

Therapist Key Result Areas

Mission Statement

To serve our community, moving them to excel in health, wellness, and life.

Vision Statement

To build an exceptional company through people, stewarding leaders who move their teams, patients, and communities beyond their perceived potential.

Values

1. Love
 - a. Serve and steward
 - b. Surprise and delight
 - c. Wash other people's feet
2. Growth
 - a. Personal excellence
 - i. Mind - intellectual and emotional
 - 1 Knowledge, understanding, self-worth
 - ii. Body - physical and financial
 - 1 Health
 - iii. Soul - spiritual and social
 - 1 Relationships characterized by love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, and self-control
3. Grace
 - a. We were first loved
 - b. We should not cast the first stone

Communication: *The team member communicates effectively in a way that is professional, respectful, articulate, and timely.*

- Introduces self as “Doctor...” at each initial evaluation and when answering the phone
- Always responds to “thank you” with “my pleasure”
- Indicates warm-ups and expected POC on the daily schedule
- Follows the check-out process, walking the patient to the front and communicating the POC to the patient and the front office team member
- Follows the discharge process by issuing a comprehensive and progressed HEP handout, making appropriate referrals to endorsed local providers (ELPs), providing a discharge folder, and regularly requesting a signature, picture, and online reviews
- Responds to emails or messages within two working days or by the deadline indicated
- Has a signature block on all emails including the company logo, name, credentials, title, address, email, phone number, fax number, and hyperlinks to our website and Google and Facebook review forms
- Verbally communicates with referral sources, at minimum one time a month
- Prior to physician follow-up visits, provides a clinical impression status update and/or “Thank You” card for the patient to bring to the provider
- Written progress provided to referral sources prior to follow-ups, when requested by patient, and in compliance with regulations
- Makes referrals to ELPs when appropriate, communicating relevant patient details to the provider when granted permission by the patient
- Follows out-of-office protocol including setting up email alerts for planned days off, notifying the opening front office team member of absence greater than an hour prior to first patient, and communicating options for re-scheduling patients
- Prior to being out of the clinic, communicates patients’ POC with front office team members and therapists involved; introduces patient to treating therapist
- Speaks with love and respect to all patients and team members, promoting unity and our values of love, growth, and grace
- Does not gossip by sharing problems or gripes down or laterally with team members who have no control over the issues; rather, communicates these problems with leadership
- Maintains professionalism by conversing with team members about personal matters in an appropriate and quiet manner when patients are within ear shot
- Collaborates with the front office staff to maintain supply list, updating the spreadsheet one to two weeks prior to running out of supplies

Clinical Expertise and Development: *The team member manifests the vision of the practice by enthusiastically participating in the mission of the practice.*

- Strives to grow in all 6 Pillars of Health daily
- Is a member of APTA/OPTA or AOTA/OTAO
- Completes and submits all continuing education units in compliance with OPTA or OTLB regulations
- Completes in-service following any continuing education class
- Is actively pursuing manual therapy certification (PTs)
- Is actively pursuing APTA or AOTA specialty or taking courses to build an identity and brand self to community and referral sources
- Completes APTA or AOTA Credentialed Clinical Instructor program
- Participates as Clinical Instructor when asked by the Director of Clinical Education
- Actively participates in clinic monthly collaboration sessions, including sharing a Systematic Review or RCT, discussing a patient case, instructing on or learning new skills
- Collaborates with colleagues regarding specific cases weekly, seeking mentorship and/or training
- Leads training of new therapists
- Contributes to orientation of new team members
- Contributes to mentoring and training of other therapists
- Continuously develops and coaches therapists
- Contributes to performance appraisal of team members
- Brings Pre-PT or Pre-OT front office team members in on a session for observation or assistance at least monthly
- Attends career fairs to recruit students and therapists
- Participates in at least 10 community service hours per year, whether the hours are clinic-sponsored or not; documents hours in appropriate spreadsheet at least quarterly
- Assists in planning, coordinating, and executing marketing initiatives related to patient experience, referral relationships, community involvement and groups, business to business, social media, online and printed advertising, and website and online presence and reviews; attends necessary meetings; leads one section of clinic's marketing
- Plans, coordinates, and executes marketing initiatives related to patient experience, referral relationships, community involvement and groups, business to business, social media, online and printed advertising, and website and online presence and reviews; attends necessary meetings
- Assists in completing a referring provider drop-off and documents it in appropriate calendar weekly
- Completes a referring provider drop-off and documents it in appropriate calendar weekly

