

COACHING DOCUMENT

Coaching is the heart of EmTrak. You will find this phrase and this link in every type of evaluation in EmTrak 3.1. Notice the term COACHING. Effective performance management is based on coaching. Simply put, it's a fact that positive reinforcement is more effective than negative – encouragement more effective than punishment. EmTrak 3.1 utilizes a coaching approach throughout.

Perhaps you noticed the quote from H. Gordon Selfridge in the [INTRODUCTION](#) for this guide:
"The boss drives people; the leader COACHES them." The boss depends on authority; the leader on good will. The boss inspires fear; the leader inspires enthusiasm. The boss says I; The leader says WE. The boss fixes the blame for the breakdown; the leader fixes the breakdown. The boss knows how it is done, the leader shows how it is done. The boss says, GO; the leader says LET's GO!"

The purpose of the Coaching Items you will see is to get you 80% of the way there on ideas for improvement and growth for your staff – you probably have better ideas than mine, but perhaps they get you thinking. You will notice that many of the ideas link to courses in MED U – a handy reference.

Within the coaching items are also Productivity Goals. You've probably read the statement, "*what gets measured gets done.*" These Productivity Goals are based on the ideas of several companies like yours from whose goals I did my research.

We discuss annual and periodic evaluations in others parts of this guide (and a form of this Coaching Document is a part of all of those), but the fact is, the best performance management is part of an everyday interaction. Work on one issue, move to another, then to the next. Too often, the only formal coaching and evaluation is at the end of the year. What if, instead, there was formal, documented, but positive coaching throughout the year? That's the purpose of the coaching document.

A Coaching Document is designed to handle one issue at a time, a plan for growth. It is meant to be printed out and signed, by your employee and importantly, by you. That signature is your commitment to help that employee grow.

To create a Coaching Document, open up an Individual Employee's page. As a Super Manager, click on VIEW EMPLOYEES and the list of all employees will come up.

VIEW...

- Job Descriptions**
- Employees**
- Managers**
- Introductory Evaluations**
- Training Documents**
- Coaching Documents**
- Applause Documents**
- Disciplinary Actions**
- Periodic Evaluations**
- Annual Reviews**

MED Supply Company

Click on an employee to open for viewing and editing.

Del?	Employee Name	Employee ID	Job Description	Hire/Eval Date	Status
	Billy Johnson	8998	Billing - Collections and Denials	11/09/2005	Active
	Dolly Madison	4321	Respiratory Therapist - Vent	10/7/2005	Active
	Doug Doug	6489	rehab tech 1	11/17/2006	Active
	Gary Weems	1212	AA HR	10/02/2006	Active
	Glenn Close	6666	CSR 1	10/7/2005	Active
	Han Dee Mann	9834	Administrative Assistant - Service	10/07/2005	Active
	James Doe	9040	customer service rep	10/10/2006	Active
	Jane RT	1569	Respiratory Therapist - Vent	10/05/2006	Active
	Jason Wainright	125	CSR 1	1/30/2006	Active
	JAYCEE MOORE	4506	RESPIRATORY SERVICE TECH 1	03/17/2006	Active
	Jim Smith	1111		10/07/2005	Active

As a Manager, simply enter your Manager's Page for a listing of all of your employees to whom you have access.

Welcome Pam Jones! What would you like to do today?

Employee Name	Employee ID	Job Description	Hire Date	Status
Mary Jones	9236495151	CSR/Reimbursement Specialist	11/30/2005	Active
Pam Torn	9872	Billing - Collections and Denials	11/20/2006	Active
Tony Soprano	4444	Billing - Collections and Denials	10/7/2005	Active
Uma Thurman	976431	Reimbursement Specialist	11/14/2006	Active
William Shatner	676869	Reimbursement Specialist	11/14/2006	Active

Click on the name of the employee you want to edit and their page comes up. Click on create COACHING DOCUMENT.

CREATE...	VIEW...
Training Document	Training Documents
Coaching Document	Coaching Documents
Applause Document	Applause Documents
Disciplinary Action	Disciplinary Actions
Periodic Evaluation	Periodic Evaluations
Annual Review Self-Evaluation	Annual Reviews
Annual Review	Introductory Evaluation
Introductory Evaluation	Job Description

The next page will be a task by task list of what this employee does for a living – specifically the tasks that you and your company chose when you created this employee's job description. Remember that for a Coaching Document, we are working with ONE item at a time.

Please select one coaching item below, then click the Next button.

Job Expectations (select only one):

- Reimbursement Specialist -- Records Management**
 - ◊ Assist in the smooth flow of paperwork and information within the office.
 - ◊ Create and alphabetize file folders.
 - ◊ File documents accurately.
 - ◊ Collect and distribute appropriate records as needed.
 - ◊ Pull inactive files for storage. When appropriate, dispose of documents by shredding or other appropriate means.
 - ◊ As needed, organize and scan documents, make certain hard documents are stored correctly, and pull up scanned images.

