Steinberg
Consulting Services, Inc.

Managing Your Staff Overview

Employee Management Resource

All employees need guidelines and standards in order to excel at their positions. There are several features to this set of guidelines as outlined below. Have all of the personnel items specific to each employee in a locked cabinet. Keep the general use documents in a public place (such as a document on a shared office computer, or a printed loose-leaf bound book in the staff area).

Documents:

1. Clarity Blueprint: This document outlines the basic mission, values, and operations of the company.

2. Initial hiring documents: This set should include a standard application for employment, a submitted resume, license or certificate (if applicable), malpractice insurance (if applicable), background check notification, employment agreement, offer letter and signed confidentiality agreement.

3. Employee Procedural manual: This document outlines how to do the basic functions of the job.

4. Employee Job description: this document outlines the basic areas of responsibility for each employee, and can include specific checklists to insure completion of cycles.

5. Employee policy handbook: this document outlines the rules of being an employee of your company. Companies that are small, and where the primary doctor is on site at all times services are rendered can do fine with a brief document. Larger companies, multiple work sites and service provision in the absence of the primary doctor require more comprehensive policy handbooks.

6. Employee review form.

7. Master list of employee identification information, hire/termination date, emergency contact info, pay details and last review date. This document is not for public use, but should be kept by either the primary doctor or the office manager in a secure location.

Procedures

1. Creating Clarity is a separate project, which will give context and meaning to all other procedures to follow. If this is not completed, you will find contradictions, gaps, cross-purposes, competing commitments, etc.

2. Create blank employee files for your professional and admin staff. Also create a knowledge document with links for registration and information gathering so you do not have to retrieve this every time you hire.

3. Employee procedural manuals are template in the Steinberg consulting website. These documents can be modified to fit your exact clinical setup, but they have to be internally consistent and current. The signature page showing receipt, understanding and agreement is signed by the employee and placed in the employee file. The document itself should be easily accessible in your office.

4. The primary doctor and/or the office manager should construct employee job descriptions in overview. An experienced employee in that current role can best list details (e.g. opening/closing procedures). If this is not available, then the primary doctor or the office manager will have to do it.

5. The employee policy handbook is a critical document to insure fairness, compliance with employee law and to prevent factionalism or other conflicts that arise from lack of precision. This allows the employee to know exactly what to expect from the employer and to know what is expected of him or her. Unspoken rules lead to problems in the office eventually.

6. The review form for administrative employees uses a 10-point scale to rate general characteristics and performances. The doctor or manager then must identify up to 5 key endpoint responsibilities assigned to that employee. Three is the minimum. Examples would be:
   a. Closure of the day's books and preparation of the bank deposit within 15 minutes of closing time
   b. 100% collection of co-insurances and cash patient balances at the time of service
   c. Maintenance of the total AR at under 100% of average services.

7. Commentary section is for items not covered under the above formats, project work, job expansion, etc. Be as concrete and specific as you can in the second section of the exercise.

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