



Directions: Have team member complete self assessment and set personal goals before meeting with supervisor.

Team Member Name: _____

Year: _____ Quarter: 1st 2nd 3rd 4th

Thank you for taking time to complete this performance review. Only by consistently measuring ourselves and setting goals, can we more fully attain our motto:

DOCTORS, PATIENTS, & STAFF
SERVING FOR THE HIGHEST IN
VALUE, CARE, EXCELLENCE, & INTEGRITY

Rating Scale Legend

Rating	Abbrev	Description
Not Applicable	NA	Team member too new to company or competency not applicable to team member.
Needs Improvement	1	Consistently falls short of performance standards. Performance is far below expectations. Significant improvement required.
Below Expectations	2	Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance had declined significantly, or employee has not sustained adequate improvement, as required since last performance review or performance improvement plan.
Meets Expectations	3	Meets all relevant performance standards. Seldom exceeds or falls short of desired results or objectives. Lacks appropriate level of skills or is inexperienced/still learning the scope of the job.
Exceeds Expectations	4	Consistently meets and often exceeds at relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.
Exceptional	5	Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work



Section 1: Review of Performance

Active Teamwork	Team Member	Supervisor
Facilitates open communication between team members.	NA 1 2 3 4 5	NA 1 2 3 4 5
Actively helps other with their tasks and duties.	NA 1 2 3 4 5	NA 1 2 3 4 5
Equally participates in team tasks and duties	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		

People Skills & Patient Communication	Team Member	Supervisor
Takes initiative and time to comfortably talk with patients.	NA 1 2 3 4 5	NA 1 2 3 4 5
Helps patients feel comfortable and at ease.	NA 1 2 3 4 5	NA 1 2 3 4 5
Thoroughly reviews procedures, answers questions, and educates patients.	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		

Efficiency	Team Member	Supervisor
Completes tasks and duties in the right order or priority.	NA 1 2 3 4 5	NA 1 2 3 4 5
Does things right the first time.	NA 1 2 3 4 5	NA 1 2 3 4 5
Recognizes how things fit together in the big picture.	NA 1 2 3 4 5	NA 1 2 3 4 5
Effective use of down time.	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		

Leadership	Team Member	Supervisor
Appropriately takes responsibility and ownership not deferring to others .	NA 1 2 3 4 5	NA 1 2 3 4 5
Encourages and motivates others to reach their potential.	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		

Follow Through	Team Member	Supervisor
Effective use of task lists including: Through use, daily review, keeping it cleaned out, professional language.	NA 1 2 3 4 5	NA 1 2 3 4 5
Through use of all patient checklists.	NA 1 2 3 4 5	NA 1 2 3 4 5
Through use of job position specific checklists.	NA 1 2 3 4 5	NA 1 2 3 4 5
Effectively manages all hand-offs necessary	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		

Assistants Specific	Team Member	Supervisor
Operatories and procedures thoroughly setup	NA 1 2 3 4 5	NA 1 2 3 4 5
Thorough in cleaning, operatories, instruments, and work areas	NA 1 2 3 4 5	NA 1 2 3 4 5
Anticipates and adapts to: different procedures, doctor preference, & dynamic/difficult situations.	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		



Section 2: Proficiencies Reviews

Rating	Abbrev	Description
Not Acquainted	NA	Team member not acquainted with proficiency.
Understands	20%	Understands proficiency
Reference Needed	40%	Can perform proficiency with reference of guide/handbook
Limited Reference Needed	60%	Can Performs proficiency with limited reference to guide/handbook
No Reference Needed	80%	Can Perform proficiency without reference to guide/handbook.
Quickly w/o Reference	100%	Can Perform proficiency quickly without reference to guide/handbook.

