoring:

Rating between 0-4 4=Always 3=Very often 2=Occasionally 1=Rarely 0=Never

Initiative: 4 – Always willing to step up and learn new skills/take care of tasks to make sure the clinic flows smoothly.

Attitude: 4 – You always have such an uplifting attitude. Even when things seem stressful or overwhelming, you have a smile on.

Patient Service: 4 – You do a great job with making sure the patient is taken care of. You are kind and understanding with all situations presented to you.

Quality Of Work: 4 – Several comments have been made by coworkers how diligent and thorough you are with your work. I myself have seen it first-hand. You get tasks done in a timely manner, and if you are unable to complete something you always make sure to leave a detailed list of what needs to be followed up on and or done first thing the following day.

Total Score: 16

Areas of Growth: Try not to overthink things so much. Give yourself more credit. You are doing a fantastic job!

Employee Signature: _____ Date: _____

Manager Signature: _____ Date: _____

FRONT DESK AUDIT

Patient	Insurance	Ins.	CC	Registration	Cell	Boxes	Drivers	Insurance	Penny	What should	What was			
	Active	Verified?	CC on file	consent	Forms	Pharmacy	Phone	Email	Checked	License	Card	Voided	have been taken	taken
6/1/2022														
PT1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$150.00	\$150.00
PT2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$50.00	\$50.00
6/13/2022														
PT3	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$25.00	\$25.00
PT4	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
8/13/2022														
PT5	⊘	⊘	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$40.00	\$40.00
PT6	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
9/10/2022														
PT7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
PT8	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
9/14/2022														
PT9	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$155.00	\$155.00
PT10	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
10/20/2022														
PT11	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$0.00	\$0.00
PT12	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$30.00	\$30.00
10/8/2022														
PT13	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$50.00	\$50.00
PT14	✓	✓	✓	✓	✓	✓	⊘	⊘	⊘	✓	✓	✓	\$75.00	\$75.00

% Error 3%
% Correct 97%

Values presented are fictitious and for learning purposes only
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PEER REVIEW

Rate each person and item as follows:

4 - Always

3 - Very Often

2 - Occasionally

1 - Rarely

0 - Never

N - Not enough experience with this person in this behavior to fairly provide an impression

Survey #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	TOTAL		
DOLLY PARTON																												
Polite and respectful to other staff members	4	4	4	4	4	3	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	85	3.86
Polite and respectful to patients	4	4	4	4	4	3	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	85	3.86
Willing to help a coworker when asked	3	4	4	4	4	3	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	84	3.82
Displays a positive attitude in the practice	3	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	83	3.77
Promotes good teamwork in the office	4	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	84	3.82
Is someone I trust	4	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	84	3.82
Is willing to "do extra" to help patients	3	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	83	3.77
Displays highly ethical behavior	3	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	83	3.77
Strives for excellence in his/her work	4	4	4	4	4	2	4	4	2	4	4	4	4	-	4	-	4	4	-	4	4	4	4	4	4	4	84	3.82
																										3.81		

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Performance Review: Self-Evaluation

This Self Evaluation Form is an opportunity for you to provide input into your Performance Review Process. The form assists you in focusing on specific aspects of your job performance, including your unique strengths, talent and development focus for the future.

Name:	Dolly Parton
Position:	Front Desk/Triage
Hire Date:	10/14/2021
Last Review:	6 months ago
Review Type:	1 year eval
Review Due:	

1. What do you believe have been your main accomplishments during this review period?

Accuracy and great patient service

2. What particular part (s) of your job do you enjoy most?

Talking with patients

3. What do you find most straightforward or easy in your job?

Checking in patients and referrals

4. What do you find most difficult in your job and were there things that may have hindered your performing as well as you could have?

Sometimes getting everything done by the end of my shift with triage. Things that hindered are the phone calls/voicemails and helping with urgent care on triage shifts.

5. What can be done to help you to be more effective in the areas mentioned in question #4?

Not having to answer so many phone calls from all the clinics, not having to help with urgent care while working triage and having more than one person working front desk.

6. What areas would you like to develop during the next review period?

None.

Signature Date

Signature Date

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HEALTHCARE TEAM REVIEW - FD

	NEVER	SOMETIMES	MOST OF THE TIME	ALWAYS
1. Is respectful and caring to members of his/her healthcare team?			1	2
2. Places patients as top priority (responds to phone calls, helpful to patients)			1	2
3. Patients comment on how friendly and caring he/she was during check in.			1	2
4. He/she manages their down time constructively to complete passive tasks (cleaning, making new patient packets, scanning)			1	2
			<i>Out of 3 responses</i>	
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PEER REVIEW TEMPLATE

Please evaluate your other staff members in the following behaviors: (Rate from 0 – 4 or N)

4 = Always 3 = Very often 2 = Occasionally 1 = Rarely 0 = Never

"N = Not enough experience with the person in this behavior to fairly provide an impression"

