

# Progress Evaluation - COCA

Evaluation Area	Description	Score (1-5)
1. Patient Check-out	Effectively manages check-out process for PPV, new, and ROF patients	
2. Patient Information	Accurately enters new patient information and maintains paperwork requirements	
3. Financial Management	Manages cash drawer, reconciles payments, and handles billing documentation	
4. Appointment Scheduling	Effectively schedules and monitors patient appointments and MUDs	
5. Patient Communication	Keeps patients informed about appointments, frequency changes, and scheduling updates	
6. Schedule Management	Proactively identifies and corrects schedule conflicts	
7. Special Appointments	Coordinates consults, BRF attendance, and special appointment scheduling	
8. Schedule Out %	Maintains high percentage of care plans scheduled before Office Policies appointment	
9. PPV Charge Accuracy	Ensures accurate charging for Pay-Per-Visit patients	
10. Ledger Management	Maintains accurate and up-to-date patient ledgers	
<b>Total Score:</b>	/50	

**Comments and Development Plan:**

Evaluator: \_\_\_\_\_ Date: \_\_\_\_\_

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