- Assists in the coordination of at least one group volunteer effort per quarter, creating visibility and/or contributing to the development of new referral sources
- Coordinates, or manages the coordination of, at least one group volunteer effort per quarter, creating visibility and/or contributing to the development of new referral sources
- Assists in the coordination of at least one business to business partnership in-house or shared event (per geographical region) per quarter, creating visibility and/or contributing to the development of new referral sources
- Coordinates, or manages the coordination of, at least one business-to-business partnership in-house or shared event (per geographical region) per quarter, creating visibility and/or contributing to the development of new referral sources
- Reads *Entreleadership*, by Dave Ramsey
- Listens to *Entreleadership* podcast, or other leadership development podcast, weekly
- Actively participates in monthly Clinic Operator Leadership Development meetings, including completing the quarterly recommended reading material
- Actively participates in annual *Entreleadership* Summit event to leadership development
- Actively participates in quarterly off-site meetings to assist company and other leaders with vision-casting and goal-mapping

Flexibility: *The team member demonstrates a willingness and readiness to respond to the evolving needs of the practice.*

- Seeks to participate in the development and growth of the practice
- Helps to develop, accepts, and executes new policies and procedures
- Regularly adjusts schedule to accommodate the needs of patients, team members, referring entities, or other local community/business entities
- Regularly accommodates another therapist's patient when available and other options to fill an opening have been exhausted, a therapist is absent, or a patient arrives without an appointment
- Regularly accommodates late patients
- Leads weekly therapist staff meetings
- Sends weekly email to clinic team members to provide important dates and other updates and/or announcements
- In Operator's absence, fulfills routine meeting requirements
- Participates in meeting with CEO weekly, or less often as needed, to provide status updates and prioritize action items
- Participates in meeting with office manager weekly to provide status updates and prioritize action items
- Leads weekly 1-on-1 meeting with a therapist in order to give him/her an opportunity to be heard privately

- Participates in quarterly location-specific board meetings with the CEO and CFO
- Treats a therapist and significant other to dinner quarterly in an effort to get to know the team member better
- Completes office manager 90-day and annual performance evaluations
- Completes therapist 90-day and annual performance evaluations

Productivity: *The team member effectively contributes to the financial health of the practice.*

- Reviews active list monthly to ensure all patients are scheduled for appropriate POC, on call list appropriately, or on hold list appropriately
- Completes weekly POC compliance report to front office specifications
- Actively assists front office team members in filling appointments whenever there is an opening
- Calls patient after second cancellation or no-show
- Appointment efficiency (openings + unfilled cancellations/total appointment slots) above clinic standards
- Unit efficiency (possible timed codes billed/actual timed codes billed) above clinic standards
- Charge efficiency (dollar amount billed/filled appointment) above clinic standards
- Late cancellations and no-shows better than clinic standards, demonstrating that patients consistently see value in keeping their appointments
- Lost list kept to less than 10 patients at any given time
- Prioritizes filling beginning- and end-of-day openings equally with other openings
- Works closely with office manager to maintain full therapist schedules
- Trains with Operator on P&L Statements, payroll reports, budgets, outcome reporting, and other relevant financial metrics; assists with budgets and outcome reporting
- Completes clinic outcome reports quarterly and presents data to therapists individually
- Completes quarterly budget by the end of the month prior to the beginning of the next quarter
- Makes updates to budget monthly, or more often as needed
- Reviews location-specific P&L Statements, payroll reports, budgets, outcomes, and other relevant financial metrics monthly, or more often as needed
- Assists the CEO and CFO in the development and implementation of new financial metrics
- Collaborates with the CEO and CFO to determine appropriate financial benchmarks

Quality of Work: *The team member achieves patient satisfaction and thoroughly documents in compliance with regulations. The team member completes required tasks with excellence.*

A. Patient Treatment

- Net Promoter Score at or above 8
- Follows up with Net Promoter Scores 7 or below to ask for constructive feedback
- Receives 5-star Google and Facebook reviews regularly, at least one per month each
- Functional improvement reports at or above MCID
- Pain reports at or above MCID
- Avoids over-utilization of services
- Consistently determines effectiveness of interventions by assessing, treating, and reassessing
- Provides HEP handout or updates HEP handout the majority of appointments
- Regularly serves patients by opening doors, taking or giving a jacket, offering water, giving a hand to the car, etc.
- Regularly asks patients about things they have shared regarding their personal lives
- Recalls the names of patients' significant others and/or caregivers
- Regularly compliments patients
- Regularly follows up with patients with "Thank You" cards, phone calls, etc.