	Employee 1	Employee 2	Employee 3	Employee 4	Employee 5	Employee 6	Employee 7	Employee 8	Employee 9
Polite and respectful to other staff members									
Polite and respectful to patients									
Willing to help a co-worker when asked									
Displays a positive attitude in the practice									
Promotes good teamwork in the office									
Is someone I trust									
Is willing to "do extra" to help patients									
Displays highly ethical behavior									
Strives for excellence in his/her work									

**TIP: Using a digital form makes it easier to collect responses and remain anonymous. We use Cognito Forms for all staff surveys. See an example here: <https://www.cognitoforms.com/PhysiciansUrgentCare1/peerreviewexample>*

PROVIDER ANNUAL REVIEW SAMPLE

TWINKLE ANDRESS, NP

PUC Review Summary

Employee Status: Full Time non exempt

DOH: 10/01/2021

Date of Review: 10/25/2021

Current Pay: \$56/hr

Update on PTO: Accrual of .0385 of PTO for each hour worked, 80 hours per year

License expires: 2/28/23

DEA expires: 10/31/24

To Be Reviewed Today

What does a provider need to be good at? Coding, efficiency, staff relations, patient service/communication

Coding trends: Managing partner

Avg throughput (cycle time) + solo shift visit times

Chart completion time

Patient reviews 2022

Hours worked v hours scheduled = 1315 hrs scheduled/ 1446 hrs worked/ **variance = 130hrs 47min**

Tardiness/absenteeism: 139 shifts in 2022

5 Tardies: 1/7, 7/3, 3/31, 8/4, 5/9

2 Call Outs: 1/20 (COVID), 9/15 (migraine)

1 Unexcused missed provider gathering: 7/7

Annual Peer Review

3-member Healthcare Team Review

Patients sent to the ER

20% of charts sign off

Training Needs

Managing Partner

Date

Practice Administrator

Date

_____ : Employee Initials

PROVIDER MONTHLY REPORT - February 2023

	99201	99202	99203	99204	99205
MGMA/EM	2%	3%	43%	49%	3%
UCA Coding	6%	14%	44%	30%	6%
Phoenix HCS	1%	12%	50%	32%	5%
Docutap	0%	2%	49%	47%	2%
Average	2%	8%	47%	40%	4%

	99211	99212	99213	99214	99215
	2%	5%	43%	45%	5%
	n/a	n/a	n/a	n/a	n/a
	2.2%	2.6%	42.0%	50.3%	3.0%
	n/a	n/a	n/a	n/a	n/a
	2%	4%	43%	48%	4%

1 - CPT CODING	99201	99202	99203	99204	99205
TWINKLE	0%	1%	57%	37%	5%
DOLLY	0%	0%	69%	31%	0%
GEORGE	0%	4%	41%	55%	0%
CARRIE	0%	18%	27%	55%	0%
SHANIA	0%	8%	69%	17%	6%
GARTH	0%	2%	64%	32%	2%
REBA	0%	0%	65%	35%	0%
WAYLON	0%	0%	26%	73%	1%
MIRANDA	0%	3%	55%	41%	1%
KENNY	0%	0%	51%	48%	2%
LORETTA	0%	0%	76%	24%	0%
WILLIE	0%	0%	19%	79%	2%
TANYA	0%	0%	18%	82%	0%
HANK	0%	3%	58%	38%	1%

	99211	99212	99213	99214	99215
	0%	1%	63%	34%	2%
	0%	0%	34%	61%	5%
	0%	1%	45%	54%	0%
	0%	17%	17%	67%	0%
	0%	4%	53%	41%	3%
	0%	1%	67%	29%	3%
	0%	0%	73%	27%	1%
	0%	1%	34%	64%	1%
	0%	1%	44%	53%	1%
	0%	3%	37%	59%	1%
	0%	0%	40%	60%	0%
	0%	1%	31%	65%	3%
	0%	0%	11%	89%	0%
	0%	5%	35%	54%	7%

PROVIDER MONTHLY REPORT - February 2023

2 - AVG CYCLE TIME - Based on solo shifts

<i>PUC Standard</i>	<i>Less-Than or Equal to 60 min per visit</i>
TWINKLE	39 min <i>8 solo shifts</i>
DOLLY	- <i>no solo shifts</i>
GEORGE	43 min <i>4 solo shifts</i>
CARRIE	- <i>no solo shifts</i>
SHANIA	47 min <i>2 solo shifts</i>
GARTH	- <i>no solo shifts</i>
REBA	48 min <i>5 solo shifts</i>
WAYLON	53 min <i>2 solo shifts</i>

