



POSITION REQUIREMENT & EVALUATION FORM (PREF)

NAME: _____ EVAL. PERIOD: _____ TO _____
 PAYROLL TITLE: MEDICAL ASSISTANT - JDH INTERNAL TITLE: _____
 CLASS CODE: 0827 LAST EVAL: _____
 DEPARTMENT/MC: _____ DATE OF EVAL. CONF: _____

PURPOSE OF POSITION: Provides a full range of tasks in scheduling patient flow, assisting with patient and routine clinical tasks in an outpatient, inpatient or specialty setting.

SPECIAL REQUIREMENTS:

3 Mos. _____
 6 Mos. _____
 ANNUAL _____
 OTHER _____

ATTENDANCE:

#DAYS/#OCCURRENCES _____ / _____

COMPETENCY LIST*

EDUCATION RECORD*

AGE SPECIFIC*

*ATTACH

EMPLOYEE DATE

NEXT LEVEL MANAGER DATE

EVALUATOR DATE

HR CERTIFICATION DATE

EVALUATION SUMMARY

CATEGORY	RATING
1. PATIENT CARE	_____
2. SUPPORT FOR PROFESSIONAL SERVICES / DIAGNOSTIC TESTING	_____
3. SAFETY	_____
4. MANDATORY REQUIREMENTS	_____
5. INTERPERSONAL / ORGANIZATIONAL EFFECTIVENESS	_____
6. FISCAL RESPONSIBILITY	_____
7. PERSONAL AND PROFESSIONAL ACCOUNTABILITY	_____
8. QUALITY	_____
9. OTHER	_____

RATING SCALE

- 5 = Exceptional**
Consistently exceeds standards. Shows initiative in setting priorities that strongly support organizational mission and goals.
- 4 = Highly Successful**
Consistently meets standards and sometimes exceeds them. Sets priorities that support organizational mission and goals.
- 3 = Fully Successful**
Consistently meets standards in all performance areas. Demonstrates ability to set priorities consistent with organizational mission and goals.
- 2 = Minimally Successful**
Does not consistently meet standards in one or more performance areas(s). Needs to demonstrate ongoing ability to set priorities that reflect organizational mission and goals.
- 1 = Unacceptable**
Consistently deficient in meeting standards in one or more performance area(s). Fails to set priorities that reflect organizational mission and goals.

SUMMARY COMMENTS

OVERALL RATING: _____ Satisfactory _____ Unsatisfactory or a total score less than _____

An employee will be considered to have an unsatisfactory evaluation if he/she receives less than 2 in any one of the categories, or less than 3 in any two categories.

GOALS FOR NEXT PERIOD

NO	DESCRIPTION	ACTION PLAN

EMPLOYEE COMMENTS:

I Agree Disagree with this evaluation.

CATEGORIES OF RESPONSIBILITY

1. PATIENT CARE

ELEMENTS

- Performs clinical procedures as delegated and in accordance with JDH standards
- Performs routine procedures i.e. vital signs, height, weight, visual acuity, in accordance with protocols and reports deviations to provider
- Collects routine urine, stool, sputum and blood samples
- Performs decentralized labs per unit standards
- Completes documentation appropriately and in accordance with JDH standards
- Explains procedures to patients, putting them at ease
- Prepares patients for testing/procedures
- Provides patients with privacy and dignity
- Transports patients safely
- Refers patients to appropriate physicians/nursing staff when special needs are identified
- Participates in the implementation of care plans

Category Rating

2. SUPPORT FOR PROFESSIONAL SERVICES / DIAGNOSTIC TESTING

ELEMENTS

- Schedules and prioritizes workflow; manages multiple priorities
- Provides appropriate assistance for patients preparation and carrying out clinical procedures
- Makes visual observations of the patient's conditions and reports to nurse and/or physician
- Prepares rooms and work areas for clinics including stocking of rooms and carts with appropriate equipment and materials
- Prepares requisitions and forms for diagnostic testing and ensures completed data on requisitions
- Answers phone and perform clerical functions and responsibilities as appropriate
- Performs basic first line telephone triage activities
- Utilizes IDX application as appropriate
- Maintains patient confidentiality / disposes of documentation appropriately
- Inventories and orders supplies and equipment