B. Documentation

- SOAP note performed at each daily visit
 - Subjective includes reported, measurable, functional progress
 - Objective includes at least one measured impairment
 - Treatment includes interventions performed under appropriate CPT code category with justification for use
 - Assessment supports medical necessity for ongoing treatment
 - Plan includes recommended appointment frequency and specific plan for next visit
- Evaluations performed at each initial visit
 - Subjective includes onset, behavior of symptoms, history of current condition, history related to current condition, diagnostic testing/imaging, relevant medical history, VAS, and functional outcome measure
 - Objective includes thorough examination of relevant body region highlighting impairments
 - Treatment includes interventions performed, documented under appropriate CPT code category with justification for use
 - Assessment includes PT diagnosis, medical necessity for PT services, prognosis, and evaluation complexity with justification

- Plan includes goals, recommended appointment frequency, interventions to be utilized, specific plan for next visit, and signature
- Status reports performed prior to follow-ups, when requested by patient, and in compliance with authorization requirements
 - Subjective includes measurable functional progress, VAS, and functional outcome measure
 - Objective includes thorough re-examination of relevant body region highlighting remaining impairments
 - Treatment includes interventions performed, documented under appropriate CPT code category with justification for use
 - Assessment highlights progress made towards goals and supports medical necessity for ongoing treatment
 - Plan includes updated progress toward goals, updated recommended appointment frequency, specific plan for next visit, and signature
- Discharge summaries performed at the end of care
 - Subjective includes measurable functional progress, VAS, and functional outcome measure
 - Objective includes thorough re-examination of relevant body region
 - Treatment includes interventions performed, documented under appropriate CPT code category with justification for use
 - Assessment highlights progress made towards goals and supports plan to discharge patient
 - Plan includes that patient is discharged and includes signature
- Worker's compensation notes include start and end time
- Completes all notes the same day of service, at least by 8am the following business day, and completes all self-discharges within two weeks of making the determination
- Notes are easy to understand
- Abbreviations, all of which are medical abbreviations, are used sparingly
- Initiates HEP on evaluation day
- Selects appropriate ICD10 code(s) in accordance with insurance requirements
- Follows CMS guidelines for payers receiving state or federal funding only
- Follows AMA guidelines for private payers receiving funding from sources other than state or federal
- Ethically maximizes the CPT units and charges billed, documenting the interventions performed to support the superbill
- Completes all superbills the same day of service, at least by 8am the following business day
- Completes billing error report corrections the same day received
- Learns from billing errors, repeating the same mistake no more than one time
- Makes billing errors less often than monthly
- Completes yearly chart audit within one month of assignment

C. Other Tasks

- Gains and maintains student affiliation contracts
- Coordinates high school, college, and graduate student observation hours and internships, including communicating with the school regarding declination or acceptance, assigning the student to a CI, scheduling the student in collaboration with the front office and CI, onboarding, ensuring timely completion of evaluations, and executing necessary disciplinary action
- Creates, maintains, and communicates policies and procedures related to clinical education
- Assists office manager with front office hiring process including job posting, screening, interviewing, collaborating with Operator regarding offer, offer presentation, and onboarding
- Assists Operator with therapist hiring process including job posting, screening, interviewing, collaborating with Operator regarding offer, offer presentation, and onboarding
- Leads therapist hiring process including job posting, screening, interviewing, offer determination, offer presentation, and onboarding
- Collaborates with the office manager to organize birthday celebrations as well as biannual clinic get togethers
- Assists central office to complete all necessary credentialing paperwork for therapists and locations

Work Habits: *The team member is enthusiastically compliant with practice policies and procedures.*

- Integrates values of love, growth, and grace in all interactions
- Follows HIPAA regulations
- Follows Fraud, Waste, and Abuse regulations
- Follows policies and procedures described in the employee handbook
- Completes annual compliance training before due date
- Completes re-licensure every two years before due date
- Ensures compliance with regulatory requirements, including but not limited to monitoring the completion of all clinic policy and procedure/compliance training at hire and annually thereafter, maintaining HIPAA and IT standards, overseeing the completion of routine equipment maintenance, updating labor law posters annually or more often as needed, maintenance of MSDS manuals annually or more often as needed, and attendance of quarterly safety meetings and completion of post-meeting action items
- Maintains good attendance record
- Requests and records PTO in a timely manner
- Manages front office manager's time off requests
- Creates and manages the therapist schedule
- Manages all therapist time off requests, including adjusting therapist coverage as necessary
- Arrives to work 10-15min early in order to start first treatment session on time

- Consistently begins and ends treatment sessions on time
- Attends staff meetings
- Maintains organized desk space
- Returns equipment to proper place after use
- Operates equipment in accordance with manufacturer's guidelines
- Cleans up after self
- Helps front office team members with duties when able
- Answers phones within two rings when front office team member is occupied
- Contributes to clinic culture by participating in the day-to-day back-and-forth and clinic outings
- Seeks immediate resolution of discourse with fellow team member
- Takes direction and responds to feedback
- Maintains a clean and professional appearance