

## Clinica Family Health Services ADMINISTRATION'S RECEPTIONIST COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. CUSTOMER SERVICE</b> <b>Competency:</b> Provides consistent, professional, and hospitality driven customer service to both internal and external customers. <div style="float: right; text-align: right;"> <b>Key:</b>    1 = No knowledge/Experience    3 = Knowledge/Done with assistance                         2 = Knowledge/No experience    4 = Knowledge/Done independently           </div>							
Greets and checks in every patient and visitor ensuring a great customer experience.	1	2	3	4			
Answers phone according to Clinica's policy	1	2	3	4			
Respectful language and tone used w/ patients & other staff (hospitality)	1	2	3	4			
<b>2. ADMINISTRATIVE DUTIES</b> <b>Competency:</b> Provides support to staff by maintaining building standards, organizing communication distribution (both mail and voicemail), and coordinating Inpatient encounters and information. <div style="float: right; text-align: right;"> <b>Key:</b>    1 = No knowledge/Experience    3 = Knowledge/Done with assistance                         2 = Knowledge/No experience    4 = Knowledge/Done independently           </div>							
Open Administration building doors before 8:00 a.m. and lock doors at 5:00 p.m.	1	2	3	4			
Maintain the neatness and cleanliness of reception lobby throughout the day.	1	2	3	4			
Check all conference rooms before the end of the day	1	2	3	4			
Lock training rooms at the end of the day	1	2	3	4			
Provide weekly estimates on deadlines and progress on projects. Notify lead and supervisor if a deadline will not be met.	1	2	3	4			
Receive and distribute external mail and internal mail from all clinics	1	2	3	4			
Create and enter Inpatient encounters	1	2	3	4			

## Clinica Family Health Services AGE COMPETENCIES

Employee: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. NEWBORN – 2 YEARS</b> <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently </div>							
Explains procedure to parent/guardian prior to any procedure or assessment.	1	2	3	4			
Uses appropriate accessories for the newborns size and mobility.	1	2	3	4			
DOES NOT leave infant unattended on exam table; keeps a hand on the baby.	1	2	3	4			
<b>2. TODDLER 2 - 4 YEARS</b> <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently </div>							
Explains procedure to parent/guardian prior to assessment.	1	2	3	4			
Explains actions to the patient's parent before starting.	1	2	3	4			
Speaks at eye level with the toddler in a calm voice.	1	2	3	4			
Uses language the child may understand.	1	2	3	4			
Uses appropriate accessories for toddler's size and mobility.	1	2	3	4			
DOES NOT leave toddler unattended.	1	2	3	4			
<b>3. CHILD 5 - 12 YEARS</b> <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently </div>							
Educates parent/guardian prior to the assessment.	1	2	3	4			

## Clinica Family Health Services BEHAVIORAL HEALTH PROFESSIONAL (BHP) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Provides brief intervention and consultation in real time to patients and interventions provided are helpful to both patients and referring members of the care team.	1	2	3	4			
Responsible for the Assessment, treatment planning and episodes of brief, goal focused therapy for established Clinica patients.	1	2	3	4			
Actively participates and utilizes supervision feedback (both from the CMD and the BH Program Manager) to improve patient care.	1	2	3	4			
Responsible for crisis intervention counseling as referred by providers. Acts as a consultant to other staff on skillful and effective intervention with patients, including crisis intervention.	1	2	3	4			
Manages/monitors mental health referrals to CMHC’s for patients with higher behavioral health needs.	1	2	3	4			
Responsible for resolving conflicts in a professional manner and is a model for strong interpersonal communication skills with all staff.	1	2	3	4			
Manages and strives to achieve the target number of patient encounters.	1	2	3	4			
Satisfies minimum documentation requirements for all services rendered.	1	2	3	4			
Responsible for follow-up of high-risk patients, especially patients with depression as indicated by the depression registry’s targeted outcome measures.	1	2	3	4			
Functions as a group visit team health educator, specifically for patients with chronic pain, depression and anxiety.	1	2	3	4			
Works to engage and coordinate care for complex patients with complex and co-morbid mental and physical health conditions.	1	2	3	4			

## Clinica Family Health Services BILLING SPECIALIST COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively and professionally with co-workers and patients in line with Clinica’s hospitality values.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Alert Manager to re-occurring problems resulting in zero payments	1	2	3	4			
Process Refunds or take backs as needed following refund procedure	1	2	3	4			
Get patients with large balances onto budget / payment plan	1	2	3	4			
Report to Supervisor when not on track for meeting deadlines, provide weekly estimates on closing deadlines and progress	1	2	3	4			
Answer phones following Clinica’s policy	1	2	3	4			
Return patient phone calls in less than 2 business days	1	2	3	4			
Pt adjustments and fix accounts etc.	1	2	3	4			
Credit card transactions. Including making copies for finance and pts.	1	2	3	4			
Process and enter Payments on Account “POA” and Encounter payments received from sites.	1	2	3	4			
Run and work Daily billing reports	1	2	3	4			
Run and work Monthly billing reports	1	2	3	4			
Work EPM tasks	1	2	3	4			
Pack Iron Mountain boxes for storage on a monthly basis	1	2	3	4			
Proficient in the use of My Clinica Connection	1	2	3	4			
Work patient responses to bills via mail or via HRM	1	2	3	4			
Work pt billing issues from sites via interoffice (and from screeners)	1	2	3	4			
Web portal Medicaid verifications	1	2	3	4			
Colorado Access web site verifications as needed	1	2	3	4			
Data entry including posting mail patient payments, cash receipt folders, ERA and zero payments	1	2	3	4			

## Clinica Family Health Services CASE MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. CASE MANAGEMENT DUTIES</b> <b>Competency:</b> Effectively, accurately and consistently demonstrates the ability to successfully case manage according to Clinica’s policies and procedures							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Employee completed training in and demonstrates an appropriate utilization of motivational interviewing and patient centered communication skills with patients	1	2	3	4			
Employee is able to determine when a situation is out of their scope of practice and appropriately notifies the BHP, PCP, or nurse per Behavioral Health policies and procedures. (drug/alcohol use, child abuse, domestic violence, etc.)	1	2	3	4			
Demonstrates a basic knowledge and ability to utilize Behavioral Health policies and procedures.	1	2	3	4			
Demonstrates constructive collaboration between clinic teams and CM team.	1	2	3	4			
Demonstrate an ability to constructively communicate and work well with other Clinica staff.	1	2	3	4			
Proficient in utilizing My Clinica Connection.	1	2	3	4			
Demonstrates timely attendance for work, groups, and scheduled meetings.	1	2	3	4			
Demonstrates competent utilization and NextGen documentation of community resources and referrals.	1	2	3	4			
Demonstrates an understanding of measurement and quality improvement processes.	1	2	3	4			
Demonstrates knowledge related to patient education and group facilitation process.	1	2	3	4			
Demonstrates an excellent understanding of Prenatal Plus policies and procedures.	1	2	3	4			

