

OPTICAL EMPLOYEE PERFORMANCE REVIEW FORM

Employee Name: _____
Position: _____ Date of Hire: _____
Last Review Date: _____ Current Review Date: _____
Evaluator: _____

Evaluation key

1. Does not meet expectations, needs improvement
2. Meets expectations, performs at consistent acceptable levels most of the time
3. Exceeds Expectations, performs consistently all of the time

Building Patient Relationships

10% Total Weight

Our overall mission is to create patients for life by ensuring that every patient feels welcomed and they have received the highest level of excellence as well as patient care.

Welcoming the patient	1	2	3
Always a smile in voice	1	2	3
Identifies self to patient	1	2	3
Shows concern about making every patient feel welcome and comfortable in a friendly manner	1	2	3
Does not prejudice a patient	1	2	3
Treats patients as to the way they would wish to be treated	1	2	3
Telephone answered promptly, patient's needs are identified and responded to in a friendly manner	1	2	3
Lifestyle needs are consistently executed including pre-assessing and the doctor hand off	1	2	3

Building Team Relationships

10% Total Weight

Supports practice goals	1	2	3
Supports depart goals	1	2	3
Fulfills responsibilities of the job	1	2	3
Promote enthusiasm and teamwork	1	2	3
Fosters positive working relationships with doctors of optometry and their staff	1	2	3
Positive communication between opticians, manager and other departments	1	2	3

Operations

10% Total Weight

Paperwork	1	2	3
Pays close attention to detail	1	2	3
Documentation to convey communications	1	2	3
Notify patients when orders are ready in prompt manner	1	2	3

Sales

AVERAGE SALE: _____

35% Total Weight

Asks questions / likes and dislikes regarding previous eyewear	1	2	3
Listens carefully to determine problems	1	2	3
Pays close attention to detail	1	2	3
Explains features, advantages & benefits of product	1	2	3
Matches lens style to patient needs	1	2	3
Matches options to patient needs	1	2	3
Uses realistic time frames in promising a job especially custom orders	1	2	3
Takes responsibility in regards to follow through	1	2	3
Learning new product information	1	2	3
Continues to seek knowledge through continuing education	1	2	3
Applies knowledge learned to improve self and patient service	1	2	3

Dispensing**15% Total Weight**

Informs patient on care of lenses, frames, warranty	1	2	3
Verifies accuracy of the order	1	2	3
Sets stage for return visits to adjust eyewear	1	2	3
Thanks a patient for allowing us to serve their needs	1	2	3

Creating Patients for life**20% Total Weight**

Field complaints with performance of product or refraction	1	2	3
Determine appropriate action to satisfy a problem quickly	1	2	3
Communications with lab if not able to ensure good service	1	2	3
Is flexible with patient flow and fluctuates lunch / break times	1	2	3

Remake/Refund/Warranty Average_____

Patient Satisfaction Average_____

Other: