

UNIVERSITY MEDICAL CENTER

PERFORMANCE MANAGEMENT PROGRAM  
JOB DESCRIPTION/PERFORMANCE APPRAISAL FORM

**PART I - GENERAL JOB/PERFORMANCE INFORMATION**

<b>Employee Name:</b>	
<b>Job Title:</b> EMS Billing Coordinator	
<b>Position Reports To:</b> EMS Administrative Council	<b>Exempt/Non-Exempt:</b> Non Exempt
<b>Department:</b> Emergency Medical Service	
<b>Job Description Effective Date:</b> Revised – Jan 2006	
<b>Performance Appraisal Period:</b>	

**JOB SUMMARY:**

**Billing Coordinator:** Coordinates all EMS patient charge-related functions of the department. Maintains currency on third party reimbursement criteria for EMS claims from the various reimbursing entities. Provides training to EMS personnel related to documentation, patient charges, and reimbursement requirements to maximize authorized reimbursement potential and follows up on noted deficiencies through the employees supervisor as needed. Receives and addresses questions or comments related to patient charges and other EMS billing issues from EMS customers, reimbursing entities, and others. Coordinates and/or individually performs input of patient data and other billing information as determined by the needs of the department and the availability of additional personnel. Prepares and maintains an orderly filing system of all billing and patient charge-related memorandums, reports, and correspondence originating from and/or directed to the EMS office. Makes decisions on minor matters and completes clerical detail of the department with a high degree of accuracy. Completes other assigned duties and special projects as required by the needs of the department and hospital while insuring a high degree of accuracy.

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**EDUCATION AND EXPERIENCE:**

Graduation from an accredited high school or completion of a GED program approved by University Medical Center is required. Completion of a formal secretarial training program in typing, word processing, data entry, and general clerical training is strongly recommended. Related secretarial experience may be substituted for successful completion of a formal training program.

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**REQUIRED LICENSURES/CERTIFICATIONS/REGISTRATIONS:**

Notary of Texas

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## SKILLS AND ABILITIES

Routinely, work is of medium physical demand with sitting, walking, and standing required for most tasks. Occasionally, some lifting of heavy boxes (records, etc.) may be required. Must demonstrate the ability to perform a variety of clerical duties while maintaining a consistent quantity and quality of work.

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## ENVIRONMENTAL/WORKING CONDITIONS

Ordinarily, will work in a well-lighted, heated and ventilated building. Hours may vary to accommodate departmental needs but will routinely follow standard office hours of the hospital.

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## INTERACTION WITH OTHER DEPARTMENTS AND OTHER RELATIONSHIPS:

The ability to effectively interact with departmental and other hospital personnel while maintaining the confidentiality of sensitive information is essential.

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NOTE: **This job description/performance appraisal form does not describe all job responsibilities that may be assigned to this job.** Job responsibilities may change from time-to-time.

## PERFORMANCE APPRAISAL SECTIONS

### INSTRUCTIONAL GUIDE

*The next sections of the Job Description/Performance Appraisal Form are used to help management staff explain the job responsibilities, performance expectation, set goals, and evaluate job performance. Management Staff should provide employee with regular performance feedback to their employees. Job performance outcome should not be a surprise during the 90-day or annual performance evaluation meeting.*

The Performance Appraisal Section contains:

- 1) Part II – Job Responsibilities - Technical Competence/Leadership Score Card
  - 2) Part III – Policy Compliance and Organizational Behavior – Customary Standards
  - 3) Part IV - Goal Accomplishments and Expected Goals
  - 4) Part V – Mandatory Requirements
- ◆ Mandatory Requirements/Compliance Reminders
  - ◆ Development Need and Improvement Plans
  - ◆ Performance Score Sheet
  - ◆ Signatures

### Performance Ratings:

These performance ratings are used to evaluate an employee's performance.

#### **5-Distinguished/ Exceptional:**

Job performance is at the highest possible level when given this rating. Employee achieves performance outcomes that always and significantly exceed the job expectations. Job expectations are constantly performed at an exceptionally high quality level no matter the situation.

#### **4-Commendable/Above Expectation:**

Achieves performance expectation outcomes that frequently exceed the requirement or goal. Job expectations are performed with commendable quality.

#### **3-Meets Expectations/Competent:**

Employee meets and /or occasionally exceeds all job expectations. Job expectations are performed with quality. This rating recognizes solid quality performance and represents a job well done.

#### **2-Meets Most Expectations/Development Needed/Provisional:**

Employee meets most of the job expectations. Job performance is below standard and need improvement. Additional training may be needed. Corrective actions must be documented.

**1-Rarely Meets Expectations/Unsatisfactory:**

Employee rarely meets the job expectations. The employee has either shown value to the organization but lacks the job skills, or desire, or the employee has the skills to perform the task but needs a considerable amount of additional training and close supervision. At this rating, it may be necessary for the employee to seek another position where his/her skills are better suited. Employee must improve performance within a reasonable period in order to retain the position. Corrective action must be documented.

**0-Does Not Meet Expectation/Poor:**

Employee does not meet job expectation. Performance has numerous deficiencies. Performance requires continual and direct supervision. Termination may be required or necessary at this level. Action must be documented to justify continual employment.

**NOTE: Managerial staff is required to provide documentation i.e. in the comment sections for job responsibilities, customary standards or goal accomplishments receiving a 0, 1, 2, 4 or 5 performance rating.**

**Weighting**

Part II, Part III, and Part V are weighted to indicate the relative importance in overall performance appraisal summary. Weighting provides a consistence process for assessing job performance. The weights for each part are:

- ◆ **Part II – Job Responsibilities – Technical Competence/Leadership Score Card- 40%**
- ◆ **Part III – Policy Compliance and Organizational Behavior – Customary Standards - 40%**
- ◆ **Part IV – Goal Accomplishments and Expected Goals - 20%**

*The total rating points for each of the parts are used calculate the overall performance score. The performance score determines the employee's merit increase percentage.*

**Performance Scoring**

How to determine the total Performance Score?

	A. Total Points	B. Total Possible Points	C. Total Weight Percentage (a ÷ b = c)	D. Assigned Weights Percentage	E. Total Percentage Score (c X d = e)
Part II – Job Responsibilities - Technical Competence/ Leadership Score Card				.40	
Part III – Policy Compliance and Organizational Behavior- Customary Standards				.40	
Part IV – Goal Accomplishments				.20	
Total Percentage Score (Total Col. E)					

- Step I: Total the number of points achieved for (1) Part I and (2) Part III and (3) Part IV.  
 Step II: Determine the Total Possible Points for each part.  
 Step III. Divide the total points by the Total Possible Points for (1) Part I and (2) Part III and (3) Part IV. You will arrive at the Total Weight Percentage.  
 Step III: Multiple the Total Weight Percentage by the weights assigned to each part.  
 Step IV: Total the Percentage Scores for each part to achieve the employee’s Total Percentage Score.  
 Step V: Look at the Total Percentage Score Range and the corresponding merit increase percentage. The employee will receive this merit increase percentage for their annual performance.

**NOTE:**

- ◆ **It is not necessary to complete Step V for the 90-day performance evaluations. A merit increase is not given for this evaluation.**
- ◆ **Employees must meet 50% or more of the total possible points in Part II, Part III and Part IV to receive a 4%, 5% or 6% merit increase.**
- ◆ **Vice President or above signature is required for a 4%, 5% or 6% merit increase.**

**PART II - JOB RESPONSIBILITIES - WEIGHT ASSIGNED – 40%**

**TECHNICAL COMPETENCE**

Every hospital employee is expected to display an acceptable level of technical competence in carrying out their assigned duties. The specific job responsibilities for this position are listed below.

