

**Clinical Services Technician (CST)**  
**Performance Evaluation Rating Guideline Ambulatory (2019)**

MJR	4 Consistently Exceeds	3 Occasionally Exceeds	2 Meets Expectations	1 Does Not Meet Expectations
Quality and Safety for Patient Care	Consistently identifies, reports, and responds to situations that may lead to a change in a patient condition that requires immediate attention by the provider or RN. Independently identifies and initiates unassigned tasks within scope. Validator for annual competency.	Occasionally identifies and implements changes in care delivery based on patient/family individual needs. Identifies changes in clinical status and reports to the provider or RN. Occasionally identifies and initiates unassigned tasks without direction.	Identifies patient safety concerns, completes on line safety reports and makes needed corrections immediately. Communicates changes in patient status. Completes delegated tasks with assigned timeframe. Documents care provided (written or electronic) in an accurate thorough, legible manner.	Fails to complete delegated tasks. Has not exhibited teamwork in assisting co-workers. Has not demonstrated behaviors to resolve conflict with others. Does not incorporate changes into their workflow. Resistant to change.
Service Tie to Magnet questions and CG-CAHPs results for clinic	Promotes/Encourages positive and professional behavior from team members. Leader in the clinic; always goes above and beyond. Engages in service initiatives for the clinic/UKHC. Anticipates issues before they occur. Always handles patient/family concerns or complaints immediately and seeks the appropriate resources for intervention (two or more examples).	Role models positive and professional behavior. Consistent positive feedback from patients/families/colleagues. Prevents others from discussing frustrations in public. Occasionally anticipates the special needs and/or circumstances of patients and families before they occur. 3-5 STARS, patient comments, positive feedback, etc. Nominated for nursing specialty / service award (clinical excellence award nomination).	Demonstrates positive and professional behavior, prompt and flexible service. No patient/family/peer complaints. Attitude is supportive of a positive clinic. Uses all elements of AIDET in each interaction with patient/family. Welcomes patient to the clinic and explains their role. Follows dress code. Acknowledges the patient concern and feelings.	Fails to demonstrate respect and professionalism. Uses negative tone and facial expression. Substantiated patient/family/peer complaint and/or manager observation to behavior. Does not use AIDET in all interactions with patient and family. Task oriented only. Does not follow through on concerns/complaints. Has not shown any personal engagement in employee/patient satisfaction initiatives 2 or more substantiated complaints from patients, families, peers, etc.

<p>Concern of Nurse/Assistant for problem (92.9)</p> <p>Friendliness of Nurse/Assistant (94.8)</p> <p>Office Staff Quality Domain (use enterprise metrics)</p>	<p>Multiple positive feedback (PG comments, notes, STARS, etc) Recipient of nursing specialty / service award (clinical excellence award winner)</p> <p>*Add 3 points to overall rating if meet any of the above.</p> <p>3 of 3</p>	<p>*Add 3 points to overall rating if meet any of the above.</p> <p>2 of 3</p>	<p>*Add 3 points to overall rating if meet any of the above.</p> <p>1 of 3</p>	<p>No additional points</p> <p>0 of 3</p>
<p>Professional Development and Competency</p>	<p>Advances on TAP ladder &amp;/or maintains status on ladder</p>	<p>Actively participates in a unit/clinic/enterprise council, committee or task force</p>	<p>Completes required competencies by deadline and/or according to policy. <b>(WBTs)</b></p> <p>Attends all unit/clinic specific meetings; mandatory educational sessions; &amp; committee requirements per policy.</p> <p>Maintains mandatory certifications required for specific position: <b>(BLS; Employee Health Screenings).</b></p>	<p>Competencies not completed on time and/or according policy.</p> <p>Does not attend unit specific meetings; educational/informational sessions; or committee requirements per policy.</p> <p>Does not maintain appropriate certifications required by position.</p>
<p>Efficiency</p>	<p>Actively engaged in new initiatives and teaching co-workers when applicable (super-user or validator). Serve as a clinic resource assisting co-workers in completing their work timely. Self-directed and takes ownership of issues in the clinic. Consistently adjusts and is flexible with schedule to accommodate the clinic.</p>	<p>Role model. Uses extra time to assist co-workers to get caught up and leave on time. Manages resources appropriately. Goes above and beyond to make sure the clinic has supplies to work efficiently. Occasionally works an extra shift or adjusts schedule to accommodate the clinic.</p>	<p>Improves own work flow based on standard work. Follows all policies and guidelines. Work is completed within scheduled hours. Reports to work on time and as scheduled. Uses resources appropriately <b>(does not misuse resources such as cell phones, personal calls, and internet, etc.)</b></p>	<p>Resistant to change. Consistently works past scheduled time to leave. Does not use resources appropriately <b>(inappropriate cell phone use, inappropriate internet use, multiple personal calls, etc.)</b>. Probation &amp;/or suspension in the corrective action process. <b>(for absences, tardies, no pays, and no clocks according to attendance policy) More than 1 written warning, probation, &amp;/or suspension.</b></p>

Adm Support	Consistently goes above and beyond to get patients efficiently through the clinic and scheduled for testing/procedures. When asked to work in another area or complete another task always does so in a manner that exhibits respect and teamwork. Demonstrates support, respect, and professional behaviors for colleagues and is accountable for all interactions. 5 or more positive comments from others regarding support, teamwork or respect.	Goes above and beyond to get tests and procedures scheduled. Works closely with provider and/or patient to accommodate schedules Occasionally exceeds expectations in preparing medical records for patient visit. 3 positive comments from a co-worker or from another area. Works in other areas without complaining. 3 positive comments regarding interactions with others (including patients, visitors).	Accurate with scheduling of tests/procedures. Efficient in check in/out process. Prepares medical record for patient visit. Paperwork complete, accurate, and timely. Collaborates with other members of the healthcare team as needed. No complaints from co-workers. Works in other areas without complaining. Respectful interactions with patient or co-worker.	Fails to complete registrations, check in/check out in a timely manner. Multiple mistakes when scheduling tests or procedures. Medical records not prepped for patient visit. Delay in paperwork (FMLA, etc). 2 or more substantiated complaints of failure to follow through with appropriate health care team members. 1 or more substantiated complaints/observations of unprofessional behavior/attitude to a patient or co-worker.
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