

Team Member Evaluation Form

Name: _____ Position: _____ Anniversary Date: _____
 Date of Evaluation: _____ Evaluator: Self ☐ DR ☐ _____ Signature: _____

Personality Evaluation

E G F P Note how an "F" or "P" may be changed to a "G" or "E"

Attitude: Attitude towards other team members is 6 5 2 ... 0 _____
 Attitude towards Supervisor (or person in charge) is 6 5 2 ... 0 _____
 Attitude towards Doctor is 6 5 2 ... 0 _____
 Degree of genuine concern for patients is 6 5 2 ... 0 _____
 Degree to which responsibility is accepted is 6 5 2 ... 0 _____
 Commitment to the goals of the practice is 6 5 2 ... 0 _____
 Attempts to improve position in practice is 6 5 2 ... 0 _____
 Ability to accept criticism or suggestions is 6 5 2 ... 0 _____
 Ability to pay attention and give positive feedback is 6 5 2 ... 0 _____
 Ability to relate everyday problems to the doctor is 6 5 2 ... 0 _____
 Ability to follow through on directions given is 6 5 2 ... 0 _____
 Ability to keep personal affairs under control is 6 5 2 ... 0 _____
 Ability to use non-patient time effectively is 6 5 2 ... 0 _____
 Awareness of the daily work schedule is 6 5 2 ... 0 _____

Appearance: Uniform or own clothing appearance is 6 5 2 ... 0 _____
 Hair and make-up is 6 5 2 ... 0 _____
 Oral and physical hygiene is 6 5 2 ... 0 _____

Attendance: On time for work (times/year late: 1-2 = G, 3-4 = F, >4 = P) is 6 5 2 ... 0 _____
 NOT out for sickness (times/year sick: 1 = G, 2 = F, >2 = P) is 6 5 2 ... 0 _____
 Ability not to abuse break time is 6 5 2 ... 0 _____

Add up Circled or Entered Numbers = _____ Divided by 20 = _____ (2 decimal places) [= Personality Score]

Position Evaluation

refer to BACK of this form to do Position Evaluation

Results of Evaluation

after Personality Score and Position Score is determined

Personality Score + _____

Position Score + _____

Total of Both Scores = _____ Divide Total of Both Scores by 2: = _____ (2 decimal places) [= Evaluation Score]

Evaluation Score	6.00	5.50 to 5.99	4.50 to 5.49	4.00 to 4.49	3.99 or less
Established Team Member Raise Multiplier	1.05	1.03	1.02	1.01	Replace Team Member
(Present Hourly Salary) \$ _____ X _____ (Raise Multiplier) = \$ _____ (New Hourly Salary Amount)					

Evaluation Score	6.00	5.50 to 5.99	4.50 to 5.49	4.00 to 4.49	3.99 or less
New Team Member (3/9/21 mo) Raise Multiplier	1.50	1.25	1.00	0.75	Replace Team Member
(Proposed Increase) \$ _____ X (Raise Multiplier) _____ = \$ _____ (Actual Increase Amount)					
(Present Hourly Salary) \$ _____ + \$ _____ (Actual Increase Amount) = \$ _____ (New Hourly Salary Amount)					

Comments and follow-up: _____

Team Member Evaluation Form

Position Evaluation

Circle the number for the E, G, F or P score, or insert some number in between.

Circle the "Divisor" (2 or 1) next to the E, F, G or P number score

Team Coordinator

	E	G	F	P	Divisor
Hiring new team members	12	10	4	0	2
Training new team members	12	10	4	0	2
Evaluating team members	6	5	2	0	1
Re-training team members	6	5	2	0	1
Payroll control	6	5	2	0	1
Benefits distribution control	6	5	2	0	1
Vacation control	6	5	2	0	1
Inventory supplies control	6	5	2	0	1
Purchasing control	6	5	2	0	1
Statistics & Reporting control	6	5	2	0	1
Petty cash control	6	5	2	0	1
Petty check control	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Financial Coordinator

Past Due Control	12	10	4	0	2
Accounts receivable control	6	5	2	0	1
Daily deposit control	6	5	2	0	1
Determination of Credit Status	6	5	2	0	1
Insurance Control:					
Filing of assignments accepted	6	5	2	0	1
Periodic statements on time	6	5	2	0	1
Collection of amount owed	6	5	2	0	1
Accounts payable control	6	5	2	0	1
Bookkeeper Quality Control					
Accuracy of work	12	10	4	0	2
Knowledge of all procedures	12	10	4	0	2
Neatness or work	6	5	2	0	1
Speed of work	6	5	2	0	1
Work done on time	6	5	2	0	1
Financial area maintenance	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Treatment Coordinator (TC)

New Patient Exam procedures	12	10	4	0	2
Will-Call-Back follow-up	12	10	4	0	2
Tx Fee determination (calculation)	12	10	4	0	2
Financial Arrangements	12	10	4	0	2
Tx Consultation procedures	12	10	4	0	2
Observation/Recall procedures	6	5	2	0	1
Handling difficult patients	6	5	2	0	1
Phone handling and personality	6	5	2	0	1
Calmness under stress	6	5	2	0	1
Knowledge of orthodontics	6	5	2	0	1
Neatness of work	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Receptionist

Proper use of scheduling system	12	10	4	0	2
Handling difficult patients	12	10	4	0	2
Phone handling/personality	12	10	4	0	2
Greeting patients properly	6	5	2	0	1
Calmness under stress	6	5	2	0	1
Missed Appointment control	6	5	2	0	1
Cancellation control	6	5	2	0	1
Recall control	6	5	2	0	1
Pulling and filing charts	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Secretary

Speed of Typing	6	5	2	0	1
Lack of errors	6	5	2	0	1
Appearance of Letters	6	5	2	0	1
Mail Control	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Left Columns Totals

Clinical Team Evaluation

General Skills (for all clinical) E G F P Divisor

Staying on Schedule	12	10	4	0	2
Following the doctor's directions	12	10	4	0	2
Accuracy of procedures	12	10	4	0	2
Completeness of procedures	6	5	2	0	1
Speed of procedures	6	5	2	0	1
Sterilization techniques	6	5	2	0	1
Work Area inventory restocking	6	5	2	0	1
Work area maintenance	6	5	2	0	1
Patient Handling Skills:					
Gentleness with patients	12	10	4	0	2
Friendliness with patients	6	5	2	0	1
Patient preparation and clean-up	6	5	2	0	1
.....	6	5	2	0	1

Patient Training Skills:

Overall Training Skills	6	5	2	0	1
Hygiene training	6	5	2	0	1
Appliance usage training	6	5	2	0	1
Appliance wearing time training	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Chairside Assisting Responsibilities (DAs only)

Quality of bandings	12	10	4	0	2
Quality of bondings	12	10	4	0	2
Quality of archwire procedures	12	10	4	0	2
Emergency/SOS patient handling	12	10	4	0	2
Completely filling out Tx Chart	6	5	2	0	1
Anticipation of doctor's needs	6	5	2	0	1
Quality of archwire fabrication	6	5	2	0	1
Fixed Appl. adjustment procedures	6	5	2	0	1
Removable Appl. adj. procedures	6	5	2	0	1
Anticipation of doctor's needs	6	5	2	0	1
Initiating charted Tx for the appt.	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Records Tech Responsibilities (circle those that apply)

Quality of X-rays	12	10	4	0	2
Quality of Impressions	12	10	4	0	2
Quality of Photos	12	10	4	0	2
Quality of X-ray Processing	6	5	2	0	1
Photo Mounting & Filing	6	5	2	0	1
Ceph Tracing	6	5	2	0	1
Completely filling out Tx Chart	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Laboratory Responsibilities (circle those that apply)

Quality of removable retainers	12	10	4	0	2
Quality of other removable Appl.	12	10	4	0	2
Quality of fixed retainers	12	10	4	0	2
Quality of other fixed appliances	12	10	4	0	2
Quality of study model fabrication	12	10	4	0	2
Quality of wire bending	6	5	2	0	1
Quality of acrylic fabrication	6	5	2	0	1
Appliance wearing time training	6	5	2	0	1
.....	6	5	2	0	1
.....	6	5	2	0	1

Right Columns Totals

Place Left Column Totals Here

Right + Left Column Totals A B

A ÷ B = (2 decimal places) [= Position Score]

Position Evaluation
Notes: (a, b, c, etc.)

Position Score Comments:

Be Careful When Adding!!!