



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

Team Member Name: \_\_\_\_\_

Year: \_\_\_\_\_ Quarter: 1<sup>st</sup> 2<sup>nd</sup> 3<sup>rd</sup> 4<sup>th</sup>

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:

<p>DOCTORS, PATIENTS, &amp; STAFF SERVING FOR THE HIGHEST IN VALUE, CARE, EXCELLENCE, &amp; INTEGRITY</p>
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Rating Scale Legend

Rating	Abbrev	Description
<b>Not Applicable</b>	NA	Team member too new to company or competency not applicable to team member.
<b>Needs Improvement</b>	1	Consistently falls short of performance standards. Performance is far below expectations. Significant improvement required.
<b>Below Expectations</b>	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.
<b>Meets Expectations</b>	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.
<b>Exceeds Expectations</b>	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.
<b>Exceptional</b>	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

<b>Active Teamwork</b>	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:		

<b>People Skills &amp; Patient Communication</b>	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:		

<b>Efficiency</b>	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:		

<b>Leadership</b>	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:		

<b>Follow Through</b>	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:		

<b>Hygiene Specific</b>	Team Member	Supervisor
Comfortable and painless cleaning.	NA 1 2 3 4 5	NA 1 2 3 4 5
Thorough cleaning.	NA 1 2 3 4 5	NA 1 2 3 4 5
Thorough patient education and product offering.	NA 1 2 3 4 5	NA 1 2 3 4 5
Comments:		



## Section 2: Proficiencies Reviews

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

Cascade Periodontal Disease Flow Chart	NA	20%	40%	60%	80%	100%
Lasers: Physics and Safety	NA	20%	40%	60%	80%	100%
Lasers: Setup Protocol	NA	20%	40%	60%	80%	100%
Laser: Certification & Safety	NA	20%	40%	60%	80%	100%
Laser: Herpetic Lesions/ Cold Sore	NA	20%	40%	60%	80%	100%
Laser: Aphthous Ulcer/ Canker Sore	NA	20%	40%	60%	80%	100%
Laser: Desensitizing Teeth	NA	20%	40%	60%	80%	100%
Sharpen Instruments	NA	20%	40%	60%	80%	100%
Blood Pressure	NA	20%	40%	60%	80%	100%
Anesthesia	NA	20%	40%	60%	80%	100%
Triage Patients	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%
Intraoral & Extraoral Exam	NA	20%	40%	60%	80%	100%
Preschool Field Trip	NA	20%	40%	60%	80%	100%
Reactive Recall Patients	NA	20%	40%	60%	80%	100%
Clean 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 On 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%
Set up Text Messaging	NA	20%	40%	60%	80%	100%
Complete Dental Charting	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:*