## Clinica Family Health Services CERTIFIED CODER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Alert Manager to re-occurring problems resulting in zero payments	1	2	3	4			
Report to Supervisor when not on track for meeting deadlines, provide daily estimates on closing deadlines and progress	1	2	3	4			
Daily accept all charges and ensure coding is complete and correct	1	2	3	4			
Task Providers as needed for missing or incomplete coding	1	2	3	4			
Run and work Missing and Incomplete report	1	2	3	4			
Run and work Daily billing reports	1	2	3	4			
Run and work Monthly billing reports	1	2	3	4			
Accept and work EMR and EPM tasks	1	2	3	4			
Adjustments and fix accounts etc.	1	2	3	4			
Answer phones following Clinica’s policy	1	2	3	4			
Return patient phone calls in less than 2 business days	1	2	3	4			
Create and enter coding for Inpatient encounters	1	2	3	4			
Call inpatient patient to get missing info as needed	1	2	3	4			
Med 178s - many steps outlined separately	1	2	3	4			
Home visits	1	2	3	4			

## Clinica Family Health Services PERFORMANCE REVIEW RN ORIENTATION and COMPETENCIES CHECKLIST

Nurse: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Clinic: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This skill checklist is a required component of orientation, used to verify competence to perform skills. This checklist must remain in the clinic at all times. The **employee** is responsible for using the orientation checklist each orientation day and ensuring skills are validated by his/her preceptor/educator. The preceptor is responsible for initialing and dating each **MET/NOT MET** column and for documenting signature with initials on the last page at the close of the orientation period. If performance is unable to be validated, the preceptor must note this in the comment section and notify the manager/director or designee. **SECTIONS 1 – 4 TO BE COMPLETED WITHIN THE FIRST 90 DAYS & BEFORE NURSE WORKS INDEPENDENTLY. REMAINDER OF ITEMS TO BE CHECKED OFF WITHIN 6 MONTHS FROM DATE OF HIRE.***

*The employee is responsible for performing the self-evaluation. The employee should circle the number that **BEST** corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. <div style="float: right; text-align: right;"> <b>Key:</b>            1 = No knowledge/Experience            2 = Knowledge/No experience            3 = Knowledge/Done with assistance            4 = Knowledge/Done independently         </div>							
Education/advice given is culturally sensitive.	1	2	3	4			
Presents patient case to provider w/ appropriate detail & efficiency.	1	2	3	4			
Respectful language and tone used w/ patients & other staff (hospitality)	1	2	3	4			
Assist Nurse Team Managers with pod patient flow, including nurse visits, co-visits and group visits.	1	2	3	4			
Provide direct patient care through maintaining own schedule of nurse visits using nursing protocols.	1	2	3	4			
Manage daily nurse schedule in conjunction with Nurse Team Manager; participate in daily pod huddles and weekly team meetings.	1	2	3	4			
Demonstrates understanding & appropriate use of active schedule management principles.	1	2	3	4			
Address all tasks per guidelines, requesting assistance from other team members & delegating as necessary to complete tasks in appropriate time frame.	1	2	3	4			
Proficient in the use of My Clinica Connection.	1	2	3	4			
Huddles with care team &/or provider at the beginning of the shift.	1	2	3	4			
<b>2. TELEPHONE TRIAGE</b> <b>Competency:</b> Using standardized nurse triage protocols, review & respond to patient messages or calls respectfully/appropriately, assess symptoms properly, and provide appropriate guidance for follow-up <div style="float: right; text-align: right;"> <b>Key:</b>            1 = No knowledge/Experience            2 = Knowledge/No experience            3 = Knowledge/Done with assistance            4 = Knowledge/Done independently         </div>							

## Clinica Family Health Services CLINIC OPERATIONS MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. MANAGEMENT RESPONSIBILITIES</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven management standards while completing all required tasks.							
					<b>Key:</b>	<b>1</b> = No knowledge/Experience <b>2</b> = Knowledge/No experience	<b>3</b> = Knowledge/Done with assistance <b>4</b> = Knowledge/Done independently
Participates in the development and motivation of staff by actively applying coaching and training techniques.	1	2	3	4			
Thorough and detailed knowledge of duties performed by direct reports.	1	2	3	4			
Provides thorough orientation and training of non-clinical activities and procedures to new Top of the Line employees.	1	2	3	4			
Identifies competency, knowledge and talent gaps held by Top of the Line staff related to operational procedures and performs or coordinates training for those gaps.	1	2	3	4			
Creates and implements monitoring plan for staff performance.	1	2	3	4			
Ensures Office Techs are securely maintaining cash and following the Cash Control procedures via monthly audits.	1	2	3	4			
Ensures Office Techs are following encounter control processes via audits.	1	2	3	4			
Educates staff on scheduling guidelines when it is determined that an employee is not following guidelines.	1	2	3	4			
Proficient in using, helping, and understanding My Clinica Connection. Serves in the MCC Superuser role	1	2	3	4			
Ensures Medical Records staff are performing and reporting the Medical Records audit monthly.	1	2	3	4			
Ensures Medical Records staff is organized and performing to Clinica standards.	1	2	3	4			
Demonstrates proper handling and storage of vaccines.	1	2	3	4			
Supervises Clinic Operations Tech, Office techs, Referral Case Managers, Medical Record Techs, and other operations staff as assigned through the learned coaching methods.	1	2	3	4			



## Clinica Family Health Services CLINIC OPERATIONS TECHNICIAN (COT) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b>	<b>1</b> = No knowledge/Experience <b>2</b> = Knowledge/No experience	<b>3</b> = Knowledge/Done with assistance <b>4</b> = Knowledge/Done independently
Provide back up to the Clinic Operations Manager when the Clinic Operations Manager is out of the office.	1	2	3	4			
Open and distribute mail.	1	2	3	4			
Assists COM in maintaining Joint Commission compliance.	1	2	3	4			
Accurate and timely completion of CLIA and OSHA daily, weekly and monthly tasks/logs	1	2	3	4			
Manage medical and office supply inventory at a level that assures available supplies for site use.	1	2	3	4			
Maintains supply storage areas.	1	2	3	4			
Processes cash deposits accurately and makes bank deposits timely	1	2	3	4			
Monitors for and reports errors in cash deposits to supervisor.	1	2	3	4			
Proficient in using, helping, and understanding My Clinica Connection.	1	2	3	4			
Maintains petty cash at site at a level that meets the needs of the clinic.	1	2	3	4			
Assist Clinic Operations Manager in training new employees and continuing education with current employees on operating procedures.	1	2	3	4			
Assists Clinic Operations Manager in maintaining patient education materials.	1	2	3	4			
Assist with initial orientation of new employees (building tours, OSHA training, assigning and labeling mailboxes, coding backdoor keypad, etc.)	1	2	3	4			
Other miscellaneous clinic duties as assigned by the COM	1	2	3	4			



