

Notice of Performance Expectations: Getting Serious With Your Staff About HIPAA, Professionalism and Customer Service



Do your employees “get it”?

If not, add this simple form to your tool box. These three concepts – customer service, professionalism, and HIPAA – are the basis for 80% of your everyday performance issues.

Tweak the language to fit your workplace, then print it. Ask existing employees to sign it and **hand it back to you personally** so you have the opportunity to ask them if they have any questions, and so you can discuss any behaviors they currently exhibit where coaching is needed. This constitutes verbal counseling and you have documented it in writing. Depending on your discipline policy, if the employee continues to perform poorly in the same area, follow up with written counseling, a performance improvement plan, or specific consequences.

Have this form in your new employee packet and review it with new employees as part of the orientation process.

Notice of Performance Expectations

Demonstrate outstanding customer service

- Smile with your eyes.
- Follow the 5-10 Rule. When you are 10 feet away from a patient, make eye contact. When you are 5 feet away from a patient, greet them. Apply the 5-10 rule to everyone.
- Thank patients, sincerely.
- Ask patients how you can help them.

Model professionalism

- Keep your voice at an appropriate level at all times.
- Do not curse or use impolite words. If you are unsure what impolite words are, ask me.
- Do not discuss patients personally or clinically in a derogatory way.
- Do not eat meals at your workstation or other work areas of the office.
- Dress appropriately. No cleavage, no sports clothing.
- Speak to co-workers every day. Regardless of what you think about anyone, speak to them pleasantly when you encounter them.

Be HIPAA-compliant

- Keep all patient-specific information out of view of the patient and other non-practice people. This includes charts and other patient information potentially visible at check-in, check-out, the lab, exam room doors and at

the nurses station.

- Do not access any patient information in paper or electronic form which is not required to do your job.
- When clinically discussing the patient, do not use the full name of the patient on the phone or in any area where there is potential to be overheard. Do not use the speaker function on the phone to listen to messages or speak with patients.
- Do not take any medical records, patient information or patient-related information out of the office.

I understand the performance standards described above and agree to adhere to them as part of my job description.

Signature of Employee /Date

This form is not intended to take the place of a full orientation to confidentiality and compliance, but is intended to emphasize the priorities in your medical practice. Tweak it to make it address the 20% of behaviors that cause 80% of your employee issues.

Other posts:

[Ten Golden Rules for Your Office Staff](#)

[21 Common Sense Rules for Medical Offices](#)

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