

## Know-How

# The doings are in the details

## Tracking productivity through detailed job descriptions

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**T**ake a new look at the importance of job descriptions. They can help you:

- Track office efficiency;
- Set productivity criteria and parameters of accountability;
- Provide a mechanism to reward and retain productive employees;
- Measure employees’ growth;
- Examine office workflow; and
- Anticipate education and cross-training needs.

With outdated job descriptions or worse — no job descriptions — you’ll find it hard to determine if employees complete tasks and who holds accountability. Initially, to accomplish the task of writing accurate job descriptions, you might ask employees to document their responsibilities. You will probably get a short list lacking detail. It is impractical to expect employees to document everything they do and equally impossible for you to write everything in a job description.

However, a quick and easy way to obtain the basic information is to have each employee complete a checklist that takes less than 15 minutes. The results give you an understanding of his/her responsibilities — as the employee perceives them (see page 37). The project establishes ownership and documents accountability.

Next, have a supervisor review the results and assign or delete tasks as needed. Add statements such as, “Keep abreast of Medicare and insurance rules and regulations”; “Follow compliance, HIPAA (Health Insurance Portability and Accountability Act) regulations and office procedures”; “Handle other tasks as assigned.”

Then, using the checklist information, prepare a detailed job description for each staff member and document the results of

the checklist on each employee’s spreadsheet. Update job descriptions and the spreadsheet annually, tracking professional growth, productivity and the distribution of tasks.

Depending on the size of your organization, you may wish to consider a master job list that records the entire workforce’s assignments and accountability for tasks and provides a tracking mechanism for workflow. The master checklist shows you at a glance tasks that are assigned and tasks that must be assigned. In addition, you can determine if you have backup for key tasks or if staff needs cross-training.

### Employee evaluations and recognition of performance

Data from detailed job descriptions, individual spreadsheets and evaluation forms provide the information you need to allocate raises based on performance and accomplishments.

During an annual performance evaluation meeting, discuss the assigned responsibilities:

- Do assigned tasks correspond to the job title?
- Does the employee accomplish tasks associated with the job title?
- More or less than peers within the job category?
- Has there been a pattern of growth or stagnation?
- Is career development meeting the employee’s expectation?
- Does the employee’s interpretation of responsibilities synchronize with the organization’s expectation?

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## Sample job description checklist

Yes	No	Medical assistant
		Clean, sterilize and wrap medical instruments
		Assist in the examination room
		Confirm referrals and insurance coverage for office visits and surgeries
		Escort patients to exam room
		Handle phone calls regarding hospitalization
		Handle phone calls regarding surgeries
		Handle phone calls regarding test results
		Handle patient requests for prescription refills
		Participate in an in-house committee
		Handle disposal of medical waste
		Adhere to compliance and HIPAA* guidelines
		Instruct patients regarding where to go for tests, if not performed in the office
		Operate general office equipment such as fax, printer, copier and adding machine
		Order business supplies and verify deliveries
		Order medical supplies and verify deliveries
		Maintain treatment rooms, labs, etc.

		Meet with drug reps, maintain a sample inventory and track expiration dates of drugs
		Note patients' complaints and take weight, height and other vital signs, and medical history
		Oversee cross-training as needed
		Oversee the operation/maintenance of medical equipment
		Prepare medications and give injections
		Record and maintain lab, X-ray and other test data in patients' charts
		Respond to general correspondence without supervision
		Return patient phone calls as needed
		Schedule hospitalizations
		Schedule lab and other tests
		Schedule surgeries
		Screen clinical calls and handle those that do not require a physician's input
		Write up lab requisitions
		Other: Describe:

\*Health Insurance Portability and Accountability Act

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### Job descriptions assist promotion, retention of employees

Salaries are most likely your largest expense and employees your most important asset. Retaining good employees is often the result of people believing they are paid fairly. Employees who increase responsibilities and productivity within the same job-title parameters expect recognition at salary reviews. Evaluating compensation based on responsibility and productivity starts with a complete understanding of what an employee actually does. You don't want to discover, during an exit interview, that an employee resigned to take a secretarial position with a pay difference of less than a dollar an hour. Avoid such a situation with a yearly review of job descriptions.

Tracking outside training and education plays a key role in employee retention. Obtaining additional education usually indicates a desire to increase or change responsibilities. Without an accurate tracking

mechanism, you may find yourself placing an ad for a position without realizing an employee has been training for advancement or seeking a career change appropriate for the advertised position. If that happens, the employee may feel overlooked and will very likely consider the organization lacking in advancement opportunities.

Employees often measure themselves against others within the same job category. As a manager, you should, too. When you have employees with the same job title, such as secretary or medical assistant, you need a clear understanding of each individual's responsibilities and accomplishments to fairly establish raises and reward those who clearly accomplish more than others in a similar job. An employer that recognizes workers who increase responsibilities and improve skills is likely to keep those employees. Poor and mediocre employees will probably look for an organization that rewards seniority. ❌