- Reimbursement Specialist -- Data**
 - ◊ Fully understand and utilize the computer billing system .
 - ◊ Enter all documentation in the computer system accurately on a daily basis accurately as required.
 - ◊ Prepare reports, as assigned by supervision. Utilize computer generated reports to monitor and maintain appropriate billing practices and to help identify and resolve issues in billing and collections.


- Reimbursement Specialist -- Documentation**
 - ◊ Ensure completion or receipt of all documents needed for billing.
 - ◊ Request assignment of benefits, prescriptions, CMNs, letters of medical necessity and other required information. Follow up on the collection of required documentation.
 - ◊ 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

We've decided we want this employee to do a better job of managing documentation in her role as a reimbursement specialist. On that list is the task Reimbursement Specialist, Documentation. Select that task and click NEXT.

We click NEXT and the Coaching Document comes up. Notice it lists the key elements of that task in the bullet points (and also note that these bullet points are exactly as you edited them when you created this job description).

Job Expectations
Reimbursement Specialist -- Documentation

- ◊ Ensure completion or receipt of all documents needed for billing.
- ◊ Request assignment of benefits, prescriptions, CMNs, letters of medical necessity and other required information. Follow up on the collection of required documentation.
- ◊ 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.
- ◊ Receive, log and track prescriptions and orders from physicians/referral sources.
- ◊ Develop procedures to ensure orders are filled or referred.

Goals & Action Plan 

What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager?

[Click here to insert predefined coaching suggestions based on category.](#)

The other field is the **Goals and Action Plan** field. This is where you will put the comments on the reasons for creating this Coaching Document and the goals you wish to establish. Now, to the coaching suggestions I discussed earlier. Click on the link to **Insert Predefined Coaching Suggestions Based on Category**.

What comes up is a list of Target goals and Productivity goals related directly to this task, this element of this person's job description. Again, you don't have to use any of these suggestions; perhaps they spur you to create your own. What you will notice is that these goals are all achievable/measurable in some way. Goals that cannot be measured (such as improve work) are neither valid nor helpful. Let's select a couple of the goals – a Target goal on Effective collection and a Productivity goal we will set on the percentage of CMNs completed and logged in a week.

Select one or more coaching details below, then click Insert Coaching Details button at the bottom of page to insert text into underlying form.

Reimbursement Specialist -- Documentation

- Target: Effective collection of all required documents**
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.
- Target: Effective collection of all required documents**
Work with the supervisor, the company's trainer, or a skilled peer to identify each document that must be collected and devise or refine the checklist for making certain that is done each time. Get confirmation from management once that is complete, then before the next review, approach 100% efficiency in collecting the proper documents at the proper time.
- Target: CMNS filled out correctly, collected and logged**
Take the MED U course REM 102 – Reimbursement and Documentation and after completion, then work with the supervisor, the company's trainer, or a skilled peer to come up with a process to ensure CMNs are filled out accurately, collected and logged. Get those processes into one easy to understand document for each type of CMN your company uses. Also, work with management and team members to decide on what kind of training or education is also needed for referral sources and as a team (along with sales/marketing) create that educational piece. Complete before the next review.
- Productivity Goal**
By the date noted below, we have agreed upon a goal where an average of _____ CMNs will be produced and mailed.
- Productivity Goal**
By the date noted below, we have agreed upon a goal where you will ensure _____ percent of CMNs produced are completed and logged within one week of their production.
- Productivity Goal**
By the date noted below, we have agreed upon a goal where an average of _____ CMNs will be collected a week/month.
- Productivity Goal**
By the date noted below, we have agreed upon a goal where _____ files will be initiated for new customers.

Select the goals by placing the checkmark in the box and click on INSERT COACHING DETAILS

Insert Coaching Details

Close Window

The goals are now placed in the Goals & Action Plan field. These are fully editable. Note that when we placed the Productivity Goal regarding CMNs, the percentage was blank. Simply highlight, type in "90" (in this case).

If any of these goals involved MED U courses, then click on EMAIL MED UNIVERSITY. That link will automatically bring up your email mechanism on your computer. Simply **copy and paste these goals into the body of that email**, email to us in the address provided, and we will follow through immediately with your employee.