<i>PUC Standard</i>	<i>Less-Than or Equal to 60 min per visit</i>
MIRANDA	- <i>no solo shifts</i>
KENNY	44 min <i>9 solo shifts</i>
LORETTA	43 min <i>4 solo shifts</i>
WILLIE	46 min <i>6 solo shifts</i>
TANYA	- <i>no solo shifts</i>
HANK	43 min <i>7 solo shifts</i>
PATSY	51 min <i>8 solo shifts</i>
MERLE	40 min <i>13 solo shifts</i>

PROVIDER MONTHLY REPORT - February 2023

3 - PT SURVEY MENTIONS/SCORE

PUC Standard

9.0 or Higher Rating Avg (If Applicable) & Positive Comments

"Everyone I came into contact with was welcoming & helpful. My medical issue was attended to in a timely & professional manner. I did not feel rushed but felt comfortable & heard. NP **DOLLY** was informative & personable. The office is warm & welcoming & it just so happened to be customer appreciation week & I left with a chocolate candy bar! I highly recommend Urgent Care at Berry Farms!" - *Google*

"**WAYLON**. was excellent. The staff was so friendly, I have never experienced this to such an extreme at a walk-in before. They made sure I was comfortable and safe every step of the way. Makes things a lot easier when you're laughing through a difficult situation. 10/10." - *Google*

"I love this place, the staffs were superb. Friendly and receptive.... Doctor **REBA** is excellent ♡♡♡♡♡" - *Google*

"Whole staff is amazing! **GARTH** is next level. So thorough and answered my (many) questions. I left with peace of mind. Very thankful for this practice!" - *Google*

"I came to this location very sick. **PATSY** and the rest of the staff were very dedicated. They were able to help me despite me coming in with an unusual health situation. I appreciate the professionalism and focus on patient wellness that I experienced. I could tell **PATSY** and his staff truly cared." - *Google*

"We always love **WILLIE** (P.A.). He is fantastic with my son in his bedside manner and approach every time!! He recognizes us when we come in, and takes his time assessing him and ensuring we are really well cared for. We don't EVER go anywhere else for urgent care now that we have found Physician's UC!" - *Google, Fr*

"Amazing place with fantastic service. The front desk checked me in efficiently and I was taken to a treatment room immediately. **MIRANDA** took the time to really listen to all my medical concerns and answered all my questions—I also had one of the most painless blood draws I have ever had—the staff is fantastic!! I was in and out in under an hour. What a great place, I will definitely use Physicians' Urgent Care in the future!!" - *Google, FR*

*Names and values presented are fictitious and for training purposes only
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ANNUAL PEER REVIEW

Rate each person and item as follows:

4 - Always

3 - Very Often

2 - Occasionally

1 - Rarely

0 - Never

N - Not enough experience with this person in this behavior to fairly provide an impression

Survey #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	TOTAL		
TWINKLE ANDRESS																												
Polite and respectful to other staff members	4	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	99	3.96
Polite and respectful to patients	3	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	98	3.92
Willing to help a coworker when asked	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	100	4.00
Displays a positive attitude in the practice	3	4	4	4	4	4	4	4	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	98	3.92
Promotes good teamwork in the office	4	4	4	4	4	4	4	4	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	99	3.96
Is someone I trust	3	4	4	4	4	4	4	4	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	98	3.92
Is willing to "do extra" to help patients	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	100	4.00
Displays highly ethical behavior	4	4	4	4	4	N	4	4	4	4	4	4	2	4	4	4	4	4	4	4	4	4	4	4	4	4	94	3.92
Strives for excellence in his/her work	4	4	4	4	4	3	4	4	4	4	4	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	98	3.92
																											3.95	

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ANNUAL STAFF SURVEY RESULTS

	Aug 2018	Apr 2019	Jul 2020	Aug 2021	Jul 2022
I am a valued person in the office	8.6	8.4	8.6	9.0	8.9
I am aware of our practice's strategic goals	8.0	8.3	8.7	8.7	8.6
I am paid fairly for what I do	7.5	7.9	8.0	7.8	8.7
I have had enough training to do my job well	8.3	8.3	8.5	8.1	9.1
Our benefits and incentives are good	7.3	7.1	7.4	7.9	8.4
The spirit of cooperation among people is	8.5	7.7	8.6	8.9	8.5
My feeling of personal contribution here is	8.7	8.5	9.4	8.8	9.3
The amount of training I receive	7.4	8.0	8.5	8.0	8.7
My overall rating of satisfaction	8.4	8.2	8.5	8.8	9.0
Our doctors are concerned about patient care	9.7	9.0	9.7	9.6	9.4
PUC management encourages a good work attitude	9.0	8.0	8.8	9.2	9.3
I am given the tools and equipment to do my job	8.8	8.1	8.8	8.8	8.8
I know what I am supposed to do in my job	9.5	8.9	-	9.1	9.8
I feel I can give suggestions to my manager or providers	8.2	7.9	9.3	8.7	8.9
My overall confidence in the state of US Healthcare	7.3	7.1	7.8	7.6	6.2
My overall confidence in the state of US Urgent Care	7.9	7.7	8.3	8.2	7.0
My confidence in recommending PUC to others	9.5	8.7	9.3	9.3	9.5
My confidence in the future and direction of the company	8.4	8.3	8.6	9.0	9.1
We are making a difference in patients' lives	9.5	9.0	9.6	9.3	9.4

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TECH/MA

Annual/Bi-Annual Employee Review

Employee Name: WILLIE NELSON

Hire Date: 9/16/2020

Last Raise: 12/2020

Last Review: 90 DAYS

Date of Review: 9/22/2021

1.Lab Resulting Dates: 7/7/22, 7/11/22, 7/20/22, 8/29/22, 9/12/22, 9/14/22, 9/15/22

Accuracy: 7 out of 7, 100%

2. Medication Documentation Dates: 8/22/22, 8/29/22, 9/7/22, 9/14/22

Accuracy: 4 out of 4, 100%

3.Peer Review: See Attached

4. Small Healthcare Team Feedback: See attached

5.Self-Evaluation: See attached

Tardiness/Absenteeism:

Absences: 1/18/22, 4/26/22, 7/11/22, 7/12/22, 8/15/22, 10/3/22 **(6)**

Tardies: 1/3, 1/5, 1/10, 1/11, 1/19, 1/28, 1/31, 2/2, 2/4, 2/8, 2/10, 2/14, 2/16, 2/17, 2/21, 2/23, 2/24, 3/7, 3/9, 3/17, 3/18, 3/22, 4/15, 4/16, 4/25, 4/27, 5/6, 5/15, 5/18, 6/4, 6/7, 6/8, 6/13, 6/16, 6/24, 6/28, 7/5, 7/7, 7/11, 7/13, 7/22, 7/25, 7/29, 8/11, 8/16, 8/19, 8/23, 8/26, 9/6, 9/9, 9/13, 9/20, 9/22, 9/23, 9/26, 9/27, 9/29, 9/30, 10/4, 10/7, 10/11, 10/13, 10/18, 10/19, 10/21, 10/24, 10/25, 11/1, 11/2, 11/4, 11/15, 11/18 **(72)****

Manger Scoring:

Rating between 0-4 4=Always 3=Very often 2=Occasionally 1=Rarely 0=Never

Initiative: 4 – Willie is always willing to help in the clinic when needed

Attitude: 4 – Willie has a positive attitude and is always in a good mood, even when it is busy in the clinic. He leaves his personal life at the front door and does not let it affect his work.

Patient Service: 4 – Willie always assists patients when needed. He will go above and beyond to help patients.

Quality of work: 3 – Willie needs to continue to work on updating patient medications in their chart.

Total Score: 15

Employee Signature: _____ Date: _____

Manager Signature: _____ Date: _____

TECH AUDIT

Date	Patient	Chief Complaint	Allergies	Medication	Surgeries	Medical Hx	Vitals	Medication Result	Lab Result
7-Jul	1	✓	✓	✓	✓	✓	✓	-	✓
11-Jul	2	✓	✓	✓	✓	✓	✓	-	✓
13-Jul	3	✓	✓	✓	✓	⊘	✓	-	-
19-Jul	4	✓	✓	✓	✓	✓	✓	-	-
20-Jul	5	✓	✓	⊘	✓	✓	✓	-	✓
22-Jul	6	✓	✓	✓	✓	✓	✓	-	-
8-Aug	7	✓	✓	⊘	✓	✓	✓	-	-
11-Aug	8	✓	✓	✓	✓	✓	✓	-	-
22-Aug	9	✓	⊘	✓	✓	⊘	✓	-	-
29-Aug	10	✓	✓	⊘	✓	✓	✓	✓	✓
31-Aug	11	✓	✓	✓	✓	✓	✓	✓	-
7-Sep	12	✓	✓	✓	✓	✓	✓	-	-
12-Sep	13	✓	✓	✓	✓	✓	✓	✓	-
12-Sep	14	✓	✓	✓	✓	✓	✓	-	-
14-Sep	15	✓	✓	⊘	✓	⊘	✓	-	✓
14-Sep	16	✓	✓	⊘	✓	✓	✓	✓	-
15-Sep	17	✓	✓	✓	✓	✓	✓	-	✓
15-Sep	18	✓	✓	✓	✓	✓	✓	-	-
19-Sep	19	✓	✓	✓	✓	⊘	✓	-	✓
19-Sep	20	✓	⊘	✓	✓	✓	✓	-	-

% Error 6.8%
% Correct 93.2%

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PEER REVIEW

Rate each person and item as follows:

4 - Always

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N - Not enough experience with this person in this behavior to fairly provide an impression

Survey #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	TOTAL	
WILLIE NELSON																											
Polite and respectful to other staff members	4	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	85	3.86
Polite and respectful to patients	4	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	85	3.86
Willing to help a coworker when asked	3	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	84	3.82
Displays a positive attitude in the practice	3	4	4	4	4	3	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	85	3.86
Promotes good teamwork in the office	4	4	4	4	4	3	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	86	3.91
Is someone I trust	3	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	3	4	4	83	3.77
Is willing to "do extra" to help patients	3	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	84	3.82
Displays highly ethical behavior	3	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	84	3.82
Strives for excellence in his/her work	3	4	4	4	4	2	4	4	4	4	4	4	-	-	4	-	4	4	4	3	4	4	4	4	4	84	3.82
																											3.84

Names and values presented are fictitious and for learning purposes only

Jodi Strock – Urgent Care Association Convention 2023



Performance Review: Self-Evaluation

This Self Evaluation Form is an opportunity for you to provide input into your Performance Review Process. The form assists you in focusing on specific aspects of your job performance, including your unique strengths, talent and development focus for the future.

Name:	Willie Nelson
Position:	Medical Assistant

1. What do you believe have been your main accomplishments during this review period?

Growth throughout the practice, new skills, and knowledge. Being a team player.

2. What particular part (s) of your job do you enjoy most?

Built relationships, teamwork from some of our coworkers. Outings planned with coworkers has helped a lot of us to keep us sane. Rewards/bonuses.

3. What do you find most straightforward or easy in your job?

Primary Care with George. We have awesome patients. Emails that keep us up to date with everything.

4. What do you find most difficult in your job and were there things that may have hindered your performing as well as you could have?

Communication w coworkers.

5. What can be done to help you to be more effective in the areas mentioned in question #4?

Team communication

6. What areas would you like to develop during the next review period?

time management

Signature

Date

HEALTHCARE TEAM REVIEW - TECH

	NEVER	SOMETIMES	MOST OF THE TIME	ALWAYS
1. This tech anticipates tasks and xrays and remains three steps ahead in the patient flow to best help the provider be efficient.			1	4
2. He/she manages their down time constructively to complete the passive tasks in the clinic (calling patients with lab results, restocking, cleaning)			1	4
3. This tech places patients as top priority (moving quickly to pending exams, responds to phone calls, etc)		1		4
4. Patients comment on how friendly and caring he or she is in the room.			1	4
			<i>5 responses total</i>	
		<i>Values presented are fictitious and for learning purposes only</i>		
		Jodi Strock – Urgent Care Association Convention 2023		

Front Desk Quiz #1

Customer Service

1. A patient in our office has been asked to check-in on clockwise. They are having difficulty using the iPad. What do you do?
 - a. Ask them to just give you their information and check them in yourself.
 - b. Get up and walk around to help navigate them through the screens.**
 - c. Ignore them and continue your own work.

2. A patient is limping into the clinic. It looks like they have injured their foot or ankle. What do you do?
 - a. Continue to watch them limp into the clinic until they arrive at your desk.
 - b. Get up and hold the door for them so they can enter the clinic.**
 - c. Offer to grab them a wheelchair from the back since they are having difficulty walking.

3. The phone is ringing while you are checking out a patient. What do you do?
 - a. Politely excuse yourself, answer the phone and ask if you can put them on a brief hold.**
 - b. Ignore the ringing phone and finish checking out the patient in front of you.
 - c. Ask the patient you are checking out to “hold on” and answer the phone.

4. A patient comes into the clinic and states they are having difficulty breathing after eating something. You then decide to do what?
 - a. Check them in like normal. The patient isn't blue, and they don't have a rash – but you keep an eye on them.**
 - b. Quickly go alert a tech or provider in the back so they can assess the patient.
 - c. Call 911, this sounds serious.

5. A patient in the lobby is having trouble making a cup of coffee. You have many patients checking in and the phone is ringing. What do you do?
 - a. Get up and walk over to the patient and ask if you can assist them.
 - b. Let them figure it out, you have so many patients to check in and the phone is ringing off the hook.**
 - c. Yell over to them that you will come help in a minute once you finish checking all these patients in.

6. A patient is checking in with a laceration and is dripping blood all over the floor. What do you do?
 - a. Grab a Lysol wipe and clean up the area.
 - b. Go to the back and ask the tech for any gauze or items to help the patient control the bleeding. Get gloves and wipe up the blood with proper sanitizing wipes.**

- c. Send the patient to the Emergency Department. A laceration that severe will take too long to suture.
 - d. Hand them the wet wipes and let them clean it up. After all, their blood could be contaminated.

