



Personnel Committee Meeting Agenda

August 21, 2023: 9:30 a.m. – 11:00 a.m.

In-person Locations:

Partnership's Fairfield Office located at 4665 Business Center Drive, Fairfield, CA 94534

Partnership's Redding Office located at 2525 Airpark Drive, Redding, CA 96001

Partnership's Eureka Office located at 1036 5th Street, Suite E, Eureka, CA 95501

Partnership's Auburn Office located at 281 Nevada Street, Auburn, CA 95603

Public Participation

Public comment is welcome during designated "Public Comments" time frames or by emailing comments to the Board Clerk at Board_FinanceClerk@partnershiphp.org. Comments received will be read during the meeting.

9:30 A.M. – Opening			
1.1	Call to Order		Naomi Gordon
1.2	Roll Call		Clarissa Domingo
1.3	Public Comments <i>At this time, members of the public may address the committee on any non-agenda item of interest to the public that is within the subject matter jurisdiction of the Personnel Committee. The public is also welcome to comment on any agenda item during the committee's consideration of the agenda item. Speakers will be limited to three (3) minutes.</i>	N/A	Public
1.4	INFORMATION: PHC's 2024 Benefit Highlights <i>This request is for the Personnel Committee to review benefits offered to PHC employees.</i>	3-14	Naomi Gordon
1.5	INFORMATION: PHC's 2023 Human Resources Benefits Portfolio <i>This request is for the Personnel Committee to review the benefits analysis given to PHC employees.</i>	15	Naomi Gordon
1.6	ACTION: PHC's Human Resources Policies <i>This request is for the Personnel Committee to review and recommend approval to the full Board of HR Policies that apply to PHC employees.</i> Group 1: Policies Containing Changes <ul style="list-style-type: none"> HR115 – Discrimination, Harassment, and Retaliation Prevention HR213 – Job Descriptions 	16-20 22-27	Naomi Gordon

	<ul style="list-style-type: none"> • HR504 – Overtime 28-31 • HR506 – Employee Reimbursement for Employee Growth & Career Development 32-39 • HR509 – Bilingual Standards & Compensation 40-43 • HR511 – Attendance & Punctuality 44-55 • HR512 – Mileage Reimbursement 56-60 • HR514 – Employee Growth & Career Development 61-72 • HR604 – Spot Bonus 73-77 • HR605 – Management Incentive Program 78-83 • HR606 – Employee Award Program 84-87 • HR608 – Employee Recognition 88-94 • HR610 – Holiday Pay 95-99 • HR701 – Paid Time Off (PTO) 100-105 • HR702 – Paid Time Off Cash-Out Program 106-109 • HR703 – Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave 103-124 • HR706a – 9/80 Workweek (Exempt) 125-134 • HR706b – 9/80 Workweek (Non-Exempt) 135-142 • HR710 – Paid Sick Leave (PSL) 143-148 • HR712 – Other Leaves 149-160 • HR803 – Workers Compensation 161-166 <p>Group 2: Policies Containing No-Changes</p> <ul style="list-style-type: none"> • HR210 – Working Out of Job Class 167-168 • HR404 – Performance Reviews 169-172 • HR407 – Suspected Abuse or Neglect of Members 173-175 • HR508 – Compensation 176-179 • HR515 – Relocation & Moving Expenses 180-182 • HR901 – Severance Pay 183 		
1.7	INFORMATION: PHC's 2024 Event Calendar <i>This request is for the Personnel Committee to review the 2022 Event Calendar available for all PHC employees.</i>	184	Naomi Gordon
11:00 A.M. – Adjournment			
2.1	Meeting adjourned	N/A	Naomi Gordon

Government Code §54957.5 requires that public records related to items on the open session agenda for a regular commission meeting be made available for public inspection. Records distributed less than 72 hours prior to the meeting are available for public inspection at the same time they are distributed to all members, or a majority of the members of the Commission. The Commission has designated the Board Clerk as the contact for Partnership HealthPlan of California located at 4665 Business Center Drive, Fairfield, CA 94534, for the purpose of making those public records available for inspection. The Board Meeting Agenda and supporting documentation is available for review from 8:00 AM to 5:00 PM, Monday through Friday at all PHC regional offices (see locations above). It can also be found online at www.partnershiphp.org. PHC meeting rooms are accessible to people with disabilities. Individuals who need special assistance or a disability-related modification or accommodation (including auxiliary aids or services) to participate in this meeting, or who have a disability and wish to request an alternative format for the agenda, meeting notice, agenda packet or other writings that may be distributed at the meeting, should contact the Board Clerk at least ten (10) days prior to the scheduled meeting at (707) 863-4516 or by email at Board_FinanceClerk@partnershiphp.org. Notification in advance of the meeting will enable the Board Clerk to make reasonable arrangements to ensure accessibility to this meeting and to materials related to it.

Employee Benefit Highlights



2024

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Our Mission Statement

To help our members, and the communities we serve, be healthy

Working Together Value Statement

We, the PHC team, want a health plan that our employees and the community are proud of and committed to. Therefore, we have adopted this value statement: We want our employees, members, and health care providers to know they are valued, respected, and involved in our endeavors. We aspire to provide high-quality service while meeting the needs of our community and employees.

TEAMWORK

- We believe all team members are valuable and deserving of respect.
- We strive to be open and honest in our communication with each other.
- Differing viewpoints are valued.
- We work together in a cooperative and a collaborative spirit to solve problems for employees, members, and providers.

DIVERSITY

- We value a diverse work force at all levels of the organization.
- We aspire to understand differences and to foster collaboration.
- We value all the cultures among our employees and within our community.
- We treat each other, our members, and providers with courtesy and respect.

ENVIRONMENT

- A spirit of humor and fun is essential to employee satisfaction and high morale.
- We are dedicated to employee development through training and opportunities for growth.
- We strive to create a harmonious and safe work environment.
- PHC growth will be accomplished through operational planning with realistic expectations and participation from employees.
- We believe a strong commitment to equal employment opportunity is more than a legal and moral obligation — it is also sound business practice to realize the potential of every individual.

Pay Information

Paydays

Employees are paid every other Thursday. All non-exempt employees must complete timesheets and turn in to their supervisor/manager by 8:00 a.m. on the Monday preceding payday. All exempt employees must complete their electronic timesheets and turn in to their supervisor/manager by 8:00 a.m. on the Friday preceding payday.

Direct Deposit

If you would like to have your paycheck deposited directly to your bank account, please follow the instructions for Direct Deposit Enrollment on the ADP Portal Home Page. You may indicate the amount you wish to have allotted (dollar amount OR percentage) in up to five accounts total, three checking and two savings.

Medical Benefits

Eligibility

All full time active employees working a minimum of 30 hours per week become eligible on the first of the month following date of hire.

Medical

Under PHC's health coverage plan, employees have the option of choosing between: Kaiser HMO or Health Savings Account (HSA); Western Health Advantage HMO; or Blue Shield HMO, PPO, and Health Savings Account (HSA) healthcare providers. The cost of coverage is paid primarily by PHC.

The medical plan is conducted on an open enrollment basis, which occurs once a year. During open enrollment, employees may transfer to a different plan or enroll dependents at that time.

Cost to Employee (EE)

2024 Employee Cost Per Pay Period

	Blue Shield of California Access + HMO 20-250	Blue Shield of California Custom PPO Deductible 20-500	Blue Shield of California Full PPO Savings 2250/2800/4500*	Kaiser Permanente Traditional HMO 20	Kaiser Permanente HSA Deductible HMO*	Western Health Advantage Premier 20 HMO
EE	\$13.62	\$14.05	\$16.56	\$12.91	\$17.77	\$11.98
EE + 1	\$111.71	\$115.22	\$123.74	\$103.58	\$141.38	\$93.42
EE + Family	\$174.92	\$180.42	\$175.95	\$175.07	\$204.19	\$144.91

- Medical Waive Credit: \$138.50 per pay period
- Dental/Vision Waive Credit: \$18.50 per pay period
- Includes HSA monthly contributions of **\$345.83/\$691.67** month for Blue Shield HSA members
- Includes HSA monthly contributions of **\$345.83/\$691.67** month for Kaiser HSA members

Kaiser Permanente/Western Health Advantage

	Kaiser Permanente		Western Health Advantage
	HSA Deductible HMO	Traditional HMO 20	Premier 20 HMO
Individual Deductible	\$2,000	\$0	\$0
Family Deductible	\$4,000	\$0	\$0
Individual Out of Pocket Max.	\$3,200	\$1,500	\$1,500
Family Out of Pocket Max.	\$6,000	\$3,000	\$2,500
Office Visit	\$30*	\$20	\$20
Specialist Visit	\$30*	\$35	\$20
Preventive Care/Well Baby	\$0	\$0	\$0
Chiropractic/Acupuncture	N/A	\$10 (30 combined visits)	\$15 (20 visits each)
Diagnostic Lab/X-Ray	\$10*	\$0	\$0
Complex Radiology (CT, MRI, PET)	\$50*	\$0	\$0
Inpatient Hospital	\$250/admit*	\$250/admit	\$0
Outpatient Surgery	\$150/procedure*	\$100/procedure	\$100/visit
Urgent Care	\$30*	\$20	\$35
Emergency (waived if admitted)	\$100*	\$100	\$100
Rx Generic	\$10	\$10	\$10
Rx Brand Name	\$30	\$30	\$30
Rx Specialty	20% up to \$150	25% up to \$150	\$50
Group No. Phone No. Web	39768 800-464-4000 www.kp.org		107887 888-563-2250 www.westernhealth.com

*Calendar year deductible applies

Blue Shield of California

	Blue Shield of California		
	Custom PPO Deductible 20-500	Full PPO Savings 2250/3000/4500	Access + HMO 20-250
Individual Deductible	\$500	\$2,250	\$0
Family Deductible	\$1,000	\$4,500	\$0
Individual Out of Pocket Max.	\$3,500	\$3,500	\$2,000
Family Out of Pocket Max.	\$7,000	\$7,000	\$4,000
Office/Specialist Visit	\$20/\$20	20%*/20%*	\$20/\$30
Teladoc	\$0	\$0	\$0
Preventive Care/Well Baby	\$0	\$0	\$0
Chiropractic/Acupuncture*	\$25 (20 visits each)	20%* (20 visits each)	\$10 (30 combined visits)
Diagnostic Lab/X-Ray	\$20*	20%*	\$0
Complex Radiology (CT, MRI, PET)	\$60*	20%*	\$0
Inpatient Hospital	\$100 + 20%*	20%*	\$250
Outpatient Surgery	20%*	20%*	\$200
Urgent Care	\$20	20%*	\$20
Emergency (waived if admitted)	\$100 + 20%	\$150 + 20%*	\$150
Rx Tier 1	\$10	\$10*	\$10
Rx Tier 2/Tier 3	\$30/\$50	\$25*/\$40*	\$30/\$50
Rx Tier 4	30% up to \$250	30% up to \$250*	20% up to \$250
Group No. Phone No. Web	W0053649 888-256-3650 www.blueshieldca.com		

*Calendar year deductible applies

Dental Benefits

Eligibility

A full time employee working a minimum of 30 hours per week becomes eligible on the first day of the month following date of hire.