**JOB SPECIFIC RESPONSIBILITIES:**

Stated Job Responsibilities - Billing Coordinator

**RATING POINTS**

<p>1. Perform routine and specifically assigned tasks related to the patient charge functions of the department in a timely and accurate manner.</p> <ul style="list-style-type: none"> <li>▪ Demonstrate current knowledge and understanding related to third party reimbursement criteria for EMS claims from the various reimbursing entities.</li> <li>▪ Insure that EMS personnel are appropriately trained related to required documentation, patient charges, and other reimbursement requirements to maximize authorized reimbursement potential</li> <li>▪ Follows up on deficiencies among EMS personnel related to above through their appropriate supervisor.</li> <li>▪ Receive and address questions or comments related to patient charges and other EMS billing issues from EMS customers, reimbursing entities, and others.</li> <li>▪ Coordinate and/or individually perform the accurate and timely input of patient data and other billing information as determined by the needs of the department and the availability of additional personnel to assist in this responsibility.</li> <li>▪ Accurately identify and then resolve EMS patient billing problems with appropriate UMC personnel.</li> </ul>	
<p>Comments:</p>	
<p>2. Prepare and maintain an orderly filing system of all billing and patient charge-related memorandums, reports, and correspondence originating from and/or directed to the EMS office.</p>	
<p>Comments:</p>	
<p>3. Demonstrate the ability to consistently make appropriate decisions on areas within the assigned realm of responsibility and seeks guidance and input from the EMS Administrative Council and others as needed.</p>	
<p>Comments:</p>	

<p>4. Prepare reports and statistical summaries in a thorough, accurate, and timely manner.</p> <ul style="list-style-type: none"> <li>▪ Transfers</li> <li>▪ Flights</li> </ul>	
<p>Comments:</p>	
<p>5. Research EMS patient records and other related documents and then distribute them to authorized persons while insuring patient confidentiality.</p>	
<p>Comments:</p>	
<p>6. Make appropriate decisions on minor departmental matters while insuring compliance with the administrative, financial, and political goals of the EMS department and UMC.</p>	
<p>Comments:</p>	
<p>7. Accepts and accurately completes all routine and special assignments in a timely manner as determined by the needs of the EMS department and UMC.</p>	
<p>Comments:</p>	
<p><b>Total Points – Job Responsibilities - Technical Competence/Leadership Score Card</b></p>	

**PART III - POLICY COMPLIANCE AND ORGANIZATIONAL BEHAVIORS - WEIGHT ASSIGNED – 40%**

Every employee is expected to support the Hospitals Mission, Vision and Value Statements by demonstrating concern for quality, productivity and responsiveness in his/her work as evidenced by:

	<b><u>RATING POINTS</u></b>
<p><b><u>Attitude</u></b></p> <p><b><u>Example Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Create a positive first impression.</li> <li>◆ See, Speak &amp; Smile.</li> <li>◆ <u>Always</u> speak positively – <u>no</u> negative comments.</li> <li>◆ Make each customer feel he is the most important person in the facility.</li> <li>◆ Exceed customer expectations.</li> <li>◆ Body language, tone and demeanor should always reflect a positive attitude. <i>Customers are not an interruption; they are our reason for being here.</i></li> </ul> <p style="text-align: center;"><b><u>Customers not only include patients and their family members, but your fellow paramedics and dispatchers.</u></b></p>	
<p>Comments:</p>	
<p><b><u>Communication</u></b></p> <p><i>Telephone:</i></p> <ul style="list-style-type: none"> <li>◆ Answer calls with “your department, and your name”.</li> <li>◆ Answer calls by the 2<sup>nd</sup> ring 90% of the time.</li> <li>◆ Stress courtesy by setting the example.</li> </ul> <p><i>Person-to-Person:</i></p> <ul style="list-style-type: none"> <li>◆ See, speak &amp; smile.</li> </ul>	

