**Departmental Assessment Form**

### Patient Care Coordinator

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1= Never, 2= Rarely, 3= Sometimes, 4=Mostly, 5= Always**

1. I greet patients in a professional and cheerful manner based on standardized script and protocol.

**1 2 3 4 5**

1. I confirm appointments according to the standardized script.

**1 2 3 4 5**

1. I answer incoming calls according to the standardized script.

**1 2 3 4 5**

1. I ask existing patients to verify insurance, any prior balance, and personal information.

**1 2 3 4 5**

1. I fill out and confirm information on the insurance verification form.

**1 2 3 4 5**

1. I check phone messages in the morning, at noon, and before close.

**1 2 3 4 5**

1. I check e-mail in the morning, at noon, and before close.

**1 2 3 4 5**

1. I verify all lab cases for the following day have arrived.

**1 2 3 4 5**

1. I track all inbound and outbound lab cases for the following day.

**1 2 3 4 5**

1. I distribute mail to the appropriate department.

**1 2 3 4 5**

1. I check out patients according to standard protocol.

**1 2 3 4 5**

1. I collect payments and make payment arrangements allowing for 97% collection percentage monthly.

**1 2 3 4 5**

1. I show empathy and concern when talking to patients.

**1 2 3 4 5**

1. I edify the doctor and staff to patients whenever possible.

**1 2 3 4 5**

1. I scheduled 90% of all treatment plans that I present.

**1 2 3 4 5**

1. I communicate respectfully and effectively with the entire team in the practice.

**1 2 3 4 5**

1. I make calls on all unscheduled treatment weekly and re-appoint at least 50% of those treatments.

**1 2 3 4 5**

1. I confirm that we are scheduled to production goal for doctor and hygiene daily.

**1 2 3 4 5**

1. I make sure there are zero hygiene openings for the next day.

**1 2 3 4 5**

1. I call on recare daily and make sure I have an active process involved to keep recare current.

**1 2 3 4 5**

1. I turn in my end of day sheet to OM nightly.

**1 2 3 4 5**