Category Rating

CATEGORIES OF RESPONSIBILITY

3. SAFETY

ELEMENTS

Provides a safe environment for the patient

Utilizes mechanical aids and uses proper body mechanics when transferring, transporting patients

Identifies environmental hazards and unsafe conditions for equipment and reports as needed

Adheres to appropriate infection control protocols and procedures

Category Rating

4. MANDATORY REQUIREMENTS (MUST MEET ALL REQUIREMENTS FOR AN OVERALL RATING OF 3, OTHERWISE A RATING OF 1 IS APPLIED)

Has met required mandatory education:

- 1. Safety
- 2. IC
- 3. CPR
- 4. Code Blue
- 5. Laboratory
- 6. Age Specific
- 7. Unit Specific
- 8. Corporate Compliance
- 9. HIPAA

Category Rating (3 or 1)

5. INTERPERSONAL / ORGANIZATIONAL EFFECTIVENESS AND ACCOUNTABILITY BEHAVIOR

ELEMENTS

Committed to determining and exceeding patient/customer needs/satisfaction and promotes area service standards

Demonstrates oral and written communications skills to convey information and knowledge clearly and effectively

Works positively and cooperatively with others to achieve designated outcomes and goals in a courteous and professional manner within an environment of mutual respect and trust

Demonstrates a constructive attitude toward resolving problems and improving processes of care

Demonstrates support of the Health Center commitment to diversity

Shows commitment to learning new knowledge and skills for self-improvement and to enhance service to customers

Category Rating

CATEGORIES OF RESPONSIBILITY

6. FISCAL RESPONSIBILITY

ELEMENTS

Complies with department/unit policies regarding patient charges, supplies/requests, etc.	<input type="checkbox"/>
Uses time wisely to complete assignments in an efficient manner	<input type="checkbox"/>
Identifies and assists in efforts to improve management of supplies at dept/unit level	<input type="checkbox"/>
Participates in dept/unit activities aimed at evaluating/improving fiscal outcomes of care	<input type="checkbox"/>
Category Rating	<input type="text"/>

7. PERSONAL AND PROFESSIONAL ACCOUNTABILITY

ELEMENTS

Reports to assigned area on time at start of shift and following breaks.....	<input type="checkbox"/>
Acts responsibly by considering the needs of the unit when taking leave time	<input type="checkbox"/>
Provides timely notification to appropriate personnel in the event of tardiness or unscheduled absence	<input type="checkbox"/>
Collaborates with the appropriate personnel to coordinate planned vacations and leave time.....	<input type="checkbox"/>
Demonstrates fairness, cooperation and reasonable flexibility in helping to resolve unexpected staffing/coverage issues during crisis periods of high census or acuity.....	<input type="checkbox"/>
Consistently demonstrates adherence to all UCHC policies	<input type="checkbox"/>
Category Rating	<input type="text"/>

8. QUALITY

ELEMENTS

Demonstrates contribution to unit-based programs and strategies to monitor and continuously improve the quality of patient care	<input type="checkbox"/>
Actively participates in the collection of data for unit-based performance improvements	<input type="checkbox"/>
Shows initiative in identifying opportunities for improvement at the department/unit level	<input type="checkbox"/>
Complies with all policies aimed at maintaining a safe environment for patients, families and staff.....	<input type="checkbox"/>
Takes responsibility for staying current with unit and department policies, procedures and standard of care.....	<input type="checkbox"/>
Category Rating	<input type="text"/>

CATEGORIES OF RESPONSIBILITY

OTHER

ELEMENTS

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Category Rating