<ul style="list-style-type: none"> <li>◆ Introduce yourself by name.</li> <li>◆ Use “please”, “thank you”, “sir”, and “ma’am” when appropriate.</li> <li>◆ Use “Mr.” &amp; “Ms.” with last name when addressing customers – until given permission to use first name.</li> <li>◆ Use “Dr.” and last name for physician in front of patients.</li> <li>◆ Be aware of customer presence during conversation.</li> <li>◆ Be attentive to your tone of voice during conversation.</li> <li>◆ Use easily understood language – avoid acronyms or professional jargon.</li> </ul>	
<p>Comments:</p>	
<p><b><u>Responsiveness</u></b></p> <p><b><u>Example Behaviors</u></b></p> <ul style="list-style-type: none"> <li>◆ Directions: <ul style="list-style-type: none"> <li>◆ Ask if help is needed.</li> <li>◆ Escort or provide an escort to destination.</li> <li>◆ Provide your business card or name and phone number for further assistance.</li> </ul> </li> <li>◆ Respond to all customer inquiries within 48 hours.</li> <li>◆ Acknowledge voice mails and e-mails within 48 hours.</li> <li>◆ Give customers a realistic time frame for a return call.</li> <li>◆ When sending a fax, it is expected in 10 minutes. Let the recipient know if it will be longer.</li> </ul>	
<p>Comments:</p>	
<p><b><u>Courtesy</u></b></p> <p><b><u>Example Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Park in designated parking only.</li> <li>◆ Always thank the customer for choosing/visiting UMC.</li> <li>◆ Thank the customer for using Lubbock EMS.</li> <li>◆ Communicate &amp; apologize for any delays.</li> </ul> <p style="text-align: center;"><i><b>Rudeness is <u>never</u> accepted.</b></i></p>	
<p>Comments:</p>	

<p><b><u>Confidentiality</u></b></p> <p><b><u>Example Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Don't discuss business, employee or patient information in public settings.</li> <li>◆ Only authorized personnel can release patient information.</li> <li>◆ Conduct conversations with or about customers in private areas.</li> <li>◆ Access to patient information is limited only to employees involved in the patient's care.</li> <li>◆ Keep computer screens and patient charts out of public view.</li> <li>◆ Log off computer and keep passwords private.</li> <li>◆ Keep fax machines and printers out of public reach.</li> <li>◆ Be aware of students during conversations.</li> <li>◆ Do not discuss yours or other employee's evaluations.</li> <li>◆ Do not discuss yours or other employees pay rate.</li> <li>◆ Do not discuss disciplinary action either concerning you or other employees.</li> </ul>	
<p>Comments:</p>	
<p><b><u>TeamWork</u></b></p> <p><b><u>Example Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Be respectful of time away from work area (breaks, lunch, tardiness, leaving early). When you are away, someone else does your work.</li> <li>◆ Report to duty on time and ready to work.</li> <li>◆ Treat every co-worker as a professional. Recognize that we each have an area of expertise.</li> <li>◆ Don't be afraid to ask for help.</li> <li>◆ Be considerate of everyone's time – avoid last minute requests or changes.</li> <li>◆ Offer help when possible – be supportive.</li> <li>◆ Praise in public, coach in private.</li> <li>◆ Be receptive to constructive criticism.</li> <li>◆ Offer encouragement. Praise when a job is well done.</li> <li>◆ Recognize that teamwork is built on trust. Foster this trust on every occasion.</li> <li>◆ Respect and value different cultures and religious beliefs.</li> </ul>	
<p>Comments:</p>	