Supervisor: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. TELEPHONE SKILLS</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members both over the phone and in person. Requests, tracks, and passes along appropriate information.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Maintains phone console with updated information, names and extensions.	1	2	3	4			
Screen callers to determine caller's needs.	1	2	3	4			
Registration of new patients.	1	2	3	4			
Verify and update patient demographics with each patient related call	1	2	3	4			
Verify and update patient insurance information	1	2	3	4			
Answer caller questions according to protocol	1	2	3	4			
Proficient in the use of My Clinica Connection.							
Schedule, cancel, and re-schedule appointments according to scheduling guidelines.	1	2	3	4			
Take and forward messages to the appropriate party.	1	2	3	4			
Routes calls according to protocol: Clinics, Dental, Billing, Pharmacy, Financial	1	2	3	4			
Answers Incoming Calls according to protocol	1	2	3	4			
Understands expectations on schedule evaluation and calls per hour goals	1	2	3	4			
<b>2. CUSTOMER SERVICE</b> <b>Competency:</b> Demonstrates effective internal and external communication skills and teamwork with an emphasis on hospitality values.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently

## Clinica Family Health Services COMMUNICATIONS SPECIALIST MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Fully trained and able to perform as Communications Specialist	1	2	3	4			
Implements appointment schedules as provided by Clinic Operations Director on a daily, weekly, basis to ensure that scheduling practices are meeting the organizations objectives around scheduling and payer mix	1	2	3	4			
Performs audits, prepares reports and develops quality improvement plans based on Communications Center performance data	1	2	3	4			
Prepares and provides continued training to Communications Specialist staff.	1	2	3	4			
Continually assesses of the effectiveness of communication and training techniques used with staff	1	2	3	4			
Proficient in the use of My Clinica Connection. Conducts MCC training for new CC Specialists.	1	2	3	4			
Establishes and maintains Communications Specialist goals	1	2	3	4			
Creates a positive work environment for staff and enthusiastically facilitates change in a timely manner	1	2	3	4			
Creatively engages in problem solving	1	2	3	4			
Attends and is prepared for all required meetings, committees and trainings	1	2	3	4			
Coordinates resolution of IT and phone problems with the IT Department	1	2	3	4			
Maintains collaborative working relationship with all sites. Ensuring the phone needs of the organization are being met	1	2	3	4			
Has work knowledge of the phone system and system reporting software including the ability to edit messages as needed.	1	2	3	4			



Supervisor: \_\_\_\_\_

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional standards while completing all required duties.							
					<b>Key:</b>	<b>1</b> = No knowledge/Experience <b>2</b> = Knowledge/No experience	<b>3</b> = Knowledge/Done with assistance <b>4</b> = Knowledge/Done independently
<b><i>Routine Procedures:</i></b>	1	2	3	4			
<b>Set Up:</b> Dental Assistant is able to prepare operatory and instruments for routine general dentistry procedures.	1	2	3	4			
<b>Practice:</b> Dental Assistant is able to anticipate dentist's needs during the procedure.	1	2	3	4			
<b><i>Radiology:</i></b>	1	2	3	4			
<b>Safety:</b> Dental Assistant uses safe radiation exposure practices (lead apron, personal safety, correct exposure parameters, wear radiation badges).	1	2	3	4			
<b>Accuracy:</b> Dental Assistant is able to expose radiographs of good diagnostic quality 90% of the time.	1	2	3	4			
<b><i>Sterilization:</i></b>	1	2	3	4			
<b>Laboratory:</b> Dental Assistant is able to demonstrate correct procedures for cleaning and sterilizing dental instruments. (Includes cleaning, preparation and use of autoclave.)	1	2	3	4			
<b>Testing:</b> Dental Assistant is able to demonstrate correct procedure for testing sterilization equipment for adequate sterilization. Able to demonstrate correct documentation procedures.	1	2	3	4			
<b><i>Operatory, Disinfection, and Maintenance:</i></b>	1	2	3	4			
<b>Opening Procedure:</b> Dental Assistant is able to prepare dental operatory at start of day.	1	2	3	4			
<b>Closing Procedure:</b> Dental Assistant is able to describe correct dental clinic area closing procedure.	1	2	3	4			
<b><i>Scheduling:</i></b>	1	2	3	4			

## Clinica Family Health Services DENTAL ASSISTANT TEAM MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.							
					<b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience		3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
<b>Management Duties:</b>	1	2	3	4			
Completes competency assessments on all new employees at end of three-month initial period	1	2	3	4			
Completes performance appraisals yearly. Conducts all DA reviews timely.	1	2	3	4			
Committees and meetings	1	2	3	4			
Managing DA/EDDA schedules: understanding FTE requirements, PTO requests and daily schedules	1	2	3	4			
Has completed organizational DATM training	1	2	3	4			
Oversees and participates in the orientation, education, and training of new and established staff.	1	2	3	4			
Demonstrates understanding of how to use email and understands obligation as an employee to read/respond to email	1	2	3	4			
Signs off on staff timesheets timely and accurately. Is proficient with UltiPro.	1	2	3	4			
Audits patients' charts for documentation and accuracy.	1	2	3	4			
Conducts conflict resolution with assistance from DOM, CD/DD and HR.	1	2	3	4			
Investigates all YCC cards with staff and patients. And processes per protocol.	1	2	3	4			
Collaborates with Dentists/Hygienists to obtain feedback for employee reviews as needed.	1	2	3	4			
Demonstrates understanding of Human resources policies and procedures.	1	2	3	4			

## Clinica Family Health Services DENTAL COMMUNICATIONS SPECIALIST COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Answer incoming calls professionally.	1	2	3	4			
Verify and update patient demographics with each patient related call as needed.	1	2	3	4			
Screen callers to determine caller’s needs.	1	2	3	4			
Schedule, cancel, confirm or reschedule appointments according to the scheduling guidelines.	1	2	3	4			
Answer caller questions according to protocol.	1	2	3	4			
Take and forward messages to the appropriate party.	1	2	3	4			
Provide exceptional customer service to all callers.	1	2	3	4			
Maintain cultural sensitivity when dealing with customers and coworkers.	1	2	3	4			
Respond to customer inquiries.	1	2	3	4			
Task care teams according to protocol.	1	2	3	4			
Submit Medicaid PARs within a timely manner.	1	2	3	4			
Oversee task work log to ensure PARs are adequately managed.	1	2	3	4			
Communicate Medicaid PAR approvals/denials to the appropriate care team members.	1	2	3	4			
Communicate and escalate customer service issues to manager when appropriate.	1	2	3	4			