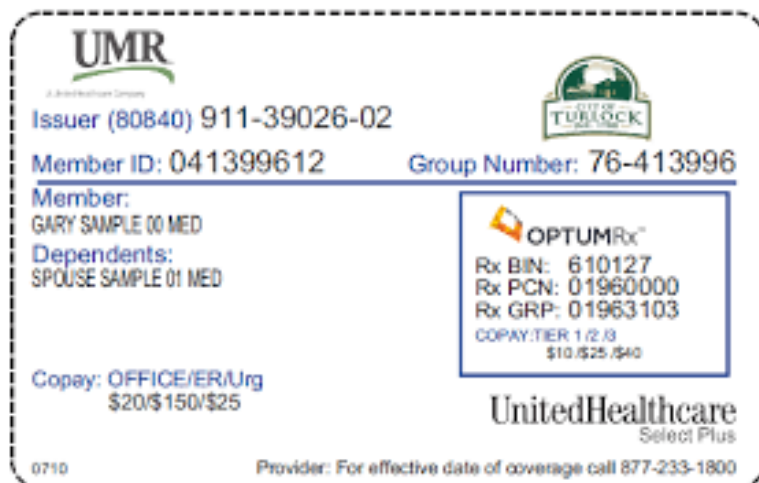
7. A patient brings their small dog with them to the clinic. The dog does not have a service dog harness on. The dog is quiet and hasn't barked. You ask if the dog is a service animal, and the patient says no. What do you do?
 - a. The dog has been quiet, so you decide to let the dog stay with the patient during the visit.
 - b. Politely advise the patient that we do not allow animals in the clinic. We are happy to see the patient but not with the dog present.**
 - c. Go over to the patient and start playing with the dog.

8. A patient has checked in with an injured ankle. You can tell that they are in pain and their ankle is swollen.
 - a. Offer them an ice pack.**
 - b. Continue to work on your tasks. There have been many injuries today.
 - c. Tell the patient to go ahead and take some Motrin or Tylenol if they have any.

9. A young patient with an upset stomach has just vomited in the lobby floor.
 - a. Go back and grab a tech to clean up the mess – they deal with bodily fluids every day.
 - b. Put on gloves and clean up the mess using wipes and Lysol. Offer a patient a sick bag in case they feel nauseous again.**
 - c. Rope off that area of the lobby and lay down paper towels. When the cleaning crew comes after hours, they will sanitize the area appropriately.

Insurance

1. A patient comes into PUC with this insurance. What do you think their copay will be for today's visit?



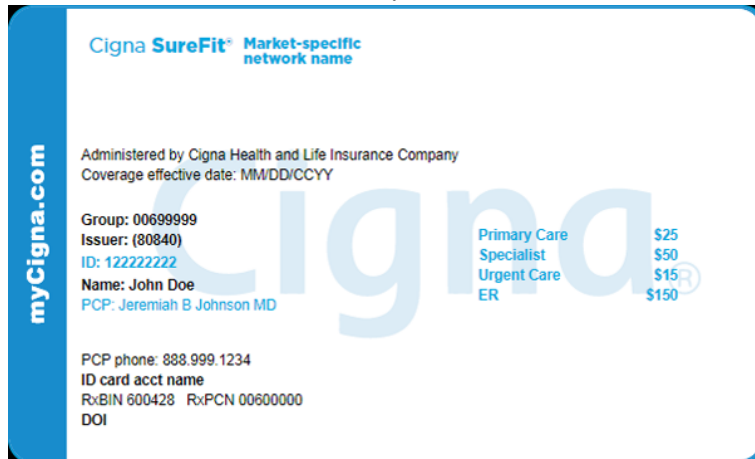
- a. \$20

- b. \$150
 - c. **\$25**
2. What is a deductible?
- a. A fixed amount that the insurance pays for covered medical services.
 - b. The amount of money the patient must pay before the insurance company will pay on a claim.**
 - c. The percentage of medical costs the insured actually has to pay.
3. What is a copay?
- a. The fixed amount the insured pays for covered medical services.**
 - b. The amount of money the patient must pay before the insurance company will pay on a claim.
 - c. The percentage of medical costs the patient actually has to pay.
4. "Child1 Smith" is checking into the clinic for a fever. Who should be entered as the appropriate policyholder?



- a. Child1 Smith
- b. Spouse Smith
- c. Employee Smith**

5. On the card below, what would you choose as the member ID?



- 00699999
- 80840
- 122222222**

Mathematics

- What is 10% of \$150?
 - \$1.50
 - \$10
 - \$15**
- A patient's balance comes out to \$130. They want to split the payment evenly between their HSA and debit cards. How much do you charge to their HSA card?
 - \$55
 - \$60
 - \$65**
- A mom and her four children are all checking in to be seen. They have a \$75 copay with their insurance plan. What is the total charge for their visit?
 - \$375**
 - \$75
 - \$300
- What is 20% of \$100?
 - \$2
 - \$20**
 - \$10
- The balance for a patient's visit is \$258. They only have \$55 left on their HSA card, so they will write a check for the remainder. What amount should they make the check out for?
 - \$200
 - \$203**
 - \$208

6. What is 20% of 150?
 - a. \$15
 - b. \$30**
 - c. \$20

7. What is 30% of \$130?
 - a. \$30
 - b. \$13
 - c. \$39**

Situational Discussion

1. Tell me how you would handle a situation where you needed to manage an upset individual at the reception desk.
 - a. Inform the person that you are not the one who handles complaints.
 - b. Apologize and try to help answer any concerns they have. If you are unable to resolve the situation, inform the person that you will take their information down and ensure this gets to a manager for follow-up.**
 - c. Walk away from the situation to find help.