<p><b><u>Appearance</u></b></p> <p><b><u>Example Behaviors</u></b></p> <ul style="list-style-type: none"> <li>◆ Display your badge properly.</li> <li>◆ Dress cleanly, neatly, decently, and professionally.</li> <li>◆ Follow organizational and departmental dress code.</li> <li>◆ Keep your work area neat and tidy.</li> <li>◆ Keep food and drink in designated areas. Make sure that food and drink are properly covered during transport.</li> </ul> <p style="text-align: center;"><i>Your dress influences your attitude and the perception of care by others.</i></p>	
<p>Comments:</p>	
<p><b><u>Ownership</u></b></p> <p><b><u>Example Behaviors</u></b></p> <ul style="list-style-type: none"> <li>◆ Create an open and friendly environment.</li> <li>◆ Know and understand the responsibilities of your job. Take charge and accept those responsibilities.</li> <li>◆ Be supportive of the team.</li> <li>◆ Say what you mean-mean what you say-prove it by your actions.</li> <li>◆ Do the right job at the right time.</li> <li>◆ Use scripting when appropriate.</li> <li>◆ Keep all areas (hallways, stairwells, etc.) clean and tidy. Pick up litter.</li> <li>◆ Strive for improvement.</li> <li>◆ Take pride in UMC as if you owned it.</li> <li>◆ Represent UMC positively in the community.</li> <li>◆ Represent EMS positively in the community.</li> </ul>	
<p>Comments:</p>	
<p><b>Total Points – Policy Compliance and Organizational Behaviors</b></p>	
<p><b><u>Corporate Compliance Program, Patient Safety Plan, Employee Safety Plan</u></b>  These Policy Compliances require only a <b><u>YES</u></b> or <b><u>NO</u></b> response;</p> <p><b>Every employee is expected to meet all of these performance compliances. Managers will evaluate employees using a <u>YES</u> or <u>NO</u> response instead of the 1 – 5 performance ratings. <u>YES</u> indicates that the employee has met, if applicable,</b></p>	

**the described behaviors. These performance compliances will not be used when determining the Total Points for the Policy Compliance and Organizational Behaviors.**

**Corporate Compliance Program**

**Behaviors:**

- ◆ Follows the Compliance Program standards designed to prevent, detect, correct and discipline non-compliant behavior:
- ◆ Participates in initial and continuing educational activities related to the Compliance Plan.
- ◆ Complies with all applicable laws, regulations, policies and procedures.
- ◆ Reports known or suspected violations of the law or the Compliance Plan and makes that report in good faith with no malicious intent
- ◆ Completes the Compliance annual in-service and Acknowledge form.

Comments:

**Patient Safety Plan**

Participates in the hospital-wide integrated, **Patient Safety Plan**, in all aspects of patient care delivery and support, in order to proactively identify, reduce and manage risk.

**Behaviors:**

- ◆ Participates in ongoing education activities related to Patient Safety.
- ◆ Participates in the design, development and implementation of risk reduction strategies.
- ◆ Reports unusual occurrences utilizing the appropriate documents, and refers them to Risk Management, Pharmacy, etc.
- ◆ Completes the Patient Safety annual In-service.

Comments:

**Employee Safety Plan**

Provides or facilitates in providing a clean, safe, quiet and secure workplace environment for all.

**Behaviors:**

- ◆ Reports any unusual/deficient workplace environment issues to your immediate supervisor or other location as defined in Hospital and Departmental Policy and Procedures. (i.e. job-related hazards).
- ◆ Reports workplace injuries to immediate supervisor or the Employee Health Department.
- ◆ Corrects and/or reports unsafe, unsecured or unclean environment to immediate supervisor and/or Environmental Services and/or Facility Services.
- ◆ Disposes of hazardous chemicals or wastes according to hospital and departmental policies. (i.e., proper use of red bags and sharps disposal containers.)
- ◆ Keeps work area neat and organized to maintain a safe workplace environment.
- ◆ Completes the Environment of Care annual in-services.

Comments:

**PART IV - GOAL ACCOMPLISHMENTS AND EXPECTED GOAL ACCOMPLISHMENTS WEIGHT ASSIGNED- 20%**

This part reviews the established goals for the performance appraisal period.