EMAIL MED UNIVERSITY

Goals & Action Plan
What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager? [Click here to insert predefined coaching suggestions based on category.](#)

*** Target: Effective collection of all required documents
 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.

Gary Schwantz/MED Group 12/05/2006 01:56 PM	To: medu@medgroup.com cc: bcc: Subject: MEDU Notification from EmTrak 3.1 - From Pam Jones of MED Supply Company
MEDU Admin, please sign up William Shatner (wshatner@medgroup.com) for the following courses: *** Target: Effective collection of all required documents 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. Pam Jones MED Supply Company	

Follow-up Date & Status

We will put a completion date for two months from now, since they need time to complete the courses and improve performance. Keep the Coaching Document Status as OPEN, since this is just the beginning. There are goals this employee obviously needs to achieve before this document is complete. As the manager, you will get an email reminder 7 days before this follow-up date to remind you to complete the item.

EMAIL MED UNIVERSITY

Goals & Action Plan
What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager? [Click here to insert predefined coaching suggestions based on category.](#)

****Productivity Goal
 By the date noted below, we have agreed upon a goal where you will ensure 90 percent of CMNs produced are completed and logged within one week of their production.


Follow-Up Date
When would you like to follow up on this coaching document?
 Today is 11/29/2006

Coaching Document Status
What is the status of this coaching document?

Click NEXT, print out a couple of copies. Both of you sign, give one to your employee as her and your commitment to these goals and keep another for your records.

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.

- ◊ Receive, log and track prescriptions and orders from physicians/referral sources.
- ◊ Develop procedures to ensure orders are filled or referred.

Goals & Action Plan 

What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager?

** Target: Effective collection of all required documents
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.

****Productivity Goal
By the date noted below, we have agreed upon a goal where you will ensure 90 percent of CMNs produced are completed and logged within one week of their production.

Follow-up Date
When would you like to follow up on this coaching document?
01/18/2007

Coaching Document Status
What is the status of this coaching document?
Open

Employee Signature: _____

Reviewer Signature: _____

Review Date: _____

Completing a Coaching Document

You get a reminder that you set up a Coaching Document for an employee (you will get that reminder via email 7 days before the follow-up date is due). Now it is time to complete the Coaching Document, ensuring that both you and your employee followed through.


First, of course, see if the goals were accomplished. Was there a course to take and report on, a special project, productivity goals? Let's say that the employee accomplished what we wanted. Go to that employee's individual page. The most direct way to get to the document is to click on **VIEW >COACHING DOCUMENTS** .

VIEW...


- [Training Documents](#)
- [Coaching Documents](#)
- [Applause Documents](#)
- [Disciplinary Actions](#)
- [Periodic Evaluations](#)
- [Annual Reviews](#)
- [Introductory Evaluation](#)
- [Job Description](#)

You can also access it through the **EMPLOYEE LOG**, simply click on the date next to the document. Then click on the icon under Original Document.

View Employee Log

Date	Last 5 Log Entries (first 85 characters)
11/30/2006	Periodic Evaluation created by Pam Jones on 11/30/2006
11/29/2006	William was 2 hours late today - 2nd day this week
11/29/2006	 SIGNED JOB DESCRIPTION ATTACHED
11/01/2006	Annual Review created by Pam Jones on 11/01/2006
10/29/2006	Coaching Document created by Pam Jones on 10/29/2006

Log Entry:
Enter comments in the space provided.
 Coaching Document created by Pam Jones on 10/29/2006

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.

Click on **EDIT COACHING DOCUMENT** at the upper left hand side of the document that opens.

Edit Coaching Document **Return to Menu**

Employee Name William Shatner	Job Title Reimbursement Specialist
Department Billing	Manager Pam Jones
Employee ID 676869	Date 11/29/2006

Now, let's note that William completed the goals set. Click on the pencil icon and the date will automatically be entered. Put your comments in the field.

Goals & Action Plan



What is the purpose of this Coaching Document? What goals do you have for the employee? What is your task as manager? [Click here to insert predefined coaching suggestions based on category.](#)

produced are completed and logged within one week of their production.

12/5/2006 1:28 P.M. Williams completed both goals, In fact, CMNs are currently at 100%, exceeding the goal set.

Now set the Coaching Document Status to either COMPLETE or SEALED.

Coaching Document Status
What is the status of this coaching document?

Open ▾

Open

Complete

Sealed

Signature: _____

Reviewer Signature: _____

Review Date: _____

◀ Previous
Next ▶

OPEN means the document hasn't been touched or there is still significant work to do. If a document is OPEN, then you will get email reminders about that document. COMPLETE means that you are done, but that the document can still be edited. Perhaps there is something in the document that needs additional follow-up. Once you know a document is complete, then you may choose to select SEALED. Once the document is SEALED, it cannot be edited. This offers security to your staff member that final documents are the final document.

In this case, with everything accomplished, you should go ahead and choose SEALED. Click NEXT, then close the document, you are done. However, you can always come back to view it at any time, even when it is SEALED.