2. A person calls and asks to speak to someone who isn't available to talk. What do you tell them so they will feel that you are doing your best job to enable them to connect with the person they wish to speak to?
 - a. They are not available at this time; can I take a message?**
 - b. She doesn't work at this clinic but can be reached at our other location.
 - c. Give them the staff member's personal phone number.

3. How would you respond to a person who calls complaining about a bill they received?
 - a. Inform the person that we outsource billing and cannot answer their questions.
 - b. Tell them to call their insurance company.
 - c. Apologize and inform the patient of the number to call for all billing questions and concerns.**

4. A patient walks into the clinic 5 minutes before closing.
 - a. Greet the patient and inform them that the clinic is closing soon and will reopen at ____ time tomorrow.
 - b. Greet the patient and check them in to be seen.**
 - c. As the door opens, inform the person that we are closing and go lock the door.

5. Tell me how you would handle a situation where the computers shut down in the middle of the shift.
 - a. Panic and call a manager to complain.

- b. Inform the team and/or manager of the situation and begin downtime procedures.**
 - c. Inform the patients that our computers are down, and we are unable to verify any of their information to be seen today.

- 6. Where would you file the paperwork of John Smith?
 - a. After Haley Thomas
 - b. Between Jessica and Joe Smith
 - c. Before James Sullivan**

- 7. Edit this email to a patient:

Hi Joan

I hope your doing well today. Dr. Williams told Amanda and myself to reach out to you and answer any questions. Rite now, we offer 3 types of injections. The PRP injection compliments our steroid treatments. Its a great treatments for joint pane.

*To learn more,
give me a call!
We would love to see u!*

FRONT DESK QUIZ #2**1. If the phone rings while you have a patient in front of you, you should:**

- A. Let the phone ring and continue helping the patient in front of you.
- B. Answer the call and then finish helping the patient in front of you.
- C. Answer the call, ask to put the caller on hold, finish helping the patient in front of you, and then help the person waiting on hold.

2. What is the name of the program PUC employees use to clock in, clock out, and approve timecards?

- A. W2W
- B. ADP Workforce
- C. NextGen Office

3. Which BCBS plan requires PUC to charge the patient a specialist copay?

- A. BCBS network P
- B. BCBS FEP
- C. BCBS network S

4. We do not collect money from patients who have a _____?

- A. Health Savings Account
- B. Health Reimbursement Account

5. What is a deductible?

- A. A flat fee charged to patients for an office visit.
- B. The amount of money a patient must pay into their medical plan before their insurance begins covering a percentage of the cost.
- C. The maximum amount that a patient will pay before insurance covers all costs at 100%.

6. A patient with an outstanding balance calls the clinic and requests to pay over the phone. You should:

- A. Offer to transfer them to Phoenix Billing.
- B. Tell them to log into their patient portal to pay their balance.
- C. Look the patient up to verify there is a balance, then take their credit card information and “post and apply” their payment.

7. What is the maximum amount we can currently charge Aetna patients?

- A. \$130
- B. \$150
- C. \$165

8. A patient comes in for a wound re-packing (originally done at PUC). Do you charge them for an office visit?

- A. Yes
- B. No

9. A child is brought in who has sprayed themselves in the eye with a poisonous liquid and needs to be seen immediately. The child is brought in by a grandparent who has no insurance card or written consent from the parent to be seen at PUC. What do you do?

- A. Send them to the Emergency Room to be seen.
- B. Inform the grandparent we will see the child as soon as written permission is received by the parent. We can obtain insurance information later.
- C. Notify the provider and bring the child back immediately. Get written permission and insurance information as soon as possible.

10. Which of the following plans are NOT in network with PUC? (Circle all correct answers)

- A. TennCare
- B. UMR
- C. Cigna Healthspring
- D. BCBS

11. Medicare Advantage plans include Blue Cross Medicare Advantage and Humana Gold among others. What does this type of plan do?

- A. Acts as a secondary to regular Medicare.
- B. Replaces Medicare.
- C. Provides benefits for additional medical needs like oral meds and orthopedic supplies.

12. A patient checks in with a UHC deductible plan. They have met their deductible and have a 20% co-insurance. You would charge them what amount at check-in?