Defined Goal (s)	Results and Comments	Rating Points

<b>Total Points – Goal Accomplishments</b>	
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**EXPECTED GOAL ACCOMPLISHMENTS FOR PERFORMANCE YEAR: \_\_\_\_\_**

Defined Goal (s) Expected Goal (s)	Expected Outcome or Results

**PART V – MANDATORY REQUIREMENTS**

**This part reviews the mandatory requirements/compliance reminders and development and improvement plans:**

**MANDATORY REQUIREMENTS/COMPLIANCE REMINDERS:**

Check appropriate box (es)

In-Services	
Educational Requirements (i.e., leadership)	
TB Test and/or other Employee Health Test	
License, Registration, Certification	
Age-specific core competency compliance	
Core competencies <ul style="list-style-type: none"><li>▪ Is familiar with the Environment of Care and successfully passed an exam covering each topic.</li></ul>	

**NOTE: An Educational Resource development training course sheet displaying the above training/education should be attached to the performance appraisal.**

**DEVELOPMENT NEED AND IMPROVEMENT PLANS:**

(Listed below is the specific agreed upon activities to improve areas of performance. Record developmental activities and action plans to further enhance the employee’s capabilities and competencies, which include: in-service, outside training and education, self-developments, etc.)

**PERFORMANCE SCORE SHEET:**

	A. Total Points	B. Total Possible Points	C. Total Weight Percentage (a ÷ b = c)	D. Assigned Weights Percentage	E. Total Percentage Score (c X d = e)
Part II – Job Responsibilities - Technical Competence/ Leadership Score Card				.40	
Part III – Policy Compliance and Organizational Behavior- Customary Standards				.40	
Part IV – Goal Accomplishments				.20	
Total Percentage Score (Total Col. E)					

*Determine which merit increase range the total score from above falls into to determine employees merit increase.*

**TOTAL**

**PERCENT SCORE RANGE**

**MERIT INCREASE**

95-100%	6.0%
85-94%	5.0%
70-84%	4.0%
55-69%	3.0%
40-54%	2.0%
25-39%	1.0%
0-24%	0.0%

**MERIT INCREASE FOR THIS EVALUATION = \_\_\_\_\_**

**NOTE:**

- ◆ **It is not necessary to complete Step V for the 90-day performance evaluations. A merit increase is not given for this evaluation.**
- ◆ **Employees must meet 50% or more of the total possible points in Part II, Part III and Part IV to receive a 4%, 5% or 6% merit increase.**
- ◆ **Vice President or above signature is required for a 4%, 5% or 6% merit increase.**

**ADDITIONAL COMMENTS:**

**SIGNATURES:**

Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Appraiser's Signature \_\_\_\_\_ Date \_\_\_\_\_

Manager/Director's Signature \_\_\_\_\_ Date: \_\_\_\_\_

\*Signature signifies receipt of appraisal only, and does not indicate agreement.

## **PERFORMANCE EVALUATION DOCUMENTATION**

### **CHECKLIST**

The Performance Evaluation Documentation Checklist ensures that all appropriate documentation is complete and attached to the performance appraisal form.

Employee Name: \_\_\_\_\_ Department: \_\_\_\_\_

Check off all of the appropriate performance appraisal documentation that is included with your checklist:

- Job Description/Performance Appraisal Form**
  - 90-Day Evaluation- include Non-Clinical Initial Hire/Transfer Competency Worksheet
    - Completed Employee Favorites List on the Intranet
  - Annual Evaluation
- Education Resources (Staff Development) Training Sheets(s)**  
Send all certificates, registrations, and memberships to this department.
- Individual Competency Profile (if applicable for Clinical Staff)**
- Technical Procedure Privileging/Skills Checklist for First Year Annual Appraisals (if applicable for Clinical Staff)**
- Personnel Action Form ( Merit Increase or Salary Adjustments )**  
0-3% increases - Department Director Only  
4%, 5%, 6% increases/salary adjustments - Administrative Signature Required
- Job Description/Performance Appraisal ( Title changes/ New Positions Only)**  
A new Job Description/ Performance Appraisal Form is required for all position changes.

**Note:** The Human Resources Department will return all paperwork if this sheet is not attached to the performance appraisal paperwork.