Cost to Employee

Currently PHC is paying the premium costs for employees and their dependents.

Enrolling Your Dependents:

Your dependents must be enrolled when you first become eligible or on the first day of the month after they become dependents.

Direct Dental

Deductible	\$50 Per Person/\$150 Per Family(waived for diagnostic & preventative)
Diagnostic & Preventative	100%
Basic	90%
Major	60%
Calendar Year Max.	\$3,000 Per Person
Ortho	50% up to \$1,500 Lifetime Per Person

Dental Insurance

Partnership HealthPlan offers its employees and their eligible dependents dental coverage through Direct Dental. The Direct Dental plan provides comprehensive dental care coverage including orthodontia coverage for adults and children.

While you may see any provider, this plan has access to the Dental Health Alliance (DHA) PPO Network. When you visit a DHA in network provider, fees may be up to 30% less than an out of network provider. Visit www.directdentalplans.com to find a DHA network dentist near you.

Dental	In Network	Out of Network
Preventive Services (exams, cleanings, x-rays)	100%	100%
Basic Services (basic fillings, extractions and oral surgery)	90%	80%
Major Services (crowns, inlays and on-lays, bridges and dentures)	60%	50%
Deductible	\$50 individual/\$150 family	\$50 individual/\$150 family
Maximum Benefit	\$3,000 per calendar year (per member)	\$3,000 per calendar year (per member)
Orthodontic (adult and child)	50% up to \$1,500 lifetime	
Group No. PHP0116	855-844-0626	www.directdentalplans.com

Vision Service Plan

Deductible	\$20.00
Exam	Every 12 months
Lenses	Every 12 months
Frames	Every 24 months

Vision

Partnership HealthPlan employees are offered vision benefits through VSP, which has over 23,000 doctors located in rural and metropolitan areas throughout the nation. Visit www.vsp.com and search using the VSP Signature Network.

VSP Signature Network	In Network
Office Visit / Examination (every 12 months)	\$20 copay
Lens Replacement (every 12 months)	100% after copay
Single Vision	100% after copay
Bifocal	100% after copay
Trifocal	100% after copay
Frame Replacement (every 24 months)	\$150 allowance + 20% discount
Contact Lenses (in lieu of glasses, every 12 months)	\$130 allowance + up to \$60 copay
Group No. 12251672	800-877-7195 www.vsp.com

Dental/Vision Waive Credit: If you choose to waive both dental and vision coverage, you will be eligible to receive a credit of \$18.50 per pay period.

Mutual of Omaha PHC Sponsored Group Benefits

Short Term Disability

Benefit Amount	60% of your weekly earnings, to max of \$2,310/week
Elimination Period	7 days injury/7 days sickness
Duration	25 weeks
Premium	Employer paid

Long Term Disability

Benefit Amount	60% of monthly earning, to max \$10,000/month
Definition of disability	3 year usual occupation
Elimination Period	180 days
Duration	Based on age when disability occurs
EAP	Included
Premium	Employer Paid

Life & AD&D

Benefit Amount	1 X Annual earning to a maximum benefit of \$150,000
Accelerated Death Benefit	100% to \$150,000
Survivor Support	Included
Portability	You may take coverage with you according to terms of contract
Life Planning Financial and Legal Resources	Included
Life Benefit Reduction Premium	65% at age 70 and 50% at age 75 Employer paid

UNUM Voluntary Benefits

Eligible to enroll during annual benefit open enrollment period to be effective January 1 of the following year.

Accident Insurance

- Covers off-the-job accidents
- Fully portable
- Level premiums – premiums not based on age
- Over 70 accidents and treatments covered

Critical Illness Insurance

- Employee benefit options: \$5,000 to \$50,000 in \$5,000 increments
- Spouse coverage available
- Spouse benefit options: \$5,000 to \$30,000 in \$5,000 increments
- Fully portable
- Dependent children automatically covered at 25% of benefit amount
- Can be used once for different conditions; each condition is payable once per lifetime

Whole Life Insurance

- Level Premium – Premium rates do not increase as you get older
- Level Death Benefit – Death benefit does not reduce as you get older
- Coverage Options:
 - o Employee - \$2,000 – \$300,000
 - o Spouse - \$2,000 - \$75,000
 - o Children - \$5,000 - \$50,000
- 100% Portable – you can take this policy with you at the exact same premiums if you leave or retire from your company coverage on an eligible family member

Cafeteria Plan-Flexible Spending Account-Health and Dependent Care

This plan allows employees to pay out-of-pocket Health and Dependent care expenses with **pre-tax dollars** through payroll deduction (i.e., co-payments, vision expenses not covered by your vision plan, dental and orthodontia expenses not covered by your dental plan, mental health costs, child care, preschool, etc.). This benefit is effective the 1st of the month after date of hire.

Dependent Care Account: allows employees to pay for qualified day care expenses with **pre-tax dollars** through payroll deduction. Maximum allowed: \$5,000.00. Plan year effective January 1 through December 31.

Health Care Account: Allows employees to pay for health care expenses with **pre-tax dollars** through payroll deduction. Maximum allowed: \$3,200.00. Plan year effective January 1 through December 31.

Paid Time Off (PTO)

Our Paid Time Off Plan (PTO) is offered to employees to take time off for the following: vacation, short-term illness, family illness and doctor/dentist appointments, emergencies, religious observances, preventative health, and personal business.

PTO is accrued based on hours paid, excluding overtime in excess of 80 hours. PTO begins accruing from date of hire. Employees are eligible to use their PTO at the completion of 90 days of employment.

Annual Paid Time Off Benefits Accrual Schedule				
Fulltime (80 Hours Per Pay Period)				
Years of Service	Accrual Benefits	Annual Accrual		PTO CAP
		Hours Per Year	Days Per Year	
0 through 4 years	6.4615 hrs	168 hrs per year	21 days per year	336 hrs
5 through 9 years	8.0000 hrs	208 hrs per year	26 days per year	416 hrs
10+ years over	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
Annual Paid Time Off Benefits Accrual Schedule (Senior Directors)				
0 through 4 years	8.0000 hrs	208 hrs per year	26 days per year	416 hrs
5 through 9 years	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
10+ years over	11.0769 hrs	288 hrs per year	36 days per year	576 hrs
Annual Paid Time Off Benefits Accrual Schedule (Chiefs)				
0 through 4 years	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
5 through 9 years	11.0769 hrs	288 hrs per year	36 days per year	576 hrs
10+ years over	12.6154 hrs	328 hrs per year	41 days per year	656 hrs

PTO Cash-Out Program

After one (1) year of employment, employees are eligible to cash-out up to their maximum annual PTO accrual during PHC's Annual Open Enrollment period. There are two (2) PTO cash-out pay dates. The cash-out occurs on the first payday in June and/or the first payday in December. Two cash-out pay dates may be elected, not to exceed maximum annual PTO accrual.

Paid Sick Leave (PSL)

Full Time employees receive 50 hours of Protected Paid Sick Leave (PSL). Part Time employees receive 40 hours of Protected Paid Sick Leave (PSL). New employees will receive Paid Sick Leave (PSL) on their date of hire, however, cannot be utilized until after 90 days of employment has been met. Any unused Paid Sick Leave (PSL) hours remaining on December 31, will be forfeited. Paid Sick Leave (PSL) hours will reset back to 50 available hours for Full Time employees and 40 hours for Part Time employees on January 1 of the following year. Paid Sick Leave (PSL) can be used for the employee and/or family member of the employee for the following: short-term illness, family illness and doctor/dentist appointments, health emergencies, preventative health.

PHC Holidays

- ▶ New Year's Day
- ▶ Martin Luther King Jr. Day
- ▶ Presidents' Day
- ▶ Memorial Day
- ▶ Independence Day
- ▶ Labor Day
- ▶ Thanksgiving Day
- ▶ Friday after Thanksgiving
- ▶ Christmas Eve
- ▶ Christmas Day
- ▶ Cultural Diversity Holiday (CDH)*

*In an effort to recognize our multi-cultural workforce, PHC is providing staff with an 8-hour Cultural Diversity Holiday (CDH). This day must be used for religious or cultural holidays, employee birthdays, or other state or federal holiday during which PHC remain open.

When a holiday falls on a Saturday, it is observed the preceding Friday. When it falls on a Sunday, it is observed the following Monday.

Tuition Reimbursement

PHC encourages employee development and training related to improving and strengthening the operations of PHC. The concurrence of the Department Director, Director of Finance, and Executive Director is required in advance of employees attending qualified educational functions paid for by PHC. When approved, the employee's education expenses will be paid for by the department through their annual educational budget, up to \$4,000.00. Employees who voluntarily leave the employ of PHC within six (6) months of completing a PHC-paid training and/or education function are required to reimburse PHC for all costs that were paid by PHC.

Employee Assistance Program

PHC has established the Employee Assistance Program (EAP) to provide confidential information, referral, and consultation to employees and their families. The EAP is a program designed to help employees and their families deal with a wide range of personal problems as well as assist in developing healthy lifestyles that promote physical and mental wellbeing. The Employee Assistance Program is available to all employees and their qualified family members living with the employee (includes domestic partner).

Commuter Benefits

To help save money on commuting costs and provide a stress-free way for employees to arrive at work on time, PHC implemented a commuter benefit program that offers an employer provided subsidy. With this benefit, PHC will reimburse employees who commute to work by public transit (bus, rail, or ferry) or vanpool up to \$75/month.