Setup & Assist Cleaning	NA	20%	40%	60%	80%	100%
Setup & Assist SCRP	NA	20%	40%	60%	80%	100%
Setup & Assist Comprehensive/Limited Exam	NA	20%	40%	60%	80%	100%
Setup & Assist Filling	NA	20%	40%	60%	80%	100%
Standard	NA	20%	40%	60%	80%	100%
Anterior	NA	20%	40%	60%	80%	100%
Pulp cap	NA	20%	40%	60%	80%	100%
Pulpotomy	NA	20%	40%	60%	80%	100%
Setup & Assist Endo	NA	20%	40%	60%	80%	100%
One Visit	NA	20%	40%	60%	80%	100%
Adult Pulpotomy	NA	20%	40%	60%	80%	100%
Setup & Assist Crown	NA	20%	40%	60%	80%	100%
Same Day	NA	20%	40%	60%	80%	100%
2 Visit	NA	20%	40%	60%	80%	100%
Buildup/Post	NA	20%	40%	60%	80%	100%
Bridge	NA	20%	40%	60%	80%	100%
Cement Posterior	NA	20%	40%	60%	80%	100%
Cement Anterior	NA	20%	40%	60%	80%	100%
Re-Cement	NA	20%	40%	60%	80%	100%
Setup & Assist Denture	NA	20%	40%	60%	80%	100%
Impression	NA	20%	40%	60%	80%	100%
Wax Rim/Wax Tryin	NA	20%	40%	60%	80%	100%
Deliver	NA	20%	40%	60%	80%	100%
Adjust	NA	20%	40%	60%	80%	100%
Soft reline	NA	20%	40%	60%	80%	100%
Setup & Assist Oral Surgery	NA	20%	40%	60%	80%	100%
Standard	NA	20%	40%	60%	80%	100%
Surgical	NA	20%	40%	60%	80%	100%
Bone Graft	NA	20%	40%	60%	80%	100%
Alveoloplasty	NA	20%	40%	60%	80%	100%
Setup & Assist Ortho	NA	20%	40%	60%	80%	100%
Records Visit	NA	20%	40%	60%	80%	100%
Bonding	NA	20%	40%	60%	80%	100%
Periodic	NA	20%	40%	60%	80%	100%
Final	NA	20%	40%	60%	80%	100%
Retainer Check	NA	20%	40%	60%	80%	100%
Setup & Assist Laser	NA	20%	40%	60%	80%	100%
Setup & Assist Implants	NA	20%	40%	60%	80%	100%
Surgical Stent	NA	20%	40%	60%	80%	100%
Placement	NA	20%	40%	60%	80%	100%
Post-Op X-ray & Impression	NA	20%	40%	60%	80%	100%



Cement	NA	20%	40%	60%	80%	100%
Add Locators to Denture	NA	20%	40%	60%	80%	100%
Change Locator Linings	NA	20%	40%	60%	80%	100%
Setup & Assist In Office Bleaching	NA	20%	40%	60%	80%	100%
Setup & Assist Opalustre	NA	20%	40%	60%	80%	100%
Setup & Assist Space Maintainer	NA	20%	40%	60%	80%	100%
Setup & Assist NTI	NA	20%	40%	60%	80%	100%
Setup & Assist Sealants	NA	20%	40%	60%	80%	100%
Foundational Assisting Principles	NA	20%	40%	60%	80%	100%
PreSchool Fieldtrip	NA	20%	40%	60%	80%	100%
Triage Patients	NA	20%	40%	60%	80%	100%
Cerec Certified	NA	20%	40%	60%	80%	100%
Intraoral Photos	NA	20%	40%	60%	80%	100%
Ortho Pictures	NA	20%	40%	60%	80%	100%
Study Models	NA	20%	40%	60%	80%	100%
Alginate Impressions	NA	20%	40%	60%	80%	100%
Pouring Up Models	NA	20%	40%	60%	80%	100%
Nitrous	NA	20%	40%	60%	80%	100%
Pano/Conebeam	NA	20%	40%	60%	80%	100%
Bitewing & PAs	NA	20%	40%	60%	80%	100%
Prophy	NA	20%	40%	60%	80%	100%
Blood Pressure	NA	20%	40%	60%	80%	100%
Anesthesia	NA	20%	40%	60%	80%	100%
Cleaning & Maintaining the Autoclave	NA	20%	40%	60%	80%	100%
Unpacking and Tagging	NA	20%	40%	60%	80%	100%
Cleaning an Operatory	NA	20%	40%	60%	80%	100%
Making Bleach Trays	NA	20%	40%	60%	80%	100%
Making Clear Retainer	NA	20%	40%	60%	80%	100%
Making Sports Guard	NA	20%	40%	60%	80%	100%
Filling out Lab Slips	NA	20%	40%	60%	80%	100%
Turn Radio, Office, Equipment	NA	20%	40%	60%	80%	100%
Collect & Enter New Patient Information	NA	20%	40%	60%	80%	100%
Taking Payment	NA	20%	40%	60%	80%	100%
Enter Clinical Notes	NA	20%	40%	60%	80%	100%
Set up Text Messaging	NA	20%	40%	60%	80%	100%
Complete Dental Charting	NA	20%	40%	60%	80%	100%
Listen/Patient Education	NA	20%	40%	60%	80%	100%
Treatment Plan	NA	20%	40%	60%	80%	100%
Efficient Scheduling	NA	20%	40%	60%	80%	100%
Lab Case Setup and Processing	NA	20%	40%	60%	80%	100%
Sell and Record Products	NA	20%	40%	60%	80%	100%
Setup Membership Plan with Quote and TP	NA	20%	40%	60%	80%	100%
Multiple tx Plan Options	NA	20%	40%	60%	80%	100%
Set up Payment Plan & Save Credit Card on File	NA	20%	40%	60%	80%	100%
Check Patient In	NA	20%	40%	60%	80%	100%
Check Patient Out	NA	20%	40%	60%	80%	100%
Answer the Phone	NA	20%	40%	60%	80%	100%
Comments:						



Section 3: Performance Plan for & List of Goals

List your own goals: