

## Physical Therapist Key Result Areas

### Mission Statement

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

### Vision Statement

To be the premier rehabilitation, fitness, health, and wellness organization in the Willamette Valley.

### 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 week
- Prior to physician follow-up visits, provides a clinical impression status update 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; fax tracking spreadsheet updated accordingly
- 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
- Completes and submits all continuing education units in compliance with OPTA regulations
- Completes in-service following any continuing education class
- Is actively pursuing manual therapy certification
- Is actively pursuing APTA specialty or taking courses to build an identity and brand self to community and referral sources
- Completes APTA Credentialed Clinical Instructor program
- Participates as Clinical Instructor when asked by the Director of Clinical Education
- Actively participates in weekly rounds, including sharing a Systematic Review or RCT
- Actively participates in monthly mentorship
- 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 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 one community service project and/or marketing event per quarter, or when asked, creating visibility and/or contributing to the development of new referral sources
- Participates in the development of one educational content piece per month (blog, video, social post, etc.)
- Assists in planning and coordinating 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.
- Completes a referring provider "Thank You" drop-off weekly.
- Plans and coordinates marketing initiatives, leading one section of marketing without direction
- Reads *Entreleadership*, by Dave Ramsey
- Listens to *Entreleadership* podcast weekly
- Runs new email marketing campaigns quarterly, or more regularly

**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
- Participates in meeting with CEO weekly 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 therapist staff meetings
- Leads weekly 1-on-1 meeting with a therapist in order to give him/her an opportunity to be heard privately
- Participates in monthly location-specific board meetings with the CEO and CFO
- Treats a therapist and significant other to dinner monthly in an effort to get to know the team member more intimately
- 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
- 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
- Cancellations kept to a minimum, demonstrating that patients consistently see value in keeping their appointments
- Prioritizes filling beginning- and end-of-day openings equally with other openings
- Works closely with office manager to maintain full therapist schedules
- Reviews metric reports regularly
- Reviews relevant metrics with therapists as necessary

- Participates in setting, monitoring, and keeping to the monthly clinic budget and related metrics, particularly cost/patient appointment
- Reviews location-specific P&L Statements and other relevant financial metrics
- 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
- KEET Health functional improvement reports at or above MCID
- KEET Health 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 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
- Provides copy of all HEPs to front office support staff to be uploaded into EMR
- Selects appropriate ICD10 code(s) in accordance with insurance requirements
- Follows CMS guidelines for payers receiving state or federal funding
- Follows AMA guidelines for payers receiving no state or federal funding
- Ethically maximizes the CPT units and charges billed, documenting the interventions performed to support the superbill
- Completes all superbills the same day of service
- 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
- 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
- Assists office manager with front office hiring process including job posting, screening, interviewing, collaborating with clinic director or operator regarding offer, offer presentation, and onboarding
- Assists clinic director or operator with therapist hiring process including job posting, screening, interviewing, collaborating with clinic director 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 back 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 our values of love, growth, and grace and the golden rule in all interactions
- Integrates 6 Pillars of Health into all habits
- Follows HIPAA regulations
- Follows Fraud, Waste, and Abuse regulations
- Follows policies and procedures described in the employee handbook
- Maintains good attendance record
- Requests and records PTO in a timely manner
- 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