

Progress Evaluation - BOCA

Rate each area on a scale of 1-5:

1 = Needs significant improvement

2 = Below expectations

3 = Meets expectations

4 = Exceeds expectations

5 = Outstanding performance

Evaluation Area	Description	Score (1-5)
1. Account Management	Ability to oversee patient accounts and handle special care cases effectively	
2. Financial Planning	Accuracy in preparing plans and communicating financial details to patients	
3. Billing Management	Efficiency in handling payments, resolving discrepancies, and managing balances	
4. Communication	Effectiveness in conveying plan details and expectations to patients	
5. Time Management	Completion of plans and files before deadlines and efficient handling of daily tasks	
6. Problem Solving	Ability to research and resolve patient ledger discrepancies	
7. Follow-Up Protocol	Consistency in following up with pending patients and declined payments	
8. Attention to Detail	Accuracy in monitoring patient ledgers and managing payment issues	
9. Teamwork	Collaboration with Operations Coordinator and Office Manager in meetings and issue resolution	

10. Process Adherence	Compliance with established protocols for cancellations and follow-ups	
Total Score:	/50	

Comments and Development Plan:

Evaluator: _____ Date: _____

Employee: _____ Date: _____

Score Interpretation

Total Score	Performance Level	Description
45-50	Outstanding	Exceptional performance that consistently exceeds all expectations. Role model for others.
40-44	Exceeds Expectations	Strong performance that frequently surpasses requirements in key areas.
30-39	Meets Expectations	Solid performance that fulfills all essential job requirements.
20-29	Needs Improvement	Performance that meets some requirements but falls short in several areas. Development plan required.
10-19	Unsatisfactory	Performance consistently below expectations. Immediate corrective action needed.
Below 10	Critical Concern	Significant performance issues requiring urgent intervention and comprehensive improvement plan.