2023 Human Resources Benefits Portfolio

Employee Name

Your Benefits

Health & Insurance	\$
Medical	\$
Dental	\$
Vision	\$
Term Life Insurance	\$
AD&D Insurance	\$
STD/LTD Insurance	\$

Retirement	\$
401A Employer Match	\$
457 Employer Match	\$

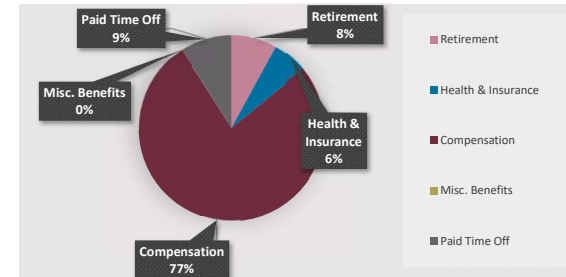
Paid Time Off	\$
PTO	\$
Holidays (Includes CDH)	\$
PSL	\$
ESL*	\$

Misc. Benefits	\$
Employee Assistance Program	\$
License Renewal/Membership Dues*	\$
Tuition/Certification Reimbursement*	\$
Cell Phone*	\$
Bilingual Pay*	\$
Referral Award Bonus*	\$

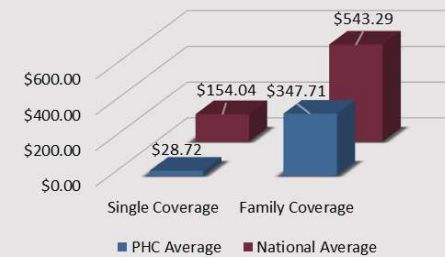
Compensation	\$
Annual Salary	\$
Annual Bonus	\$
Supplemental Wages*	\$



Benefits Breakdown



Monthly Benefit Cost Comparison



PHC Monthly Medical Share of Cost

Data Reflects 2023 Family Plan Options



Your Total Compensation Package

\$

*If applicable

Note: Reasonable measures have been taken to ensure this statement is an accurate annualized estimate of your compensation but is not a guarantee of benefits or compensation.

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR115			Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2024 01/01/2025 Last Review Date: 01/01/2023 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: <i>Liz Gibboney</i> <i>Sonja Bjork</i>			Approval Date: 01/01/2023 01/01/2023	

I. RELATED POLICIES:

- A. [HR101](#)
- B. [HR103](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. Harassment: includes disrespectful or unprofessional conduct based on any of the protected characteristics listed in section VI, A, 1. Harassment can be verbal (such as slurs, jokes, insults, epithets, gestures, or teasing), graphic (such as offensive posters, symbols, cartoons, drawings, computer displays, or emails), or physical conduct (such as physically threatening another person, blocking someone's way, etc.).
- B. Sexual harassment: may include all of the actions in the harassment definition, as well as other sex-based conduct (even if not motivated by sexual desire), such as sexual advances, requests for sexual favors, conversations regarding sexual activities, or other verbal or physical conduct of a sexual nature.

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide all employees with appropriate guidelines regarding standards for discrimination, harassment, and retaliation prevention.

VI. POLICY / PROCEDURE:

- A. Discrimination, Harassment, and Retaliation Prevention
 - 1. As further described below, company policy and the law prohibit discrimination and harassment based on an individual's race, ancestry, religion or religious creed (including religious dress and grooming practices), color, age (40 and over), sex, gender, sexual orientation, gender identity or expression, genetic information, national origin (including language use restrictions), hair texture and protective hairstyles (including afros, braids, locks, and twists), marital status, medical condition (including cancer and genetic characteristics), physical or mental disability (including HIV and AIDS), military or veteran status, pregnancy, childbirth, breastfeeding and related medical conditions, reproductive health decision-making, off-duty use of cannabis (that does not cause on-the-job impairment), denial of Family and Medical Care leave, or any other classification protected by federal, state, or local laws, regulations, or ordinances.

Policy/Procedure Number: HR115		Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2023 01/01/2025 Last Review Date: 01/01/2022 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

2. Our policy and the law prohibit coworkers, third parties, supervisors, and managers from engaging in such conduct.
- B. Equal Employment Opportunity/Anti-Discrimination
1. Partnership HealthPlan of California (Partnership) is an equal opportunity employer. We enthusiastically accept our responsibility to make employment decisions without regard to any of the categories listed above. Our management is dedicated to ensuring the fulfillment of this policy with respect to hiring, placement, promotion, transfer, demotion, layoff, termination, recruitment advertising, pay, and other forms of compensation, training, and general treatment during employment.
 2. We also recognize and support our obligation to reasonably accommodate employees with disabilities or religious beliefs or practices who are able to perform the essential functions of their positions, with or without reasonable accommodation. Partnership will provide reasonable accommodation to any such employee, unless doing so would impose an undue hardship on the company. If you believe you need a reasonable accommodation, please discuss the matter with your supervisor or Human Resources.
- C. No Harassment
1. Partnership does not tolerate harassment of our job applicants, contractors, volunteers, interns, employees, or any other professional contact by another employee, vendor, customer, or any third party based on any of the protected bases identified in section A. Partnership has zero tolerance for harassment and is committed to a workplace free of any harassment.
 2. Reference the definitions for harassment and sexual harassment. Such conduct violates this policy, even if it is not unlawful. Because it is difficult to define unlawful harassment, employees are expected to behave at all times in a professional and respectful manner.
- D. Prohibited Conduct
1. Examples of conduct that violates this policy include:
 - a. Unwelcome sexual advances, flirtations, advances, leering, whistling, touching, pinching, assault, blocking normal movement
 - b. Requests for sexual favors or demands for sexual favors in exchange for favorable treatment
 - c. Obscene or vulgar gestures or comments based on any protected characteristic
 - d. Derogatory cartoons, posters, or drawings based on any protected characteristic
 - e. Uninvited touching of a sexual nature
 - f. Conduct or comments consistently targeted at only one gender, even if the content is not sexual
 - g. Teasing or other similar conduct directed toward a person because of any protected characteristic
 2. All such conduct is unacceptable in the workplace and in any work-related settings, such as business trips and business-related social functions, regardless of who is engaging in the conduct.
- E. Reporting Complaints
1. If you believe someone has violated this policy, please bring the matter to the attention of the Senior Director of Human Resources, HR management, or a supervisor orally or in writing. If you make a complaint under this policy and do not receive a satisfactory response within five (5) business days, please contact the Senior Director of Human Resources or HR management immediately.
 2. Any supervisor who learns of any potential misconduct related to this policy must immediately report the matter to the Senior Director of Human Resources or HR management so the company can try to resolve the claim internally.
 3. As further described below, when an employee or other individual brings a complaint under this policy, Partnership's complaint process ensures such complaints receive:
 - a. Partnership's designation of confidentiality, to the extent possible;
 - b. A timely response;
 - c. An impartial and timely investigation by qualified personnel;

Policy/Procedure Number: HR115		Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2023 01/01/2025 Last Review Date: 01/01/2022 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- d. Documentation and tracking for reasonable progress;
- e. Appropriate options for remedial actions and resolutions; and
- f. Timely closure.
- 4. When Partnership receives allegations of potential misconduct related to this policy, it will conduct a fair, timely, impartial, and thorough investigation, commensurate with the circumstances. The investigation will provide all parties appropriate due process and reach reasonable conclusions based on the evidence collected. To the extent possible, Partnership will endeavor to keep the reporting employee's concerns and the investigation confidential. Of course, Partnership cannot promise complete confidentiality because there are circumstances in which it may need to speak with others about the complaint or investigation (for example, identified witnesses). All employees are expected to fully cooperate with company-initiated investigations. This includes, but is not limited to, maintaining an appropriate level of discretion regarding the investigation and disclosing any and all information that may be pertinent to the investigation. Upon completion of the investigation, if misconduct that violates this policy is found, Partnership will take appropriate remedial measures and preventive action.
- 5. Partnership hopes you will take advantage of this complaint process so we can take steps to address and resolve your concerns. However, you may also bring your complaints to the California Civil Rights Department or the Equal Employment Opportunity Commission. You can find contact information for these agencies in the phone book or on the Internet. You can find more information about sexual harassment prevention at the California Civil Rights' Department website at <https://civildrights.ca.gov/shpt/>.
- F. No Retaliation
 - 1. Partnership prohibits retaliation for reporting perceived violations of this policy, requesting a reasonable accommodation, or participating in the investigation of a complaint. If you believe someone has violated this policy against retaliation, please notify us immediately as provided in "Reporting Complaints" above.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Senior Director of Human Resources, Manager of Human Resources, Supervisors

X. REVISION DATES:

01/01/2020, 04/30/2020, 01/01/2023, 01/01/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR115			Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 01/18/2024	

I. RELATED POLICIES:

- A. [HR101](#)
- B. [HR103](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. Harassment: includes disrespectful or unprofessional conduct based on any of the protected characteristics listed in section VI, A, 1. Harassment can be verbal (such as slurs, jokes, insults, epithets, gestures, or teasing), graphic (such as offensive posters, symbols, cartoons, drawings, computer displays, or emails), or physical conduct (such as physically threatening another person, blocking someone's way, etc.).
- B. Sexual harassment: may include all of the actions in the harassment definition, as well as other sex-based conduct (even if not motivated by sexual desire), such as sexual advances, requests for sexual favors, conversations regarding sexual activities, or other verbal or physical conduct of a sexual nature.

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide all employees with appropriate guidelines regarding standards for discrimination, harassment, and retaliation prevention.

VI. POLICY / PROCEDURE:

- A. Discrimination, Harassment, and Retaliation Prevention
 - 1. As further described below, company policy and the law prohibit discrimination and harassment based on an individual's race, ancestry, religion or religious creed (including religious dress and grooming practices), color, age (40 and over), sex, gender, sexual orientation, gender identity or expression, genetic information, national origin (including language use restrictions), hair texture and protective hairstyles (including afros, braids, locks, and twists), marital status, medical condition (including cancer and genetic characteristics), physical or mental disability (including HIV and AIDS), military or veteran status, pregnancy, childbirth, breastfeeding and related medical conditions, reproductive health decision-making, off-duty use of cannabis (that does not cause on-the-job impairment), denial of Family and Medical Care leave, or any other classification protected by federal, state, or local laws, regulations, or ordinances.

Policy/Procedure Number: HR115		Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

2. Our policy and the law prohibit coworkers, third parties, supervisors, and managers from engaging in such conduct.
- B. Equal Employment Opportunity/Anti-Discrimination
1. Partnership HealthPlan of California (Partnership) is an equal opportunity employer. We enthusiastically accept our responsibility to make employment decisions without regard to any of the categories listed above. Our management is dedicated to ensuring the fulfillment of this policy with respect to hiring, placement, promotion, transfer, demotion, layoff, termination, recruitment advertising, pay, and other forms of compensation, training, and general treatment during employment.
 2. We also recognize and support our obligation to reasonably accommodate employees with disabilities or religious beliefs or practices who are able to perform the essential functions of their positions, with or without reasonable accommodation. Partnership will provide reasonable accommodation to any such employee, unless doing so would impose an undue hardship on the company. If you believe you need a reasonable accommodation, please discuss the matter with your supervisor or Human Resources.
- C. No Harassment
1. Partnership does not tolerate harassment of our job applicants, contractors, volunteers, interns, employees, or any other professional contact by another employee, vendor, customer, or any third party based on any of the protected bases identified in section A. Partnership has zero tolerance for harassment and is committed to a workplace free of any harassment.
 2. Reference the definitions for harassment and sexual harassment. Such conduct violates this policy, even if it is not unlawful. Because it is difficult to define unlawful harassment, employees are expected to behave at all times in a professional and respectful manner.
- D. Prohibited Conduct
1. Examples of conduct that violates this policy include:
 - a. Unwelcome sexual advances, flirtations, advances, leering, whistling, touching, pinching, assault, blocking normal movement
 - b. Requests for sexual favors or demands for sexual favors in exchange for favorable treatment
 - c. Obscene or vulgar gestures or comments based on any protected characteristic
 - d. Derogatory cartoons, posters, or drawings based on any protected characteristic
 - e. Uninvited touching of a sexual nature
 - f. Conduct or comments consistently targeted at only one gender, even if the content is not sexual
 - g. Teasing or other similar conduct directed toward a person because of any protected characteristic
 2. All such conduct is unacceptable in the workplace and in any work-related settings, such as business trips and business-related social functions, regardless of who is engaging in the conduct.
- E. Reporting Complaints
1. If you believe someone has violated this policy, please bring the matter to the attention of the Senior Director of Human Resources, HR management, or a supervisor orally or in writing. If you make a complaint under this policy and do not receive a satisfactory response within five (5) business days, please contact the Senior Director of Human Resources or HR management immediately.
 2. Any supervisor who learns of any potential misconduct related to this policy must immediately report the matter to the Senior Director of Human Resources or HR management so the company can try to resolve the claim internally.
 3. As further described below, when an employee or other individual brings a complaint under this policy, Partnership's complaint process ensures such complaints receive:
 - a. Partnership's designation of confidentiality, to the extent possible;
 - b. A timely response;
 - c. An impartial and timely investigation by qualified personnel;

Policy/Procedure Number: HR115		Lead Department: Human Resources	
Policy/Procedure Title: Discrimination, Harassment, and Retaliation Prevention		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/10/2016		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- d. Documentation and tracking for reasonable progress;
- e. Appropriate options for remedial actions and resolutions; and
- f. Timely closure.
- 4. When Partnership receives allegations of potential misconduct related to this policy, it will conduct a fair, timely, impartial, and thorough investigation, commensurate with the circumstances. The investigation will provide all parties appropriate due process and reach reasonable conclusions based on the evidence collected. To the extent possible, Partnership will endeavor to keep the reporting employee's concerns and the investigation confidential. Of course, Partnership cannot promise complete confidentiality because there are circumstances in which it may need to speak with others about the complaint or investigation (for example, identified witnesses). All employees are expected to fully cooperate with company-initiated investigations. This includes, but is not limited to, maintaining an appropriate level of discretion regarding the investigation and disclosing any and all information that may be pertinent to the investigation. Upon completion of the investigation, if misconduct that violates this policy is found, Partnership will take appropriate remedial measures and preventive action.
- 5. Partnership hopes you will take advantage of this complaint process so we can take steps to address and resolve your concerns. However, you may also bring your complaints to the California Civil Rights Department or the Equal Employment Opportunity Commission. You can find contact information for these agencies in the phone book or on the Internet. You can find more information about sexual harassment prevention at the California Civil Rights' Department website at <https://calcivilrights.ca.gov/shpt/>.
- F. No Retaliation
 - 1. Partnership prohibits retaliation for reporting perceived violations of this policy, requesting a reasonable accommodation, or participating in the investigation of a complaint. If you believe someone has violated this policy against retaliation, please notify us immediately as provided in "Reporting Complaints" above.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Senior Director of Human Resources, Manager of Human Resources, Supervisors

X. REVISION DATES:

01/01/2020, 04/30/2020, 01/01/2023, 01/01/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR213			Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 05/11/2015		Next Review Date: 02/02/2024 <u>02/26/2025</u> Last Review Date: 02/02/2023 <u>02/26/2024</u>		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Liz Gibboney <u>Sonja Bjork</u>			Approval Date: <u>06/28/2022</u>	

I. RELATED POLICIES:

A. N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. Market: The salary that is determined (based on market conditions) by looking at similar positions within the same industry and geographical location. Market 50th may not align with the Wage & Grade table midpoint but will always be within range of the grade.

IV. ATTACHMENTS:

- A. [Proposed Job Description Request](#)
- B. [Job Description Template](#)
- C. [Job Description Guiding Document](#)
- D. [Job Description Workflow](#)

V. PURPOSE:

To provide directors/managers with appropriate job description guidelines.

VI. POLICY / PROCEDURE:

- A. PHC Job Library
 - 1. All approved job descriptions are stored in the PHC Job Library located on PHC4Me.
 - 2. Only those job descriptions found in the PHC Job Library are available for use. Examples of use include employee reviews, hiring, promotions, etc.
 - a. Do not submit an Employee Requisition for hiring until the job description is available in the PHC Job Library. All Employee Requisition requests will be returned to submitter and directed to follow the Manage by Exception process (see Section B) if the job description is not available in the PHC Job Library at the time of receipt.
 - b. If a promotion request requires a new job description, the "Proposed Job Description Request" form (attachment A) must be submitted to the hrhelpdesk@partnershiphp.org with the proposed job description and promotion request form.
 - 3. In order to maintain the PHC Job Library, several job descriptions have been consolidated across the company for use by multiple departments. Changes to these consolidations are only allowed by following the Manage by Exception process. The changes would be permanent and would affect all positions across the company that are identified under that job description. Requests for a temporary

Policy/Procedure Number: HR213		Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 05/11/2015		Next Review Date: 01/01/202302/26/2025 Last Review Date: 05/19/202202/26/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

change to a job description in the PHC Job Library is not allowed.

4. Education requirements listed on a job description in the PHC Job Library are the minimum requirements. If something other than what is listed is desired, departments should evaluate the needs of their position and decide if another job description is a better fit. Several job descriptions have levels (I, II, III, Senior, etc.) that require varied education.
5. All departments must use the PHC Job Library. It is encouraged to use an existing job description in the PHC Job Library instead of requesting to create a new job description. However, unique positions not found anywhere else in the company may require creating a new job description. Any job descriptions not found on the PHC Job Library will need to follow the Manage by Exception process.

B. Manage by Exception Process

Requests to create a new job description should be made only after review of the PHC Job Library and determining that the new position is truly unique when compared to other positions across the company. Requests to edit a current job description in the PHC Job Library must follow this process:

1. Complete the “Proposed Job Description Request” form (attachment A). The requestor and department head must sign the form. Send the signed form and a draft of the proposed new job description (attachment B) to the hrhelpdesk@partnershiphp.org.
2. All requests will be reviewed and compared to job descriptions in the PHC Job Library.
 - a. If another job description is determined to be similar, the request will be returned to the requestor with recommendation to use an existing job description in the PHC Job Library. In some situations, the recommendation may include consolidation of the two similar job descriptions to fulfill the needs of both departments. In these cases, both the department with the existing job description and the requestor will receive an email instructing them to work together on revising the job description to fit the needs of all parties.
 - b. If the request is for a truly unique job description not found in the PHC Job Library, the request and draft of the proposed job description will be sent through the approval workflow.
 - 1) The Senior Director of Human Resources reviews the job description to ensure it does not contain any biased language within the position title, position summary, essential duties, minimum education, skills qualifications and experience requirements. This includes removal of language that infers race or ethnicity; supports persons with disabilities (e.g., avoid sentences like “able to walk around facility” and replace with able to move around facility”); does not use words or slang that reflect ageism (e.g., young or “tech savvy”); and should be gender neutral (e.g., inclusive and gender-neutral pronouns will be used throughout the job description).
 - 2) Upon review of the proposed job description and request form, the Chief Executive Officer (CEO) and, if applicable, the Chief Operating Officer (COO) reviews and approves with a signature on the job description as well as the request form.
 - 3) Upon denial, the request will be returned to the department head with reason for denial.
3. Approved requests will be assessed for grade assignment using our Market Analysis tool.
4. Once the job description is graded, it will be added to the Wage & Grade Table and PHC Job Library.
5. The requestor and department head will receive notification that the job description has been approved and is available in the PHC Job Library.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

Policy/Procedure Number: HR213		Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 05/11/2015		Next Review Date: 01/01/202302/26/2025 Last Review Date: 05/19/202202/26/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Department Directors/Managers, CEO, COO, Senior Director of Human Resources, HR Administrative Specialist

X. REVISION DATES:
3/23/2018, 05/16/2019, 05/08/2020, 6/23/2021, 05/19/2022, 02/02/2023, 02/26/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY/ PROCEDURE

Policy/Procedure Number: HR213			Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 05/11/2015		Next Review Date: 02/26/2025 Last Review Date: 02/26/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 02/27/2024	

I. RELATED POLICIES:

A. N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. Market: The salary that is determined (based on market conditions) by looking at similar positions within the same industry and geographical location. Market 50th may not align with the Wage & Grade table midpoint but will always be within range of the grade.

IV. ATTACHMENTS:

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Policy/Procedure Number: HR213		Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
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 - a. If another job description is determined to be similar, the request will be returned to the requestor with recommendation to use an existing job description in the PHC Job Library. In some situations, the recommendation may include consolidation of the two similar job descriptions to fulfill the needs of both departments. In these cases, both the department with the existing job description and the requestor will receive an email instructing them to work together on revising the job description to fit the needs of all parties.
 - b. If the request is for a truly unique job description not found in the PHC Job Library, the request and draft of the proposed job description will be sent through the approval workflow.
 - 1) The Senior Director of Human Resources reviews the job description to ensure it does not contain any biased language within the position title, position summary, essential duties, minimum education, skills qualifications and experience requirements. This includes removal of language that infers race or ethnicity; supports persons with disabilities (e.g., avoid sentences like “able to walk around facility” and replace with able to move around facility”); does not use words or slang that reflect ageism (e.g., young or “tech savvy”); and should be gender neutral (e.g., inclusive and gender-neutral pronouns will be used throughout the job description).
 - 2) Upon review of the proposed job description and request form, the Chief Executive Officer (CEO) and, if applicable, the Chief Operating Officer (COO) reviews and approves with a signature on the job description as well as the request form.
 - 3) Upon denial, the request will be returned to the department head with reason for denial.
3. Approved requests will be assessed for grade assignment using our Market Analysis tool.
4. Once the job description is graded, it will be added to the Wage & Grade Table and PHC Job Library.
5. The requestor and department head will receive notification that the job description has been approved and is available in the PHC Job Library.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

Policy/Procedure Number: HR213		Lead Department: Human Resources	
Policy/Procedure Title: Job Descriptions		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 05/11/2015		Next Review Date: 02/26/2025 Last Review Date: 02/26/2024	
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A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Department Directors/Managers, CEO, COO, Senior Director of Human Resources, HR Administrative Specialist

X. REVISION DATES:
3/23/2018, 05/16/2019, 05/08/2020, 6/23/2021, 05/19/2022, 02/02/2023, 02/26/2024

PREVIOUSLY APPLIED TO:
N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR504			Lead Department: Human Resources	
Policy/Procedure Title: Overtime <u>Overtime and Shift Differentials</u>			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 01/01/2024 <u>02/18/2025</u> Last Review Date: 01/01/2023 <u>02/18/2024</u>		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney <u>Sonja Bjork</u>			Approval Date: 03/23/2018 <u>03/23/2018</u>	

I. RELATED POLICIES:

A. ~~HR501~~ N/A

II. IMPACTED DEPTS:

A. All Departments
~~A. Administration~~
~~B. Claims~~
~~C. Finance~~
~~D. Health Services~~
~~E. Human Resources~~
~~F. Information Technology~~
~~G. Member Services~~
~~H.B. Provider Relations~~

III. DEFINITIONS: N/A

~~I.A. Shift Differential: A premium pay rate for hours worked at untraditional times.~~

~~III.~~ **IV. ATTACHMENTS:** N/A

~~IV.V.~~ **V. PURPOSE:**

~~To provide Directors/Managers/Supervisors with appropriate guidelines for overtime scheduling.~~ To provide Directors/Managers/Supervisors with appropriate guidelines for overtime scheduling and shift differentials.

~~V.VI.~~ **VI. POLICY / PROCEDURE:**

A. Overtime

1. When operating requirements or other needs cannot be met during regular working hours, employees may be scheduled to work overtime hours. Notification will be given as far in advance as possible. All overtime worked must be approved in advance by your supervisor. Department Directors/Managers must have prior approval from the ~~Executive Director~~ Chief Executive Officer (CEO) for all overtime. Overtime assignments will be distributed as equitably as practical to all employees qualified to perform the required work.
2. Overtime compensation is paid to all non-exempt employees in accordance with federal wage and hour requirements. As required by law, overtime pay is based on actual hours worked. Time off for PTO, CL (if applicable), holiday, or any leave of absence will not be considered hours worked for purposes of performing overtime calculations.
3. Overtime is paid to non-exempt employees for hours worked in excess of forty (40) hours in a week

Policy/Procedure Number: HR504		Lead Department: Human Resources	
Policy/Procedure Title: OvertimeOvertime and Shift Differentials		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 01/01/2024 02/18/2025 Last Review Date: 01/01/2023 02/18/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

(Sunday through Saturday). The workweek begins each Sunday at 12:01 A.M. Partnership HealthPlan of California's (~~PHC~~Partnership) window for beginning a workday and ending a workday is three (3) minutes. (~~See Timekeeping—Non Exempt Policy, HR501~~).

B. Shift Differential

1. An employee whose regularly assigned work schedule begins at or before 4:00am is eligible for a 5% shift differential.
 - a. Shift differential is only available for positions that have been determined eligible by Human Resources and the CEO.
2. Shift differential is based on a regularly assigned schedule and not for occasionally filling in or covering an eligible shift.
3. If an employee's regularly assigned schedule includes some days that qualify as eligible and other days that do not, the employee will only receive the shift differential for the eligible days.
 - a. Example: Assigned schedule is Monday/Tuesday, 8:00am-4:30pm, and Wednesday/Thursday/Friday, 4:00am-12:30pm, the employee will only receive the shift differential for Wednesday/Thursday/Friday.
4. Shift differential is based on hours worked. PTO/PSL/Spot Bonus Hours will be paid at regular rate.
5. Employees who work alternative work schedules (ex: 9/80, 4/10) are not eligible to receive shift differential.
- 3-6. If an employee does not clock in within 10 minutes of their start time, they will not receive the shift differential.

~~VI.VII.~~ **REFERENCES:** N/A

~~VII.VIII.~~ **DISTRIBUTION:**

A. PowerDMS

~~VIII.IX.~~ **POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:** All Employees, Directors, Managers, Supervisors

~~IX.X.~~ **REVISION DATES:**

01/28/2005, 04/20/2012, 03/28/2013, 3/23/2018, 02/18/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR504			Lead Department: Human Resources	
Policy/Procedure Title: Overtime and Shift Differentials			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 02/18/2025 Last Review Date: 02/18/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 02/19/2024	

I. RELATED POLICIES:

A. N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. Shift Differential: A premium pay rate for hours worked at untraditional times.

IV. ATTACHMENTS: N/A

V. PURPOSE:

To provide Directors/Managers/Supervisors with appropriate guidelines for overtime scheduling and shift differentials.

VI. POLICY / PROCEDURE:

A. Overtime

1. When operating requirements or other needs cannot be met during regular working hours, employees may be scheduled to work overtime hours. Notification will be given as far in advance as possible. All overtime worked must be approved in advance by your supervisor. Department Directors/Managers must have prior approval from the Chief Executive Officer (CEO) for all overtime. Overtime assignments will be distributed as equitably as practical to all employees qualified to perform the required work.
2. Overtime compensation is paid to all non-exempt employees in accordance with federal wage and hour requirements. As required by law, overtime pay is based on actual hours worked. Time off for PTO, CL (if applicable), holiday, or any leave of absence will not be considered hours worked for purposes of performing overtime calculations.
3. Overtime is paid to non-exempt employees for hours worked in excess of forty (40) hours in a week (Sunday through Saturday). The workweek begins each Sunday at 12:01 A.M. Partnership HealthPlan of California's (Partnership) window for beginning a workday and ending a workday is three (3) minutes.

B. Shift Differential

1. An employee whose regularly assigned work schedule begins at or before 4:00am is eligible for a 5% shift differential.
 - a. Shift differential is only available for positions that have been determined eligible by Human Resources and the CEO.

Policy/Procedure Number: HR504		Lead Department: Human Resources	
Policy/Procedure Title: Overtime and Shift Differentials		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 02/18/2025 Last Review Date: 02/18/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

2. Shift differential is based on a regularly assigned schedule and not for occasionally filling in or covering an eligible shift.
3. If an employee's regularly assigned schedule includes some days that qualify as eligible and other days that do not, the employee will only receive the shift differential for the eligible days.
 - a. Example: Assigned schedule is Monday/Tuesday, 8:00am-4:30pm, and Wednesday/Thursday/Friday, 4:00am-12:30pm, the employee will only receive the shift differential for Wednesday/Thursday/Friday.
4. Shift differential is based on hours worked. PTO/PSL/Spot Bonus Hours will be paid at regular rate.
5. Employees who work alternative work schedules (ex: 9/80, 4/10) are not eligible to receive shift differential.
6. If an employee does not clock in within 10 minutes of their start time, they will not receive the shift differential.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: All Employees, Directors, Managers, Supervisors

X. REVISION DATES:
01/28/2005, 04/20/2012, 03/28/2013, 3/23/2018, 02/18/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR506			Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 01/01/2024 02/14/2025 Last Review Date: 07/27/2023 02/14/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney <i>Sonja Bjork</i>			Approval Date: 06/21/2023	

I. RELATED POLICIES:

- A. [HR514](#)
- B. [HR512](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. **Conferences:** Off-site educational and/or business events. This term will be used to describe all off-site conferences, meetings, committees, workshops, seminars, and trainings. This will also cover any meeting, seminar, training, etc. that requires a registration fee.
- B. **Business Meetings:** Approved attendance at various work groups, committees, or other meetings where attendee is representing Partnership HealthPlan of California Partnership in an official capacity. Typically does not require a registration fee.
- C. **Department Head:** The employee responsible for their department budget and ultimately accountable for the overall success of their department. For further explanation, see policy HR514 for leveling criteria.
- D. **Major Conference:** Conference in which the total cost (registration fee, travel, lodging, etc.) is greater than \$1,500.00, out-of-state, and/or longer than three (3) days.

IV. ATTACHMENTS:

- A. Education & Travel Inquiry/Request Form
- B. Education & Travel Inquiry/Request Form Instructions
- C. Tuition/Certification Program Approval Form
- D. Tuition/Certification Reimbursement Workflow Reference Guide
- ~~E.~~ [Licensure Renewal & Membership Dues Approval Form](#)
- ~~F.~~ Concur Training (LMS)
- ~~G.~~ Concur Expense Reimbursement Reminders
- ~~H.~~ Conference Summary Report

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 01/01/2024 02/14/2025 Last Review Date: 06/21/2023 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- ~~I~~H. Certification Reimbursement Report Guide_Concur
- ~~J~~H. License Renewal Reimbursement Report Guide_Concur
- ~~K~~J. Membership Dues Reimbursement Report Guide_Concur
- ~~L~~K. Tuition Reimbursement Repot Guide_Concur

V. PURPOSE:

The following policy will provide staff with the appropriate guiding principles regarding the process for payment or reimbursement of conferences, tuition, continuing education, and travel as approved per policy HR514 or HR512.

VI. POLICY / PROCEDURE:

A. Steps for Reimbursements and Expenses for Education/Travel Requests

1. Take the LMS Concur training – *Concur Expense Management for Users*
2. Request login credentials from the Concur Help Desk (Concurhelpdesk@partnershiphp.org).
3. Receipts and Substantiating Documentation

All employees must complete an Expense Reimbursement Request through Concur with substantiating documentation attached (i.e. parking, lodging, airline, credit card, gas receipts, etc.) and the appropriate signatures before submitting to Finance. The approved [Education & Travel Inquiry/Request Form](#) ~~Education & Travel Form~~ must be included with submission.

- a. Entertainment expenses are not reimbursable.
- b. Without receipt and an approved justification for the expense, the employee will not receive reimbursement.
- c. In the absence of credit card receipts or other proof of actual expenditure, Partnership will reimburse lodging expenses only if marked “paid” by the management of the lodging facility.
4. Mileage
 - a. All employees will be reimbursed for use of personal cars for Partnership business at the current IRS mileage rate. Commuting costs between an employee’s home during the normal calendar week and Partnership office is not reimbursable.
 - b. If the employee is traveling to a conference or airport for company business and the employee leaves from work or home, deduct the usual mileage from work to home and record any remaining mileage to the conference or airport.
 - c. All employees must use the mileage app in Concur to calculate mileage.
5. Meals
 - a. Per Diem Meals: For out-of-town overnight travel, meals will be reimbursed at a rate not to exceed \$60.00 per day. Receipts are not required.
 - b. Day Trip Lunch: For one day out-of-town business trips that are not part of the employee’s main job description or day-to-day responsibilities, a meal will be reimbursed at a rate not to exceed \$15.00 for lunch only. The mileage traveled must be at least one hundred (100) miles round-trip. Receipts are not required. Day trip meal reimbursement will be taxed according to the employee’s regular withholding status. Reimbursement amounts will be reported to Payroll for this purpose.
 - c. Business Meals: These are meals that include the employee plus attendees of the meal. In Concur, all attendees must be entered into the line entry, and receipts ARE REQUIRED.
 - d. For travel outside of California, IRS per diem rates can be paid, however, receipts must be submitted.
 - e. Reimbursement will not be approved if meals are included in the conference and/or business meeting.
 - f. Alcoholic beverages are not reimbursable.
6. Miscellaneous

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: <u>01/01/2024</u> <u>02/14/2025</u> Last Review Date: <u>06/21/2023</u> <u>02/14/2024</u>	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- a. External vendors and board members must follow the same guidelines as for employees. All authorized travel expenses, frequency of reimbursement, and invoice requirements must be specified in the vendor contract.
 - b. Training hours will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations. Employees should record conference hours attended on their timecard by selecting the ADP pay code: "Education Conference."
 - c. Human Resources (HR) reserves the right to verify attendance of all conferences. Staff who register for a conference but don't attend will not be reimbursed and/or will face possible disciplinary action, up to and including termination.
 - d. AP has two (2) weeks to process an approved Concur request from the final approval date. For example, if an expense reimbursement request has to be sent back to the employee for correction, or a request has been made for additional details or signatures needed, the date that the revised form is received correctly completed is the date that is used as the new submission date into Finance. All corrections will require approval before being finalized by Finance.
 - e. All expenses must be submitted within the fiscal year of travel or sixty (60) days, whichever is greater.
7. Grant monies will be used for travel if the grant requires collaborative meetings.

B. Reimbursement for Continuing Education and Certifications

1. Tuition and/or Certifications

Employee must be on payroll at the time of the course completion in order to receive reimbursement. Partnership will reimburse 75% of employee paid expenses up to \$4,000.00 per calendar year, not to exceed IRS limit (total reimbursement applies to combined tuition and certification). The reimbursement amount per calendar year does not apply to when the course/classes are taken but instead the factor is when approval of all submitted documents is processed and payment is issued by Partnership. Failure to provide required documentation may result in delays in the reimbursement process.

- a. Employee must receive a grade "C" or better in class or a "pass" in a pass/fail course.
 - b. In most cases, the employee is reimbursed per approved and completed course. However, if the accredited educational institution charges a flat rate fee for the semester or quarter, without regard of how many classes are taken, the employee will receive reimbursement prorated based on classes passed versus enrolled. For instance, if an employee takes five (5) classes in a semester and only passes four (4) of the five (5), the employee will only be able to submit 80% of the total tuition cost for 75% reimbursement.
 - c. Employee must submit tuition/certification reimbursement requests to Training & Development (T&D) no later than December 15 to ensure reimbursements will be applied to that calendar year. Any reimbursements received after December 15 will be applied to the year of receipt by AP.
 - 1) In these circumstances, unofficial grades are acceptable as an interim until official transcripts are available. Official transcripts must be turned in immediately upon receipt, otherwise future requests can be denied and/or employee may be required to reimburse Partnership for tuition reimbursements received.
 - 2) Except in the case of extenuating circumstances, reimbursement requests will not be accepted after six (6) months from completion of course.
 - d. Education assistance benefits do not include payments for the following items: meals, lodging, transportation, tools, or supplies (other than textbooks) that the employee can keep after completing the course of instruction (reference IRS Publication 970).
- 2. Licensure Renewals and Membership Dues**
- a. Full and part-time employees may be reimbursed for 100% of licensure renewals and membership dues if they hold a position which requires a license or membership as stated in the employee's job description or offer letter.

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 01/01/2024 <u>02/14/2025</u> Last Review Date: 06/21/2023 <u>02/14/2024</u>	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- b. Employee must complete a Licensure Renewal & Membership Dues Approval Form (attachment ~~EB~~) and obtain their director/manager's signature. Form must be turned into HR for further processing. Form must include the following:
 - 1) Copy of license or membership to remain in employee personnel file
 - 2) Receipt of payment
 - c. Continuing education will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations.
3. If an employee voluntarily separates employment within six (6) months after receiving reimbursement, Partnership may require a refund of all continuing education, certification, licensure renewals, and/or membership dues at a prorated amount based on the time of separation.
4. All Tuition, Certification, License Renewals, and Membership Dues reimbursement must first be submitted to the HR Department for review and approval and then the employee must submit into Concur for reimbursement.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: All Employees, Directors, Managers, Human Resources, Finance

X. REVISION DATES:

03/28/2005, 01/11/2007, 08/15/2007, 01/09/2014, 01/16/2015, 9/7/2018, 06/01/2020, 07/27/2023, 08/16/2023, ~~1/31/24~~ 02/14/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR506			Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 02/14/2025 Last Review Date: 02/14/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 02/23/2024	

I. RELATED POLICIES:

- A. [HR512](#)
- B. [HR514](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. **Conferences:** Off-site educational and/or business events. This term will be used to describe all off-site conferences, meetings, committees, workshops, seminars, and trainings. This will also cover any meeting, seminar, training, etc. that requires a registration fee.
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- D. **Major Conference:** Conference in which the total cost (registration fee, travel, lodging, etc.) is greater than \$1,500.00, out-of-state, and/or longer than three (3) days.

IV. ATTACHMENTS:

- A. [Education & Travel Inquiry/Request Form](#)
- B. [Education & Travel Inquiry/Request Form Instructions](#)
- C. [Tuition/Certification Program Approval Form](#)
- D. [Tuition/Certification Reimbursement Workflow Reference Guide](#)
- E. [Licensure Renewal & Membership Dues Approval Form](#)
- F. [Concur Training \(LMS\)](#)
- G. [Concur Expense Reimbursement Reminders](#)
- H. [Conference Summary Report](#)
- I. [Certification Reimbursement Report Guide \(Concur\)](#)

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 02/14/2025 Last Review Date: 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- J. [License Renewal Reimbursement Report Guide \(Concur\)](#)
- K. [Membership Dues Reimbursement Report Guide \(Concur\)](#)
- L. [Tuition Reimbursement Repot Guide \(Concur\)](#)

V. PURPOSE:

The following policy will provide staff with the appropriate guiding principles regarding the process for payment or reimbursement of conferences, tuition, continuing education, and travel as approved per policy HR514 or HR512.

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 - d. For travel outside of California, IRS per diem rates can be paid, however, receipts must be submitted.
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 - f. Alcoholic beverages are not reimbursable.
6. Miscellaneous
 - a. External vendors and board members must follow the same guidelines as for employees. All authorized travel expenses, frequency of reimbursement, and invoice requirements must be specified in the vendor contract.

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 02/14/2025 Last Review Date: 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- b. Training hours will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations. Employees should record conference hours attended on their timecard by selecting the ADP pay code: "Education Conference."
 - c. Human Resources (HR) reserves the right to verify attendance of all conferences. Staff who register for a conference but don't attend will not be reimbursed and/or will face possible disciplinary action, up to and including termination.
 - d. AP has two (2) weeks to process an approved Concur request from the final approval date. For example, if an expense reimbursement request has to be sent back to the employee for correction, or a request has been made for additional details or signatures needed, the date that the revised form is received correctly completed is the date that is used as the new submission date into Finance. All corrections will require approval before being finalized by Finance.
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1. Tuition and/or Certifications

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- a. Employee must receive a grade "C" or better in class or a "pass" in a pass/fail course.
- b. In most cases, the employee is reimbursed per approved and completed course. However, if the accredited educational institution charges a flat rate fee for the semester or quarter, without regard of how many classes are taken, the employee will receive reimbursement prorated based on classes passed versus enrolled. For instance, if an employee takes five (5) classes in a semester and only passes four (4) of the five (5), the employee will only be able to submit 80% of the total tuition cost for 75% reimbursement.
- c. Employee must submit tuition/certification reimbursement requests to Training & Development (T&D) no later than December 15 to ensure reimbursements will be applied to that calendar year. Any reimbursements received after December 15 will be applied to the year of receipt by AP.
 - 1) In these circumstances, unofficial grades are acceptable as an interim until official transcripts are available. Official transcripts must be turned in immediately upon receipt, otherwise future requests can be denied and/or employee may be required to reimburse Partnership for tuition reimbursements received.
 - 2) Except in the case of extenuating circumstances, reimbursement requests will not be accepted after six (6) months from completion of course.
- d. Education assistance benefits do not include payments for the following items: meals, lodging, transportation, tools, or supplies (other than textbooks) that the employee can keep after completing the course of instruction (reference IRS Publication 970).

2. Licensure Renewals and Membership Dues

- a. Full and part-time employees may be reimbursed for 100% of licensure renewals and membership dues if they hold a position which requires a license or membership as stated in the employee's job description or offer letter.
- b. Employee must complete a Licensure Renewal & Membership Dues Approval Form (attachment E) and obtain their director/manager's signature. Form must be turned into HR for further processing. Form must include the following:
 - 1) Copy of license or membership to remain in employee personnel file

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 04/17/1995		Next Review Date: 02/14/2025 Last Review Date: 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- 2) Receipt of payment
- c. Continuing education will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations.
3. If an employee voluntarily separates employment within six (6) months after receiving reimbursement, Partnership may require a refund of all continuing education, certification, licensure renewals, and/or membership dues at a prorated amount based on the time of separation.
4. All Tuition, Certification, License Renewals, and Membership Dues reimbursement must first be submitted to the HR Department for review and approval and then the employee must submit into Concur for reimbursement.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: All Employees, Directors, Managers, Human Resources, Finance

X. REVISION DATES:

03/28/2005, 01/11/2007, 08/15/2007, 01/09/2014, 01/16/2015, 9/7/2018, 06/01/2020, 07/27/2023, 08/16/2023, 02/14/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR509			Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards and Compensation			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2004		Next Review Date: 01/01/2025 ⁵⁴ Last Review Date: 01/01/2024 ⁴³		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: <u>Sonja BjorkLiz Gibboney</u>			Approval Date: 1/7/2021	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:

A. All departments

III. DEFINITIONS: Member Facing Department: Member Services, Utilization Management, Population Health, Care Coordination, Grievance, and Transportation.

IV. ATTACHMENTS: N/A

V. PURPOSE:

To provide guidelines and procedures for Partnership HealthPlan of California's (PartnershipHC) Bilingual Standards and Compensation Program.

VI. POLICY / PROCEDURE:

A. Procedures for Administration of Bilingual Examination Process

1. An employee from a Member facing department or other PartnershipHC department, whose position responsibilities require regular and frequent use of bilingual skills will be tested as outlined below:
 - a. Following the selection of the final candidate for the position, the Human Resources (HR) Department will schedule the pre-employment bilingual examination through the approved vendor.
 - b. HR will retrieve the exam results from the vendor and notify the hiring Department Director of the outcome of the exam. The bilingual Exam certification shall be maintained in the candidate's personnel file. This certification certifies the candidate's ability to converse in the second language.
 - c. The exam rating PHC will consider as passing is Advanced Low or higher.
 - d. Upon successful completion of the exam, HR will notify the hiring department to coordinate a job offer. HR will contact the potential candidate to offer the position.
 - e. Upon unsuccessful completion of the exam, HR will notify the hiring Department Director and inform the potential candidate that ~~based on exam results~~ they did not pass the bilingual exam and the position is not being offered.
 - f. HR will coordinate with the hiring department prior to making a second selection from the pool of qualified candidates. The pre- exam procedure will be repeated.

B. Re-Testing

1. Candidates who fail the bilingual examination may apply immediately for another position that does not require bilingual skills or re-apply and re-test for a bilingual position after a six (6) month

Policy/Procedure Number: HR509		Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2004		Next Review Date: 01/01/2024 Last Review Date: 01/01/2023	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

period.

C. Re-Certification for Existing Employees

1. Employees working in a position that requires regular and frequent use of bilingual language skills will be issued the bilingual examination at least once annually for recertification.
2. HR will notify the employee and the department director the month before their hire date anniversary to schedule the exam recertification.
3. Exam results will be shared with the employee, department director and saved in the employees personnel file/learning management profile.

D. Bilingual Compensation:

1. An employee whose position responsibilities require regular and frequent use of bilingual language skills is eligible for a bilingual pay differential.
2. PHC shall provide a bilingual payment of \$~~40~~100.00 per pay period where the position is designated as requiring skills, after successfully passing the bilingual skills exam.
- ~~3. PHC shall provide a bilingual payment of \$55.00 per pay period for the Certified Trainer.~~
- 4.3. No bilingual payments will be made for employees on Leave of Absence (LOA). Employees who are absent for the entire pay period for any reason, without using accrued time off balances, are not eligible for bilingual pay. If an employee works a portion of the pay period or if any PTO/PSL is applied they remain eligible for bilingual pay.

VII. REFERENCES:

- A. Cultural & Linguistic Program Description

VIII. DISTRIBUTION:

- A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 10/25/2007, 03/28/2013, 06/01/2018, 12/04/2020

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR509			Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards and Compensation			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2004		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 02/16/2024	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
A. All departments

III. DEFINITIONS: Member Facing Department: Member Services, Utilization Management, Population Health, Care Coordination, Grievance, and Transportation.

IV. ATTACHMENTS: N/A

V. PURPOSE:
To provide guidelines and procedures for Partnership HealthPlan of California's (Partnership) Bilingual Standards and Compensation Program.

VI. POLICY / PROCEDURE:

A. Procedures for Administration of Bilingual Examination Process

1. An employee from a Member facing department or other Partnership department, whose position responsibilities require regular and frequent use of bilingual skills will be tested as outlined below:
 - a. Following the selection of the final candidate for the position, the Human Resources (HR) Department will schedule the pre-employment bilingual examination through the approved vendor.
 - b. HR will retrieve the exam results from the vendor and notify the hiring Department Director of the outcome of the exam. The bilingual Exam certification shall be maintained in the candidate's personnel file. This certification certifies the candidate's ability to converse in the second language.
 - c. The exam rating Partnership will consider as passing is Advanced Low or higher.
 - d. Upon successful completion of the exam, HR will notify the hiring department to coordinate a job offer. HR will contact the potential candidate to offer the position.
 - e. Upon unsuccessful completion of the exam, HR will notify the hiring Department Director and inform the potential candidate that they did not pass the bilingual exam and the position is not being offered.
 - f. HR will coordinate with the hiring department prior to making a second selection from the pool of qualified candidates. The pre- exam procedure will be repeated.

B. Re-Testing

1. Candidates who fail the bilingual examination may apply immediately for another position that does not require bilingual skills or re-apply and re-test for a bilingual position after a six (6) month

Policy/Procedure Number: HR509		Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2004		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

period.

C. Re-Certification for Existing Employees

1. Employees working in a position that requires regular and frequent use of bilingual language skills will be issued the bilingual examination at least once annually for recertification.
2. HR will notify the employee and the department director the month before their hire date anniversary to schedule the exam recertification.
3. Exam results will be shared with the employee, department director and saved in the employee's personnel file.

D. Bilingual Compensation:

1. An employee whose position responsibilities require regular and frequent use of bilingual language skills is eligible for a bilingual pay differential.
2. Partnership shall provide a bilingual payment of \$100.00 per pay period where the position is designated as requiring skills, after successfully passing the bilingual skills exam.
3. Employees who are absent for the entire pay period for any reason, without using accrued time off balances, are not eligible for bilingual pay. If an employee works a portion of the pay period or if any PTO/PSL is applied they remain eligible for bilingual pay.

VII. REFERENCES:

- A. Cultural & Linguistic Program Description

VIII. DISTRIBUTION:

- A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 10/25/2007, 03/28/2013, 06/01/2018, 12/04/2020, 02/16/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR511			Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality			<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
Original Date: 06/26/2009		Next Review Date: 11/28/2024 03/07/2025 Last Review Date: 11/28/2023 03/07/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input checked="" type="checkbox"/> OPERATIONS	<input checked="" type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 11/28/2023	

I. RELATED POLICIES:

- A. [HR703](#)
- B. [HR710](#)
- ~~B.C.~~ [HR712](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. Occurrence: Unscheduled time off. Examples of an Occurrence include:
 1. Absence (3 points): Employee does not work the scheduled shift without prior approval. (Consecutive workday absences will count as one occurrence/3 points).
 2. Early Out: Employee leaves work prior to the end of the scheduled shift without scheduling in advance as required by this policy.
 - a. If an employee leaves early and completes half or more of their scheduled shift, the Early Out will be counted as 1 point
 - b. If an employee leaves early and completes less than half of their scheduled shift, the Early Out will be counted as 3 points
 3. Tardy: Employee is not present and ready to work (non-exempt employees must be clocked in to ADP) by 3 minutes after the shift start time without scheduling in advance as required by this policy. Employees whose jobs require them to be logged into a department's phone queue must be logged into the phone and available to take calls at the start of the shift.
 - a. If an employee is late and completes half or more of their scheduled shift, the Tardy will be counted as 1 point
 - b. If an employee is late and completes less than half of their scheduled shift, the Tardy will be counted as 3 points
 4. Partial Time-Off: Employee leaves for a portion of the day without scheduling in advance as required by this policy (other than an Early Out)
 - a. If an employee leaves for a portion of the day and completes half or more of their scheduled shift, the Partial Time-Off will be counted as 1 point
 - b. If an employee leaves for a portion of the day and completes less than half of their scheduled shift, the Partial Time-Off will be counted as 3 points
- B. Leave without Pay (LWOP): Time off that is not paid and not otherwise protected by law.
- C. Protected Leave of Absence: Time off that is covered under authorized state or federal Leave of Absence, or time off that is considered a reasonable accommodation under any authorized state or

Policy/Procedure Number: HR511		Lead Department: Human Resources	
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Original Date: 06/26/2009		Next Review Date: 11/28/2024 03/07/2025 Last Review Date: 11/28/2023 03/07/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

federal statute.

- D. No Call, No Show: An employee is absent without notification to their direct report, or their department's attendance line, within two hours after their start time unless circumstances beyond their control have prevented them from notifying in which case, will be handled on a case by case basis. The employee will be considered to have voluntarily resigned their employment at Partnership and will not be eligible for rehire or reinstatement. Exceptions to this procedure may be made if it is determined by Partnership that the employee's absence were due to extenuating circumstances beyond the employee's control, and which prohibited timely notification of the absence.
- E. Flex Schedule: A schedule that offers a range of start times and meal periods. Non-Exempt employees who are enrolled in a 9/80 schedule are not eligible to participate in a Flex schedule.

