


## EMPLOYEE LOG

This Log is a snapshot of every interaction with this employee. Often when we do an evaluation, what most impacts your judgment is what's happened with that employee over the past couple of weeks, it's hard to have the broader perspective of the past year. The Log is intended to help you have that broader perspective, reminders of many things that have occurred with this employee.

If you create a document, it automatically updates the log. This sample below shows an employee with 5 documents that have been created. In a moment we will discuss how to create all of these documents; print them out if you choose; even have employees sign for documentation and then attach electronically.

The EMPLOYEE LOG is also like having a piece of paper where you can note different activities with an employee. Let's say someone sends you an email commending this employee for her great work or you notice the fact that he was late two days in a row – this is a critical part of an employee file, but where to put it? Well, this EMPLOYEE FEEDBACK LOG gives you a central repository for that type of information. If it was an email, you could simply copy and paste into the document. Or you could save the email as a document and attach. Let's keep it simple, William is 2 hours late and you want to note that. Click on the pencil you see in the upper right hand corner of the Employee Log piece.

### View Employee Log


Date	Last 5 Log Entries (first 85 characters)	
<a href="#">11/29/2006</a>	Training Document Action created by Pam Jones on 11/29/2006	
<a href="#">11/29/2006</a>	Coaching Document created by Pam Jones on 11/29/2006	
<a href="#">11/29/2006</a>	Applause Document created by Pam Jones on 11/29/2006	
<a href="#">11/29/2006</a>	Disciplinary Action created by Pam Jones on 11/29/2006	
<a href="#">11/29/2006</a>	Annual Review created by Pam Jones on 11/29/2006	

This brings up this document. Now you can put any comments in or if there was an email, you could paste that in.

<b>Employee Name:</b> William Shatner	<b>Job Title:</b> Reimbursement Specialist
<b>Department:</b> Billing	<b>Manager:</b> Pam Jones
<b>Employee ID:</b> 676869	<b>Date:</b> 11/29/2006
<b>Log Entry:</b> <i>Enter comments in the space provided.</i>	
William was 2 hours late today - 2nd day this week	



Hit the NEXT button and this appears on the top of the EMPLOYEE LOG.

### View Employee Log










Date	Last 5 Log Entries (first 85 characters)	
<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week	
<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006	
<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006	
<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 9/29/2006	
<a href="#">09/15/2006</a>	Disciplinary Action created by Pam Jones on 9/15/2006	

Again, the EMPLOYEE FEEDBACK LOG is invaluable when it is time for an evaluation. Too often we evaluate employees on what we remember from the last month, not on their performance for the year or quarter. This log gives you the total picture with info that is always accessible. To view more than the last 5 entries, click on VIEW EMPLOYEE LOG. You could print it out, have it front of you as you consider coaching needs or commendations for your employee. It's a great tool and one many of you asked for.

### View Employee Log

Date	Last 5 Log Entries (first 85 characters)	
<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week	
<a href="#">11/29/2006</a>	 SIGNED JOB DESCRIPTION ATTACHED	
<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006	
<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006	
<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 9/29/2006	

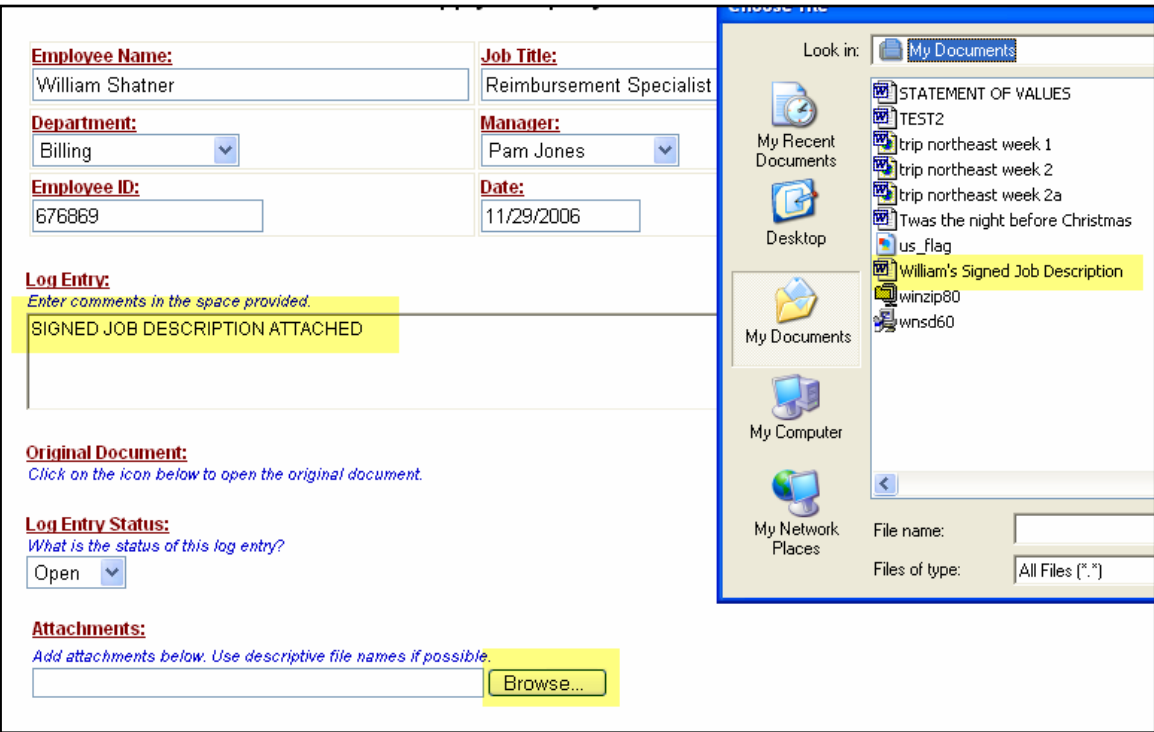
### View/Print Full Employee Log

Del?	Date	Log Entry (first 80 characters)
	<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week
	<a href="#">11/29/2006</a>	 SIGNED JOB DESCRIPTION ATTACHED
	<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006
	<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006
	<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 9/29/2006
	<a href="#">09/15/2006</a>	Disciplinary Action created by Pam Jones on 9/15/2006
	<a href="#">09/15/2006</a>	Introductory Evaluation created by Pam Jones on 9/15/2006
	<a href="#">06/26/2006</a>	Training Document Action created by Pam Jones on 6/26/2006