Supervisor: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently		
Collects accurate patient payment & records accurately, completely & timely.	1	2	3	4			
Processes patient encounter report on a daily basis & checks for accuracy & completeness. Tracks missing encounters.	1	2	3	4			
Monitors patient waiting area for cleanliness.	1	2	3	4			
Verifies demographic information, UDS, HIPAA and pay codes at check-in and when on telephone.	1	2	3	4			
Maintains own cash bank & follows procedure.	1	2	3	4			
Schedules appointments in a timely manner & according to protocol.	1	2	3	4			
Answers Dental line within 3 rings and handles the call appropriately when possible.	1	2	3	4			
Assists Clinical team as needed.	1	2	3	4			
Greets and processes patient information upon arrival, in a professional manner & provides customer service.	1	2	3	4			
Monitors the necessity for patient financial screening and refers when appropriate.	1	2	3	4			
Works closely with Dental Assistants to manage patient flow.	1	2	3	4			
Maintains current knowledge of insurances accepted by Clinica.	1	2	3	4			
Copies documents when necessary.	1	2	3	4			
Manage late patients according to procedure.	1	2	3	4			
Monitors visitors sign in & sign out.	1	2	3	4			
Attends to the customer's needs or finds someone who will.	1	2	3	4			

## Clinica Family Health Services DENTAL OPERATIONS MANAGER (DOM) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. MANAGEMENT RESPONSIBILITIES</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven management standards while completing all required tasks.							
					Key:	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Participates in the development and motivation of staff by actively applying coaching and training techniques.	1	2	3	4			
Thorough and detailed knowledge of duties performed by direct reports	1	2	3	4			
Provides thorough orientation and training of non-clinical activities and procedures to new Top of the Line employees.	1	2	3	4			
Identifies competency, knowledge and talent gaps held by Top of the Line staff related to operational procedures and performs or coordinates training for those gaps.	1	2	3	4			
Creates and implements monitoring plan for staff performance.	1	2	3	4			
Ensures Office Techs are securely maintaining cash and following the Cash Control procedures via monthly audits.	1	2	3	4			
Ensures Office Techs are following encounter control processes via audits.	1	2	3	4			
Oversees the timely completion and accuracy of Medicaid PARs, including reviewing the weekly PAR report	1	2	3	4			
Communicates any known risks or problems with the Medicaid PAR process to the Dental Operations Director	1	2	3	4			
Oversees the Dental Call Center’s customer service and data metrics	1	2	3	4			
Communicates any known risks or problems with the Dental Call Center to Dental Operations Director	1	2	3	4			
Educates staff on scheduling guidelines when it is determined that an employee is not following guidelines.	1	2	3	4			
Ensures Medical Records staff are performing and reporting the Medical Records audit monthly.	1	2	3	4			



## Clinica Family Health Services DENTAL OPERATIONS TECHNICIAN (DOT) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<div>1. COMMUNICATION &amp; PRODUCTIVITY</div> <div>Competency: Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.</div> <div>Key: 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div>							
Provide back up to the Dental Operations Manager when the DOM is out of the office.	1	2	3	4			
Open and distribute mail.	1	2	3	4			
Assists DOM in maintaining Joint Commission compliance.	1	2	3	4			
Accurate and timely completion of CLIA and OSHA daily, weekly and monthly tasks/logs	1	2	3	4			
Manage medical and office supply inventory at a level that assures available supplies for site use.	1	2	3	4			
Maintains supply storage areas.	1	2	3	4			
Assist Dental Operations Manager in training new employees and continuing education with current employees on operating procedures.	1	2	3	4			
Assists Dental Operations Manager in maintaining patient education materials.	1	2	3	4			
Assist with initial orientation of new employees (building tours, OSHA training, assigning and labeling mailboxes, coding backdoor keypad, etc.)	1	2	3	4			
Other miscellaneous clinic duties as assigned by the DOM	1	2	3	4			
Assist with audits as assigned by the DOM	1	2	3	4			
Monitors clinic for safety issues and reports to DOM	1	2	3	4			
Responsible for minutes for site meetings as assigned by the Dentak Operations Director or Dental Operations Manager.	1	2	3	4			
Assists in the development of new and revised procedures and PDSAs.	1	2	3	4			
Manages Lab Assignments	1	2	3	4			

## Clinica Family Health Services DENTAL RECORDS COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.							
Understands scanning and data entry of dental medical records information.	1	2	3	4			
Ability to use and understand the scheduling history screen.	1	2	3	4			
Pull charts for the chart request list – daily, plus next day appointments.	1	2	3	4			
Proficient with MS Outlook and Word.	1	2	3	4			
Processes incoming mail, voicemail, faxes and interoffice mail.	1	2	3	4			
Processes external/internal patient records requests according to guidelines.	1	2	3	4			
Inform patients of the process to obtain dental records.	1	2	3	4			
Acts as back up for front desk.	1	2	3	4			
Demonstrates competent knowledge of EDR.	1	2	3	4			
Understands and facilitates chart retirement accurately.	1	2	3	4			
Basic knowledge of front desk duties.	1	2	3	4			
Good customer service skills.	1	2	3	4			

**Key:**

1 = No knowledge/Experience  
2 = Knowledge/No experience

3 = Knowledge/Done with assistance  
4 = Knowledge/Done independently

## Clinica Family Health Services FINANCIAL SCREENER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. REGISTRATION</b> <b>Competency:</b> Demonstrates the ability to successfully register patients. <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience              2 = Knowledge/No experience              3 = Knowledge/Done with assistance              4 = Knowledge/Done independently           </div>							
Demonstrates the ability to register a patient.							
Creates a financial file.							
Notes are completed for the file.							
Knows and follows the procedure to register a confidential patient.							
Knows and follows the procedure for the HIPAA form.							
Knows and follows the procedure for the Consent to Treat form.							
Knows and follows the procedure for the Learning Needs Assessment form.							
Creates a medical chart.							
Knows and follows the procedure UDS							
<b>2. UPDATED SCREENING</b> <b>Competency:</b> Demonstrates the ability to perform updated screenings. <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience              2 = Knowledge/No experience              3 = Knowledge/Done with assistance              4 = Knowledge/Done independently           </div>							
Knows and follows the procedure.							
Demonstrates knowledge of what information is needed in NextGen and financial file.							
<b>3. APPLICATION PROCESS AND PROCEDURES</b> <b>Competency:</b> Demonstrates knowledge of all application processes and procedures and adheres to them. <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience              2 = Knowledge/No experience              3 = Knowledge/Done with assistance              4 = Knowledge/Done independently           </div>							
Knowledge on how to correctly fill out the application for individual programs including PEAK and Connect for Health Colorado.							
Knows what documentation is needed for each individual program..							

