



## Curbside Consult

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**Q:** *I dread the preparation of annual performance appraisals and usually feel as though I am shooting from the hip in deciding merit increases. What billing data or other criteria can I incorporate into the employee's evaluation process?*

**A:** To ensure that reviews and raises/bonuses are the most fair and beneficial to both the employee and your practice, make sure they include hard data items of both a quantitative and qualitative nature. Throughout the year, you should be saving

plaints about their reviews/raises and provide substantive support for your expectation of next year's goals each employee is requested to meet.

- Patient, staff, or supervisor compliments or complaints. Customer service is the number one success-driver so make sure you not only acknowledge compliments or deal with complaints as they arise, but maintain them in the employee's file for interim quarterly (if negative) and annual reviews.
- Reports of completed special projects including adherence to timeframes, successes, failures, cost-savings, increased collections, teamwork or any other project management aspect.
- Periodic quality audits of staff performance. Use your practice management system to provide regular reporting

report and audit by employee. Generally, if the employee is not meeting expectations, a minimum of a quarterly monitoring process is necessary (barring any possible fraudulent or improper activities); otherwise a bi-annual audit should be sufficient.

- Standard processing reports such as electronic billing rejection, claim rejection, denial analysis and A/R accounts assigned by employee generally contain sufficient information to demonstrate effort and results over time.
- Last year's review, including goals for the current year, should be reviewed and utilized. Of course this dated information is more useful if an interim analysis of the current year's performance against the goals has been previously performed at least once during the current year.

Remember, efficient management of employees requires constant supervision of their activities, behaviors and results. Utilizing available tools including staff performance audits, intervention techniques, system data and customer/patient feedback will ensure the most accurate and fair picture of staff performance throughout the year. Analysis and comparison or benchmarking of this data will further enhance your ability to monitor achievement of the practice's profit goals as well.

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patient or other staff notes, reports and other information in a file for each employee. If you are not in the habit of doing this, start a filing system and begin gathering data from today forward to use next year.

In the meantime, here are some good data sources that should be used in the evaluation of employees to ensure a fair and equitable approach to the process among all reviewers, help reduce staff com-

related to quantities and quality/accuracy of accounts scheduled, verified, collected on prior to treatment, coded (use coding audits performed as part of your compliance plan), entered (charge and payment), billed, denials worked, and collected. Each processing function from the initial scheduling call to the collection of the account should have both a quantity and quality measurement

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