- A. \$26
- B. \$30
- C. \$31

13. When we send out labs for a patient, they might get an additional bill sent to them from:

- A. PUC
- B. Pathgroup
- C. Lab Corp

14. Which of the following do we need to obtain for every patient?

- A. Name, birthdate, address, and phone
- B. Insurance information
- C. Credit card consent
- D. All of the above

15. What is a copay?

- A. A set amount the patient must pay, every time they are seen, until the out-of-pocket amount is reached.
- B. The maximum amount that a patient will pay before insurance covers all costs at 100%.
- C. The amount of money a patient must pay into their medical plan before their insurance begins covering a percentage of the cost.

16. If a patient does not want to put a credit card on file, you should:

- A. Allow them to be seen. It is never worth a fight.
- B. Be kind but firm about needing a card on file. If they get heated, leave an alert message in their chart as to why you did not put a card on file.
- C. Gently let the patient know a card on file is company policy. If they refuse, we are unable to see them at our clinics.

17. A patient with a BCBS deductible plan comes in for an office visit. Their deductible has NOT been met. You should collect:

- A. A penny and then delete the penny.
- B. \$50 towards the total cost of the office visit.
- C. Nothing. We cannot determine the final cost of the office visit and will bill them.

18. A mother brings her child to PUC to be seen. The child has Cover Kids, which we do not take. Can the mother pay our self-pay rate and still have the child seen at our clinic?

- A. Yes
- B. No

19. A Medical Records Request, from a doctor's office, comes through on the fax machine. You should:

- A. Set it aside. It's difficult to determine which requests front desk can handle and which ones must be handled by Shay.
- B. File it in Shay's inbox (if in Franklin) or fax to Franklin for Shay (if not in Franklin).
- C. Print the clinic note, labs, and any other documents requested and fax them back to the requesting doctor's office. Only requests from law offices and insurance companies need to go to Shay.

20. What is needed for a patient to have a rapid Covid test covered by insurance?

- A. Fear they may have Covid
- B. Travel within the past month
- C. Symptoms
- D. Upcoming travel
- E. Patient going to a concert or event

Insurance Quiz

1. A patient checks in with an **Aetna deductible plan with 10% urgent care coinsurance**. They have NOT met their individual deductible, but HAVE met their family out of pocket, what do you collect?
 - a. \$165
 - b. \$0
 - c. \$16.50

2. Do we collect for patients who have a primary and secondary insurance?
 - a. Yes
 - b. No

3. If a patient has a **Blue Cross Blue Shield deductible plan with 10% coinsurance**, and they HAVE met their family deductible, but NOT their individual deductible, what amount should be collected?
 - a. \$0
 - b. \$50
 - c. \$10

4. For a patient who has **Blue Cross Blue Shield copay plan network S**, which of the following amounts do we collect if they have NOT met their deductible or out of pocket?
 - a. \$50
 - b. Professional (office visit) copay
 - c. Professional (specialist visit) copay
 - d. Urgent Care copay

5. How do you determine whether a patient's **Cigna** insurance plan is a **deductible plan** when viewing their benefits?
 - a. Next to *Urgent Care* it has a percentage
 - b. Next to *Urgent Care* it has a dollar amount
 - c. Their deductible is greater than \$5000

6. What do I do if I've never seen a patient's type of insurance before?
 - a. Look at the back of the card for the address of medical claims to find a company name
 - b. Just scan the card in, and leave the insurance tab blank
 - c. Tell the patient that they must be self-pay

7. What amount is collected up front for a **self-pay new Urgent Care patient** who has a possible broken foot?
 - a. 130
 - b. 225
 - c. 175

8. Do we see patients who have **TennCare**?
 - a. No
 - b. Yes, but they must be self pay

9. Which **Blue Cross Blue Shield plan** requires PUC to charge the patient an Urgent Care copay?
 - a. BCBS Network S
 - b. BCBS FEP
 - c. BCBS Network P

10. What is a deductible?
 - a. A flat fee charged to a patient for an office visit
 - b. The amount of money a patient must pay into their medical plan before their insurance begins covering a percentage of the cost
 - c. The maximum amount that a patient will pay before insurance covers all costs at 100%

11. What do we collect for the out of network **Blue Cross Blue Shield Medicare Advantage** plan?
 - a. Urgent Care copay
 - b. \$50
 - c. Specialist copay

12. A patient checks in with a **UHC deductible plan**. They HAVE met their family deductible, but NOT their individual deductible and have a 20% coinsurance. What would you charge them?
 - a. \$0
 - b. \$30
 - c. \$130
 - d. \$26

13. If a patient has a **Blue Cross Blue Shield deductible plan** and HAS met their deductible but NOT their out of pocket, do you collect anything?
 - a. Yes
 - b. No

14. What is the flat rate fee for Humana?
 - a. \$165
 - b. \$130
 - c. \$120
 - d. \$150

15. A patient checks in with an **Aetna copay plan**. They HAVE met their individual deductible, but NOT their out of pocket. What would you charge them?

- a. Urgent Care copay
- b. \$0
- c. \$165