## Clinica Family Health Services GROUP VISIT CASE MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<div>1. COMMUNICATION &amp; PRODUCTIVITY</div> <div>Competency: Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.</div> <div>Key: 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div>							
Employee will demonstrate timely attendance for work and scheduled meetings	1	2	3	4			
Employee demonstrates a basic understanding of group dynamics.	1	2	3	4			
Employee coordinates recruitment and planning for Centering Groups	1	2	3	4			
Employee participates as group visit health education facilitator for Centering groups and others as needed.	1	2	3	4			
Employee assists with self-management goal setting with Centering patients.	1	2	3	4			
Employee facilitates pod follow-up on Centering patients.	1	2	3	4			
Employee provides training to other CMs on facilitating Centering groups	1	2	3	4			
Employee collects, compiles, and reports on data from Centering groups for quality improvement processes	1	2	3	4			
Employee serves as liaison between Clinica and community agencies such as WIC, SAN-lactation, and Head start	1	2	3	4			
Employee demonstrates basic knowledge of interventions with high risk OB patients with smoking and nutrition risk factors.	1	2	3	4			
Employee demonstrates a basic understanding of Prenatal Plus policies and procedures.	1	2	3	4			
Employee demonstrates a basic understanding of prenatal data collection guidelines.	1	2	3	4			
Employee assures that prenatal data collection is initiated and completed according to the timeframe required by Prenatal Plus and Clinica guidelines.	1	2	3	4			

## Clinica Family Health Services HOME VISIT CASE MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

***The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.***

***The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.***

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks. <b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently							
Competent at locating and monitoring supplies in HV supply bag.	1	2	3	4			
Brings HV supply bag to HV.	1	2	3	4			
Competent at locating HV documents (HV Worksheet, HV Checklist) on public drive.	1	2	3	4			
Prints HV Worksheet and brings to HV.	1	2	3	4			
Accurately completes page 1 of Home Visit Worksheet before HV.	1	2	3	4			
Obtains driving directions to HV and maintains record of mileage for reimbursement.	1	2	3	4			
Correctly identifies patient pod and care team and enters on HV Worksheet.	1	2	3	4			
Competent at determining if patient has future in-clinic f/u appointment.	1	2	3	4			
Contacts pod CM/BHP, requesting relevant patient info.	1	2	3	4			
Reviews and prints (or obtains from HV Scheduler) Discharge Summary and brings summary to HV.	1	2	3	4			
Prints active and inactive med list from NextGen (including Clinica and hospital discharge meds) and brings lists to HV.	1	2	3	4			

## Clinica Family Health Services HYGIENIST ON THE POD ASSISTANT (HOPA) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b>	<b>1</b> = No knowledge/Experience <b>2</b> = Knowledge/No experience	<b>3</b> = Knowledge/Done with assistance <b>4</b> = Knowledge/Done independently
Quality scheduling of patients	1	2	3	4			
Accurate preparation for the patient visit	1	2	3	4			
Excellent customer service upon patient arrival and during the visit	1	2	3	4			
Follow appropriate telephone protocol for patients and employees.	1	2	3	4			
Initiate, update and maintain electronic dental record.	1	2	3	4			
Dental health record related tasks including but not limited to scanning and transferring paper records into the EDR.	1	2	3	4			
Assist in the coordination/communication regarding patient care between medical and dental clinics	1	2	3	4			
Maintenance of confidentiality.	1	2	3	4			
Facilitation of patient flow.	1	2	3	4			
Maintain cultural sensitivity during the patient visit.	1	2	3	4			
Assist other pod members whenever possible.	1	2	3	4			
Report signs of abuse/neglect to a clinic manager.	1	2	3	4			

## Clinica Family Health Services MANAGER OF PATIENT ELIGIBILITY COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

***The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.***

***The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.***

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<div>1. COMMUNICATION &amp; PRODUCTIVITY</div> <div>Competency: Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required tasks.</div> <div>Key: 1 = No knowledge/Experience 2 = Knowledge/No experience3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div>							
Create and maintain a positive, recognition-based, and fun work environment for staff that results in teamwork within the Site Financial Screening departments and productive collaboration with other departments within the organization	1	2	3	4			
Coach, train, schedule, evaluate, hire and terminate staff.	1	2	3	4			
Monitor department performance in relation to established goals, take corrective action when needed, and implement improvements.	1	2	3	4			
Perform monthly audits of established Financial Screening personnel and audits on all applications for new hires during initial period.	1	2	3	4			
Oversee the operations of the Financial Screening teams.	1	2	3	4			
Oversee Financial Screening process in order to maximize the number of patients financially screened: <ul style="list-style-type: none"><li>Optimize schedules and penetration by site</li><li>Monitor Z-Pay and Pending reports.</li></ul>	1	2	3	4			
Design, development and dissemination of internal operational reports to key internal stakeholders, to include the Director of Patient Eligibility and Director of Financial Planning & Analysis	1	2	3	4			

## Clinica Family Health Services MEDICAL ASSISTANT TEAM MANAGER (MATM) COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. LAB SKILLS</b> <b>Competency:</b> Demonstrates consistency and accuracy in all lab related duties							
					<b>Key:</b> 1 = No knowledge/Experience      3 = Knowledge/Done with assistance 2 = Knowledge/No experience      4 = Knowledge/Done independently		
Assures CLIA and proficiency of labs.							
Assures documentation and quality controls are performed on the lab glucometer.							
Assures documentation and quality controls are performed on hematocrit machine using three parallel tests per month.							
Completes corrective action log on any failed quality control including failed proficiency test.							
Reports corrective action logs on any failed quality control including failed proficiency tests to the Nursing Services Manager.							
Assures disinfecting of exam rooms and lab is completed daily.							
Demonstrates proper routine cleaning and storage of medical equipment.							
Demonstrates understanding and role in maintaining Joint Commission and OSHA standards							
<b>2. MANAGEMENT DUTIES</b> <b>Competency:</b> Demonstrates strong leadership skills in line with Clinica's hospitality values, adheres to deadlines, and performs duties consistently and accurately.							
					<b>Key:</b> 1 = No knowledge/Experience      3 = Knowledge/Done with assistance 2 = Knowledge/No experience      4 = Knowledge/Done independently		
Completes competency assessments on all new employees at end of three-month initial period							
Completes performance appraisals yearly. Conducts all MA reviews timely.							
Attends committees and meetings							