**Attaching Documents in the Employee Log**

You can even attach scanned documents as a part of the EMPLOYEE LOG. For example, accrediting bodies want you to have a job description on file and signed by the employee who has that job description. If you are a company who does document imaging, here is a simple way to make that part of EmTrak. Click on the pencil icon to bring up the empty document we described earlier.

In the field available, simply type SIGNED JOB DESCRIPTION ATTACHED. Click on the BROWSE button (at the bottom of the page) to bring up file folders on your computer. Find the file where you scanned and saved the signed job description, double-click on that document and it will be attached.



Now when you go back into the EMPLOYEE LOG, you will note that there is a paper clip now next to the SIGNED JOB DESCRIPTION ATTACHMENT line. Click on the Date link next to it and the Employee Log entry comes up.

**View Employee Log**

Date	Last 5 Log Entries (first 85 characters)	
<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week	
<a href="#">11/29/2006</a>	SIGNED JOB DESCRIPTION ATTACHED	
<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006	
<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006	
<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 9/29/2006	

Look at the bottom and you will see where the file is attached. You could open that document simply by clicking on the link for the document.

**Log Entry:**  
*Enter comments in the space provided.*  
SIGNED JOB DESCRIPTION ATTACHED

**Original Document:**  
*Click on the icon below to open the original document.*

**Log Entry Status:**  
*What is the status of this log entry?*  
Open

**Attachments:**  
*Add attachments below. Use descriptive file names if possible.*

<b>File Name:</b>	<a href="#">William's Signed Job Description.doc</a>	<b>24 (Kbytes)</b>	
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**Opening Documents in the Employee Log**

You can open any document created for an employee through the EMPLOYEE LOG. Click on the link to VIEW FULL EMPLOYEE LOG. You will see a list like this one. Let's say we want to review a Coaching Document we created on 10/29/2006. Click on the Date link next to the document.

**View/Print Full Employee Log**

Del?	Date	Log Entry (first 80 characters)
	<a href="#">11/29/2006</a>	William was 2 hours late today - 2nd day this week
	<a href="#">11/29/2006</a>	SIGNED JOB DESCRIPTION ATTACHED
	<a href="#">11/01/2006</a>	Annual Review created by Pam Jones on 11/01/2006
	<a href="#">10/29/2006</a>	Coaching Document created by Pam Jones on 10/29/2006
	<a href="#">09/29/2006</a>	Applause Document created by Pam Jones on 9/29/2006
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	<a href="#">06/26/2006</a>	Training Document Action created by Pam Jones on 6/26/2006

This EMPLOYEE LOG ENTRY will come up. Note highlighted in yellow the document icon. Click on that icon and it opens the original document, ready to edit.

Edit Employee Log Entry		Return to Menu
<b>Employee Name:</b> William Shather	<b>Job Title:</b> Reimbursement Specialist	
<b>Department:</b> Billing	<b>Manager:</b> Pam Jones	
<b>Employee ID:</b> 676869	<b>Date:</b> 10/29/2006	
<b>Log Entry:</b> <i>Enter comments in the space provided.</i> Coaching Document created by Pam Jones on 10/29/2006		
<b>Original Document:</b> <i>Click on the icon below to open the original document.</i>		
<b>Log Entry Status:</b> <i>What is the status of this log entry?</i> Open		
<b>Attachments:</b> <i>Add attachments below. Use descriptive file names if possible.</i>		

Edit Coaching Document		Return to Menu
<b>Employee Name</b> William Shather	<b>Job Title</b> Reimbursement Specialist	
<b>Department</b> Billing	<b>Manager</b> Pam Jones	
<b>Employee ID</b> 676869	<b>Date</b> 11/29/2006	
<b>Job Expectations Documentation</b>		
<ul style="list-style-type: none"> <li><input type="radio"/> Ensure completion or receipt of all documents needed for billing.</li> <li><input type="radio"/> Request assignment of benefits, prescriptions, CMNs, letters of medical necessity and other required information. Follow up on the collection of required documentation.</li> <li><input type="radio"/> Request and follow-up CMN documentation from physicians in a timely manner, including: Completion of CMN portions as appropriate, Mail, email or hand deliver to physician for completion and signature, Log CMN receipt daily, updating computer CMN files as needed, Review, correct and resubmit CMNs as needed.</li> <li><input type="radio"/> Receive, log and track prescriptions and orders from physicians/referral sources.</li> <li><input type="radio"/> Develop procedures to ensure orders are filled or referred.</li> </ul>		
<b>Goals &amp; Action Plan</b>		
<p><i>What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager?</i></p> <p>** Target: Effective collection of all required documents</p> <p>Take the MED U course REM 102 – Reimbursement and Documentation and after completion, review the proper procedures with management. Get the processes down on paper in an easily understandable format, define needed improvements with manager, then follow through before next review.</p>		