

Performance Review

Medical Receptionist

This template is designed to be used together with the Medical Receptionist Position Description template, which outlines the responsibilities and requirements of the role.

Information for the reviewer

Before the performance review, ask the employee to complete the different sections in this document and return it to you at least two days before the review.

During the review, use this document to record:

- how the employee thinks they have performed against each of their key responsibilities
- feedback or concerns from the employee
- the employee's career goals for the future
- the goals that you and the employee agree on for the next performance cycle and the support that you will provide to help the employee achieve their goals (e.g. training).

Information for the employee

Before your performance review, complete the different sections in this document and return it to the reviewer at least two days before your review.

During your review, you will be able to:

- reflect on your work during the performance cycle
- receive appreciation and recognition for your achievements
- raise problems and resolve issues arising from your work
- discuss your hopes and expectations for the next performance cycle
- set your career goals for the future
- discuss training and development opportunities to improve your performance and further your career.

Practice name:

Date:

Medical Receptionist performance review	
Employee name:	
Position responsible to:	
Positions with direct responsibility to this position:	
Date of this review:	
Reviewer name:	

Measuring performance against your position description

Medical Receptionist position description	Employee rating (out of 10)	Reviewer rating (out of 10)	Comments
Key responsibilities – duties			
The Medical Receptionist will:			
<ul style="list-style-type: none"> answer the telephone in a courteous and professional manner 			
<ul style="list-style-type: none"> receive and convey messages in writing, verbally and electronically 			
<ul style="list-style-type: none"> liaise with patients and their families in a compassionate manner 			
<ul style="list-style-type: none"> liaise with GPs, other health professionals and their staff 			
<ul style="list-style-type: none"> make appointments 			
<ul style="list-style-type: none"> scan and file documents 			
<ul style="list-style-type: none"> prepare documents for mail out 			
<ul style="list-style-type: none"> open, stamp and distribute incoming mail 			
<ul style="list-style-type: none"> type documents as required, with a high level of accuracy 			
<ul style="list-style-type: none"> monitor stationery and/or clinical supplies and place orders as required or directed, maintaining a working supply at all times 			
<ul style="list-style-type: none"> book and organise staff and/or doctors' meetings as directed 			
<ul style="list-style-type: none"> participate in ongoing professional development 			
<ul style="list-style-type: none"> contribute equitably to maintaining the cleanliness of the practice 			
<ul style="list-style-type: none"> maintain practice dress standards 			
<ul style="list-style-type: none"> handle cash, EFTPOS and other payments and adhere to practice billing policy 			

<ul style="list-style-type: none"> ensure the practice and rooms are clean, tidy and accessible 			
<ul style="list-style-type: none"> perform other administrative duties as directed by the Practice Manager or Principal Doctor/s. 			
Key responsibilities – safety, quality and culture			
<p>The Medical Receptionist will:</p> <ul style="list-style-type: none"> participate in the practice risk management and quality improvement processes 			
<ul style="list-style-type: none"> record incidents and near misses in line with practice policy 			
<ul style="list-style-type: none"> exercise duty of care including meeting practice standards and accountability 			
<ul style="list-style-type: none"> maintain patient and practice confidentiality at all times 			
<ul style="list-style-type: none"> ensure the practice building and work spaces are conducive to a safe and practical work environment 			
<ul style="list-style-type: none"> work to clinical governance processes and standards 			
<ul style="list-style-type: none"> actively contribute to the development of a culture consistent with the values of the practice. 			

Documentation review	Yes	No
Evidence of training in CPR undertaken within the past three years or as otherwise required by the RACGP general practice standards		
Evidence of a current criminal record screening		
Evidence of a current Working with Children Check		

Overall performance

Your achievements:

What achievements have given you the greatest satisfaction? How could they be built on?

Your challenges:

What challenges have you experienced? How could they be overcome?

Your obstacles:

Were there any obstacles that prevented you from achieving your goals? How could they be eliminated?

Your job description:

Is your job description still current?

Your opportunities for improvement:

To improve your overall performance, what could be done by management, yourself or others?

Your goals:

What are your goals for the next performance cycle?

Your career:
How do you see your career developing?

How would you rate your overall performance?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Not satisfactory Average Very satisfactory

Professional learning and development plan

Goal/s	Action required	Date for completion

Additional training needs	Reason	Comments

Skills to be developed (select as preferred)	Attendance	Future attendance
Clinical software training		
Customer service training and dealing with difficult patients		
CPR course		
MBS item numbers		
Triage and emergencies		
Recall and reminder systems		
Pen Clinical Audit Tool		
Other		

Employee's comments

Reviewer's comments

Performance review discussed and accepted

Employee name:	
Signature:	Date:
Reviewer name:	
Signature:	Date:

Whilst all care has been taken in preparing this document, this information is a guide only and subject to change without notice.