## Clinica Family Health Services MEDICAL ASSISTANT/HEALTH TECH II COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. DAILY DUTIES</b> <b>Competency:</b> Consistently perform daily tasks in order to create an environment of safety, accuracy, cleanliness, and collaboration.							
				<b>Key:</b> 1 = No knowledge/Experience      3 = Knowledge/Done with assistance 2 = Knowledge/No experience      4 = Knowledge/Done independently			
ROOM SET UP:	1	2	3	4			
-Rooms are well stocked	1	2	3	4			
-Rooms are kept clean of debris throughout shift	1	2	3	4			
-Rooms are wiped down at the end of every day	1	2	3	4			
OPENING SHIFT:	1	2	3	4			
-Does quality control for glucometer	1	2	3	4			
-Completes autoclave process	1	2	3	4			
- Cidex Control	1	2	3	4			
CLOSING SHIFT:	1	2	3	4			
-Discards Urine	1	2	3	4			
-Wipes down lab	1	2	3	4			
-Take samples out for Quest pick up and labcorp	1	2	3	4			
-Closing checklist and/or check vaccine refrigerator to ensure it is locked	1	2	3	4			
Wash instruments	1	2	3	4			
<b>2. VITAL SIGNS</b> <b>Competency:</b> Perform and record all vital sign checks with accuracy.							
				<b>Key:</b> 1 = No knowledge/Experience      3 = Knowledge/Done with assistance 2 = Knowledge/No experience      4 = Knowledge/Done independently			
TEMPERATURE:	1	2	3	4			
-Proper operation of equipment	1	2	3	4			

## Clinica Family Health MEDICAL ASSISTANT/HEALTH TECH II COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

<div style="display: flex; justify-content: space-around; font-weight: normal;"> <span>MA -</span> <span style="background-color: #ADD8E6; padding: 2px;">MA Level 1</span> <span style="background-color: #FFDAB9; padding: 2px;">MA Level 2</span> </div> <div style="font-weight: bold; margin-top: 5px;">CRITICAL BEHAVIORS</div>	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. DAILY DUTIES</b> <b>Competency:</b> Consistently perform daily tasks in order to create an environment of safety, accuracy, cleanliness, and collaboration.					<b>Key:</b> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div>1 = No knowledge/Experience 2 = Knowledge/No experience</div> <div>3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div> </div>		
ROOM SET UP:							
-Rooms are well stocked							
-Rooms are kept clean of debris throughout shift							
-Rooms are wiped down at the end of every day							
OPENING SHIFT:							
-Does quality control for glucometer							
-Completes autoclave process - Cidex Control							
CLOSING SHIFT:							
-Discards Urine							
-Wipes down lab							
-Take samples out for Quest pick up and labcorp							
-Closing checklist and/or check vaccine refrigerator to ensure it is locked							
Wash instruments							
<b>2. VITAL SIGNS</b> <b>Competency:</b> Perform and record all vital sign checks with accuracy.					<b>Key:</b> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div>1 = No knowledge/Experience 2 = Knowledge/No experience</div> <div>3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div> </div>		
TEMPERATURE:							
-Proper operation of equipment							

## Clinica Family Health Services MEDICAL RECORDS COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. CUSTOMER SERVICE AND TEAMWORK</b> <b>Competency:</b> Demonstrates effective communication and collaborative teamwork with an emphasis on hospitality values. <div style="float: right; text-align: right;"> <b>Key:</b>    1 = No knowledge/Experience    3 = Knowledge/Done with assistance                         2 = Knowledge/No experience        4 = Knowledge/Done independently           </div>							
Identifies areas of improvement and communicates issues to supervisor.	1	2	3	4			
Assists in the development of new and revised procedures/PDSAs.	1	2	3	4			
Assists in training and orientation of new staff.	1	2	3	4			
Stays up to date on all required trainings.	1	2	3	4			
Assists Referral Case Manager as needed.	1	2	3	4			
Demonstrates responsive hospitality based customer service.	1	2	3	4			
<b>2. TECHNICAL &amp; ADMINISTRATIVE DUTIES</b> <b>Competency:</b> Demonstrates effective and efficient use of technical tools. <div style="float: right; text-align: right;"> <b>Key:</b>    1 = No knowledge/Experience    3 = Knowledge/Done with assistance                         2 = Knowledge/No experience        4 = Knowledge/Done independently           </div>							
Proficient with MS Outlook and Word.	1	2	3	4			
Check voicemail and answer incoming calls for medical records.	1	2	3	4			
Process incoming correspondence, faxes, and mail.	1	2	3	4			
Basic knowledge of front desk duties.	1	2	3	4			
Fire and tornado evacuation plan, electrical, and water shut off.	1	2	3	4			
Scanning knowledge and skills.	1	2	3	4			
Checks Pharmacy line.	1	2	3	4			
Maintains up-to-date knowledge of Meditech, CORHIO, TCH, HealthOne and maintains current usernames.	1	2	3	4			

## Clinica Family Health Services NURSE PRACTITIONER/PHYSICIAN ASSISTANT COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

ESSENTIAL DUTIES	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
Serves as a leader on the Pod contributing to the smooth, efficient, operation of the Pod, the Site and the Organization	1	2	3	4			
Provides patient care as per Health Care Plans and within his/her Scope of Practice	1	2	3	4			
Provides high-quality, comprehensive care to all patient populations, both in acute and chronic contexts	1	2	3	4			
Expands and maintains rapport with the medical community in the service area	1	2	3	4			
Appropriately communicates with health & human services agencies, local governments, and community organizations as needed.	1	2	3	4			
Provides responsive off-hours medical services	1	2	3	4			
Supports and teaches team members at the site	1	2	3	4			
Demonstrates knowledge of the principles of growth and development over the life span, and stays current with changes in this area	1	2	3	4			
Provides Human Resources staff the needed documentation, paperwork, and signatures to complete credentialing and privileging	1	2	3	4			
Is respectful and responsive to staff and patients	1	2	3	4			
Handles ongoing daily clinical work in a timely and thorough manner	1	2	3	4			
Exhibits positive leadership skills on and off the pod	1	2	3	4			
Collaborates well with teammates, both on a clinical level as well as on a managerial and administrative level	1	2	3	4			
Handles ongoing daily clinical work in a timely and thorough manner as outlined in the Provider manual	1	2	3	4			
Effective use of the EMR, registries and templates	1	2	3	4			
Supports and promotes MCC utilization with the Clinician team	1	2	3	4			
Maintains a safe work environment	1	2	3	4			

## Clinica Family Health Services PERFORMANCE REVIEW NURSE TEAM MANAGER COMPETENCIES

Employee: \_\_\_\_\_ Supervisor: \_\_\_\_\_  
Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Sections 1-4 are to be conducted at the 90 day mark for new employees and the entire evaluation every year thereafter. Waived testing is performed annually, This NTM competency should be used in conjunction with the Clinical Nurse Competency so as to provide clinical skills assessment.*

*The competency assessment will be conducted by the employee's manager(s). The Manager(s) will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager(s) must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. MANAGEMENT</b> <b>Competency:</b> Demonstrates strong leadership skills in line with Clinica's hospitality values, adheres to deadlines, and performs duties consistently and accurately. <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <span><b>Key:</b></span> <div style="display: flex; gap: 20px;"> <div> <b>1</b> = No knowledge/Experience  <b>2</b> = Knowledge/No experience               </div> <div> <b>3</b> = Knowledge/Done with assistance  <b>4</b> = Knowledge/Done independently               </div> </div> </div>							
<b>Operations Oversight</b>							
Collaborates with the Clinic Operations Director to manage advanced access schedule.	1	2	3	4			
Signs off on staff timesheets timely and accurately.	1	2	3	4			
Adheres to organizational and departmental policies and procedures	1	2	3	4			
Complies with all requirements related to risk management, safety, security, fire, and infection control	1	2	3	4			
Participates in morning Dailies meetings	1	2	3	4			
<b>Clinical Oversight</b>							
Demonstrates the ability to manage patient flow with in the clinic.	1	2	3	4			
Demonstrates sound professional judgment with triage and nurse visits.	1	2	3	4			
Demonstrates sound professional and clinical judgment consistent with clinical background.	1	2	3	4			
Assist in completing Vaccine Event Reporting System (VAERS) form.	1	2	3	4			
Completes incident report for any clinical incidents at the time incidents are reported. Provides support to MATMs when completing incident reports.	1	2	3	4			
<b>Combined Operations/Clinical Oversight</b>							
Collaborates with the Clinic Operations Director, Assistant Nursing Director, Operations staff, other Nurse Team Managers to assure smooth operation of site	1	2	3	4			

## Clinica Family Health PERFORMANCE REVIEW NURSING SERVICES MANAGER COMPETENCIES

Employee: \_\_\_\_\_ Supervisor: \_\_\_\_\_  
 Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Sections 1-4 are to be conducted at the 90 day mark for new employees and the entire evaluation every year thereafter. Waived testing is performed annually, This NSM competency should be used in conjunction with the Clinical Nurse Competency so as to provide clinical skills assessment.*

*The competency assessment will be conducted by the employee's manager(s). The Manager(s) will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager(s) must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. Nurse Leadership</b> <b>Competency:</b> Demonstrates strong leadership skills in line with Clinica’s hospitality values, adheres to deadlines, and performs duties consistently and accurately. <b>Key:</b> 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently							
Adheres to organizational and departmental policies and procedures	1	2	3	4			
Complies with all requirements related to risk management, safety, security, fire, and infection control	1	2	3	4			
Demonstrates sound professional and clinical judgment consistent with clinical background.	1	2	3	4			
Completes incident report for any clinical incidents at the time incidents are reported. Provides support to NTMs & MATMs when completing incident reports.	1	2	3	4			
Oversees and participates in the orientation, education, and training of new and established staff.	1	2	3	4			
Is flexible and adaptable to changes and works with the various teams to assure challenges that occur with changes are identified and addressed.	1	2	3	4			
Demonstrates ability to be prepared for all meetings/ training as scheduled	1	2	3	4			
Participates in quality improvement activities. Assists in the development of new and revised procedures and PDSAs	1	2	3	4			
Oversees uniform delivery of nursing health care across all Clinica sites.	1	2	3	4			
Attends leadership meetings as needed.	1	2	3	4			
Maintains a synergistic and collaborative relationship with the Clinic Operations Directors and ANDs to provide seamless support to the pods.	1	2	3	4			
Supports nurses to effectively manage in-clinic patient visits in addition to other clinic responsibilities.	1	2	3	4			
Proficient with the use of My Clinica Connection.	1	2	3	4			

## Clinica Family Health Services OFFICE TECHNICIAN I COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. CUSTOMER SERVICE</b> <b>Competency:</b> Provides consistent, professional, and hospitality driven customer service to both internal and external customers. <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience              2 = Knowledge/No experience              3 = Knowledge/Done with assistance              4 = Knowledge/Done independently           </div>							
Monitors patient waiting area for cleanliness.	1	2	3	4			
Answer family line within 3 rings and transfers appropriately.	1	2	3	4			
Assists clinical team as necessary.	1	2	3	4			
Greets and processes patient information upon arrival, in a professional manner & provides customer service.	1	2	3	4			
Monitor visitors sign in & sign out.	1	2	3	4			
Attends to the customer's needs or finds someone who would be better able to assist.	1	2	3	4			
Keeps the patient informed about waits/delays.	1	2	3	4			
Confirms appointments for the following day and cancels appointments in the system when appropriate on a daily basis.	1	2	3	4			
Managing patient opt outs from e-confirmation	1	2	3	4			
<b>2. CLERICAL/ADMINISTRATIVE DUTIES</b> <b>Competency:</b> Provides support by helping with routine tasks. <div style="float: right; text-align: right;"> <b>Key:</b> 1 = No knowledge/Experience              2 = Knowledge/No experience              3 = Knowledge/Done with assistance              4 = Knowledge/Done independently           </div>							
Schedules appointments in a timely manner & according to protocol.	1	2	3	4			
Verifies PCP, demographic information, UDS, HIPAA, Consent to Treat and pay codes at check-in and when on telephone.	1	2	3	4			
Copies documents when necessary.	1	2	3	4			
Takes accurate messages.	1	2	3	4			
Maintains knowledge of provider & Staff schedules.	1	2	3	4			

## Clinica Family Health Services OFFICE TECHNICIAN LEAD COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. CUSTOMER SERVICE</b> <b>Competency:</b> Provides consistent, professional, and hospitality driven customer service to both internal and external customers. <span style="float: right;"> <b>Key:</b>    1 = No knowledge/Experience                        2 = Knowledge/No experience           </span>							
Monitors patient waiting area for cleanliness	1	2	3	4			
Answer family line within 3 rings and transfers appropriately	1	2	3	4			
Assists clinical team as necessary	1	2	3	4			
Greets and processes patient information upon arrival, in a professional manner & provides customer service	1	2	3	4			
Monitor visitors sign in & sign out	1	2	3	4			
Attends to the customer's needs or finds someone who would be better able to assist	1	2	3	4			
Keeps the patient informed about waits/delays	1	2	3	4			
Confirms appointments for the following day and cancels appointments in the system when appropriate on a daily basis.	1	2	3	4			
<b>2. CLERICAL/ADMINISTRATIVE DUTIES</b> <b>Competency:</b> Provides support by helping with routine tasks. <span style="float: right;"> <b>Key:</b>    1 = No knowledge/Experience                        2 = Knowledge/No experience           </span>							
Schedules appointments in a timely manner & according to protocol	1	2	3	4			
Verifies PCP, demographic information, UDS, HIPAA, Consent to Treat and pay codes at check-in and when on telephone	1	2	3	4			
Copies documents when necessary	1	2	3	4			
Takes accurate messages	1	2	3	4			
Maintains knowledge of provider & Staff schedules	1	2	3	4			
Follows confidentiality procedures when receiving and faxing patient information. Follows HIPAA guidelines.	1	2	3	4			



## Clinica Family Health Services PHARMACY TECHNICIAN COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.							
					<b>Key:</b>	<b>1</b> = No knowledge/Experience <b>2</b> = Knowledge/No experience	<b>3</b> = Knowledge/Done with assistance <b>4</b> = Knowledge/Done independently
Fills provider orders for medications accurately.	1	2	3	4			
Demonstrates ability to maintain the Medication Assistance Program in a timely and accurate manner.	1	2	3	4			
Assists in ordering, receiving, unpacking and storing pharmaceuticals and supplies in appropriate locations.	1	2	3	4			
Rotates stock to ensure use before expiration date. Identifies and replaces outdated and unusable drugs	1	2	3	4			
Answers the telephone, identifying self and department.	1	2	3	4			
Maintains logs, records and other required documentation accurately. Files in appropriate locations.	1	2	3	4			
Keeps the pharmacy area neat, clean and well-organized. Keeps pharmacy equipment clean.	1	2	3	4			
Participates in quality improvement activities of the department.	1	2	3	4			
Implements Cash/Encounter procedure accurately.	1	2	3	4			
Adapts positively to frequent interruptions and changes to workload or schedule. Organizes and prioritizes work assignments	1	2	3	4			
Provides courteous, cooperative and timely service to patients, visitors and staff. Demonstrates good verbal and written communication.	1	2	3	4			
Works cooperatively with clinic and pharmacy staff. Voices concerns and suggestions to appropriate persons in a positive manner.	1	2	3	4			
Demonstrates sound professional judgment consistent with clinical/academic background.	1	2	3	4			
Generates reports and labels accurately.	1	2	3	4			

## Clinica Family Health Services REFERRAL CASE MANAGER COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<b>1. COMMUNICATION &amp; PRODUCTIVITY</b> <b>Competency:</b> Demonstrates the ability to manage all incoming referrals with professionalism.							
					<b>Key:</b>	1 = No knowledge/Experience 2 = Knowledge/No experience	3 = Knowledge/Done with assistance 4 = Knowledge/Done independently
Demonstrates the ability to mange all incoming referrals per the Clinica referral procedure protocol.	1	2	3	4			
Demonstrates the ability to manage the Open Referral Report.	1	2	3	4			
Demonstrates a timely and correct completion of referral paperwork.	1	2	3	4			
Demonstrates competent utilization of community resources and referrals.	1	2	3	4			
Demonstrate and appropriate utilization of basic advocacy and communications skills.	1	2	3	4			
Demonstrates constructive collaboration between clinic teams.	1	2	3	4			
Demonstrates an appropriate utilization of supervision and case consultation.	1	2	3	4			
Employee will demonstrate an ability to work well with and communicate constructively with other Clinica staff.	1	2	3	4			
Demonstrates working knowledge of CCSOP Program.	1	2	3	4			
Attends and participates in all required meetings.	1	2	3	4			
Identifies and provides feedback to manager for RCM program improvements.	1	2	3	4			
Demonstrates the ability to work with measurements and Total Quality Management Team principles to better their work.	1	2	3	4			
Demonstrates timely attendance for work and scheduled meetings.	1	2	3	4			
Maintains up to date on all EHR changes and upgrades.	1	2	3	4			
Assists in the training and orientation of new staff.	1	2	3	4			
Assists in the development of new and revised procedures and PDSAs.	1	2	3	4			

## Clinica Family Health Services REGISTERED DIETICIAN COMPETENCIES

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Location: \_\_\_\_\_ Hire Date: \_\_\_\_\_

*This competency assessment is to be used as a tool to verify employee skill level in each of the areas outlined. It should be used as a training/orientation tool, as well as, a vehicle for evaluation in areas of success and needed improvement. Competency assessments are to be conducted at the 90 day mark for new employees and every odd year thereafter.*

*The competency assessment will be conducted by the employee's manager. The Manager will indicate whether the expectation in each of the skill areas has been met or not met. Comments should also be noted when appropriate. If performance is unable to be validated the manager must make note of that in the comments area.*

*The employee is responsible for performing the self-evaluation. The employee should circle the number that BEST corresponds to his/her experience.*

CRITICAL BEHAVIORS	Self-Evaluation				Supervisor Evaluation (Initial)		Date/Comments
	1	2	3	4	Met	Not Met*/NA	
<div>1. COMMUNICATION &amp; PRODUCTIVITY</div> <div>Competency: Communicates effectively with other members of the health care team, patients, and family members. Maintains professional hospitality driven standards while completing all required duties.</div> <div>Key: 1 = No knowledge/Experience 2 = Knowledge/No experience 3 = Knowledge/Done with assistance 4 = Knowledge/Done independently</div>							
Able to educate patients and families on blood sugar control, glucometer use and maintenance, insulin and medication use and storage, diabetes self-care and self-management goal setting.	1	2	3	4			
Able to provide diabetes education for patients with diabetes during pregnancy or with gestational diabetes.	1	2	3	4			
Able to provide nutrition counseling to patients during pregnancy, or patients with a nutrition-related condition.	1	2	3	4			
Able to provide expertise and nutrition counseling to clients in the Prenatal Plus program.	1	2	3	4			
Works with BH staff to counsel patients on nutrition or weight gain issues and provide expertise and advise to staff as needed.	1	2	3	4			
Able to plan, develop and implement nutrition or diabetes-related training for nurses, and the Prenatal Plus staff (social workers and case managers).	1	2	3	4			
Able to plan, develop and implement diabetes or other nutrition education activities or classes for adult patients and families.	1	2	3	4			
Able to develop and review diabetes and nutrition education materials for patients, families and staff.	1	2	3	4			
Able to assist in the development of the overall health education plan.	1	2	3	4			
Able to administer health education activities in related grants.	1	2	3	4			
Is a liaison to community resources and agencies in relation to diabetes or health education resources and activities.	1	2	3	4			
Participates in the implementation and on going training of an effective Quality Improvement Program.	1	2	3	4			
Demonstrates knowledge of the principals of growth and development over the life span.	1	2	3	4			