IV. ATTACHMENTS:

- A. [Acknowledgement of Receipt](#)
- B. [Attendance and Punctuality FAQs](#)

V. PURPOSE:

Partnership's Attendance Policy is designed to maximize operational effectiveness through attendance and punctuality. The information included in this policy will further develop attendance standards for all employees of Partnership. Attendance and punctuality standards are established to ensure equitable, efficient operations and individual accountability.

This Attendance Policy applies to all employees of Partnership. The policy includes expectations for employees, Supervisors, and Managers relating to employee attendance, definitions, and attendance requirements.

VI. POLICY / PROCEDURE:

Partnership expects employees to report to work on a reliable and punctual basis. Absenteeism, early departures from work, and late arrivals burden your fellow employees and Partnership. Regular attendance and punctuality are essential functions of each employee's job.

Employees are expected to report to work as scheduled, on time. Employees also are expected to remain in designated areas on the work premises for their entire work schedule, except for rest or meal periods, when required to leave on authorized Partnership business, or when otherwise excused by their supervisor. Late arrival, early departure, or other unanticipated and unapproved absences from scheduled hours are disruptive, must be avoided, and may result in disciplinary action up to and including termination of employment.

Employees should consult their immediate Supervisor/Manager/Director for specific call-in instructions for their department. Every time an employee is absent or late, they must follow their supervisor's instructions for reporting the tardiness or absence. The employee must also inform their direct report of the expected duration of any absence. Partnership will comply with applicable laws relating to time off from work, but it is the employee's responsibility to provide sufficient information to enable Partnership to determine if the time off is covered by an applicable law. Employees must call-in personally unless extenuating circumstances do not allow doing so (example: a very serious car accident). In those cases, an immediate family member is allowed to report the employee's absence.

If an employee is absent for their own, or a family member's, illness or injury for three (3) days that were not previously scheduled, the employee will be required to submit a note from the treating health care provider (unless the [employee elects to utilize their available absence is covered by California Mandatory Paid Sick](#)

Policy/Procedure Number: HR511		Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality		<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
Original Date: 06/26/2009	Next Review Date: 11/28/2024 03/07/2025 Last Review Date: 11/28/2023 03/07/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

Leave (PSL)). If an employee fails to acquire and submit a provider's note before or upon their return, they will be sent home to obtain a note. Providing a health care provider's note does not preclude the employee from an occurrence, as described below.

-Fairfield and Santa Rosa Employees can submit a health care provider's note via secured fax (707) 863-4399, email (HRhelpDesk@partnershiphp.org), physical delivery to Partnership in-person or by employee's designee. Failure to do so may result in corrective action including termination.

-Redding and Eureka Employees can submit a health care provider's note via secured fax (530) 351-9042, email (HRHelpDesk@partnershiphp.org), physical delivery to Partnership in-person or by employee's designee. Failure to do so may result in corrective action including termination.

In requesting this health care provider's note, Partnership complies with the provisions of the Genetic Information Nondiscrimination Act of 2008 (GINA), which prohibits employers from requesting or requiring genetic information of an employee or family member of the employee, except as specifically allowed by this law. To comply with GINA, Partnership asks that employees not provide any genetic information when responding to this request for medical information. Please see the Requests for Medical Certification policy in the Employee Handbook for more information.

If an employee is absent for their own, or a family member's, illness or injury for five (5) consecutive days that were not previously scheduled, the employee should contact HR to discuss Leave of Absence (LOA) options [\(unless the employee elects to utilize their available Paid Sick Leave \(PSL\)\)](#). Management should also advise HR of any possible LOA situations.

Excessive absenteeism may lead to disciplinary action, up to and including termination of employment. Absences may be excessive if they occur frequently or if they show a pattern. Absences immediately before or after holidays and weekends are suspect. Continuing patterns of absences, early departures, tardies, or unexcused exception reports, regardless of the exact number of days, may also result in disciplinary action, up to and including termination of employment.

Individuals with disabilities may be granted reasonable accommodation in complying with these policies.

A. Expectations

1. Each employee is expected to be present and ready to work on time, and non-exempt employees must also clock in on time. For positions required to sign on to phones, the employee must be logged into their phone and ready to take calls at the start of their shift. The employee must remain signed onto the phone and work until the conclusion of the shift, and, if applicable, all of the calls in the queue are answered. Leadership will adjust break and meal periods accordingly. Employees not required to sign on to the phone must leave and return from break/meal periods at the scheduled time. Employees must also notify Supervisor(s) when there is a scheduling or coverage gap.
2. Unless otherwise required by law, the following rules apply to requesting paid time off (PTO). One weeks' notice is preferable when requesting time off. Department leadership can decide to accommodate a request that is submitted within a week if they determine that department needs can still be met.
3. Employees are responsible for understanding that unless expressly approved by their department head, non-exempt employees should never have a punch source from any mobile device. Violation may be considered as timecard fraud that is subject to appropriate disciplinary action, up to and including termination.
4. Employees must submit an Exception Report, signed by their supervisor, to

Policy/Procedure Number: HR511		Lead Department: Human Resources	
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Payrollhelpdesk@partnershiphp.org to account for a missed time card punch, an employee who demonstrates patterns of use will be subject to appropriate disciplinary action up to and including termination. A Corrective Action Plan (CAP) may be used to document these issues and outline an improvement plan.

5. Partnership recognizes employees will, at times, be absent from work and that, occasionally, unforeseen circumstances will cause employees to be late for work. Employees are expected to report absences to their direct Supervisor/Manager/Director, or to their department's attendance line before the start of their scheduled work shift as set forth above.
 6. Occurrence points issued pursuant to this Attendance Policy are maintained for a rolling 12-month calendar period for each employee. Managers and Supervisors track and trend attendance, attendance patterns and address concerns with staff as needed.
 7. Employees who are expressly offered a Flex Schedule by their department leadership are required to manage their start time, meal period, rest periods, and end time responsibly. Employees utilizing a Flex Schedule are required to adhere to their assigned work hours and meal periods. Flex schedules may be revoked by department leadership at any time.
 8. Employees who utilize the 9/80 schedule must adhere to the meal periods agreed upon in the 9/80 Schedule Agreement. Not adhering to meal periods will be considered an abuse of the 9/80 agreement, and is subject to appropriate disciplinary action, up to and including termination.
 9. An employee will not be allowed to use the time off code for Leave Without Pay (LWOP) if the employee has PTO hours available in their PTO bank, unless otherwise permitted by law. If an employee does not have PTO accrued for time off not covered by a protected leave of absence, leadership may deny the time off request or not "advance" time off. If an employee uses LWOP to cover an absence, early out, tardy or partial time off, the time off will be counted as 3 points, rather than the point values described below.
 10. In the event of an employee's rehire within 12 months from his or her separation date, the rehired employee's attendance occurrences will be reinstated on a rolling 12-month calendar basis.
 11. With guidance from Human Resources, members of Department Leadership will be responsible for ensuring consistent compliance with, and administration of, this policy within their department.
- B. Occurrence Exceptions
1. Occurrence points for absences or tardiness will not be assessed against an employee under the following circumstances:
 - a. Authorized leaves of absence, including all legally required leaves of absence approved by Partnership, such as leave under the Family and Medical Leave (FMLA), the California Family Rights Act (CFRA), and/or Pregnancy Disability Leave (PDL).
 - b. Certain school-related matters (according to California Labor Code 230.8).
 - c. Necessary reasonable accommodation of a disability as defined by the Americans with Disabilities Act, Americans with Disabilities Act Amendments Act, and Fair Employment and Housing Act, provided such accommodation does not create an undue hardship to Partnership.
 - d. Military leave.
 - e. Use of ~~California Mandatory~~ Paid Sick Leave hours.
 - f. Jury duty, provided documentation is supplied as set forth in Partnership's Civic Duty Policy.
 - g. Court subpoenas, provided the employee notifies Partnership with as much advance notice as reasonably possible.
 - h. If an employee is directed by the Partnership to leave work early due to lack of work or by mutual agreement. For example, in circumstances such as when call volume is low or there is a power outage, inclement weather, etc., department leadership may decide that having a full staff in the office is not necessary. In these situations, leadership may offer to an employee the chance to leave work for the remainder of the day. If the employee accepts, they will be

Policy/Procedure Number: HR511		Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality		<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

instructed to clock out and will not receive compensation for hours not worked. The employee will have to make up the hours not worked with PTO. If the employee does not have enough PTO to cover the hours not worked, the difference in hours will be made up with Leave without Pay.

- i. Pre-approved modifications of an employee's work schedule. Documentation may be requested.
- j. Bereavement leave. Documentation may be requested.
- k. Authorized vacation.
- l. Holidays recognized by Partnership provided the employee is not scheduled to work on the holiday.
- m. Disciplinary suspension.
- n. Layoff.
- o. Any other protected leave in accordance with state and/or federal law.

C. Discipline for Occurrences

1. The following rating scale has been established to define attendance performance for staff.
 - a. The occurrences are measured on a rolling 12-month period, based on months worked.
 - b. Employees who fall below "full performance" may be subject to disciplinary action, up to and including termination.
 - c. Employees who demonstrate a pattern of inappropriate attendance may be subject to disciplinary action, up to and including termination, regardless of performance rating. Examples may include:
 - 1) Regularly calling in to report an absence on a Monday or a Friday.
 - 2) Calling in to report an absence on a day for which a prior leave or PTO request was denied.
 - 3) Continuous incidents of corrective action plans related to the attendance policy
 - d. Newly-hired employees are expected to maintain 4 or fewer points for the duration of their first 90 days of employment. Employees obtaining more than 4 points during the first 90 days may be subject to disciplinary action, up to and including termination. These cases may be reviewed on a case by case basis by management. New employees who join departments with previously-established and mandatory training will not be allowed to miss any time during training.
 - e. Of course, an employee may be subject to disciplinary action if their attendance is unsatisfactory, even if the employee has not accrued excessive points. Additionally, Partnership may consider an employee's attendance in conjunction with other factors, like performance and behavior. For example, if an employee's performance is poor, Partnership may consider that performance record in conjunction with their attendance in determining the appropriate performance rating or corrective action.

ATTENDANCE POINTS SCALE		
12 Months Rolling Total	Performance Rating	Corrective Action
0 – 6 points	Exceeds Performance	None
7 – 12 points	Full Performance	None

Policy/Procedure Number: HR511		Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality		<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
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13 – 18 points	Developing	At 13 points, a verbal warning will be issued. *At 15 points, a written warning will be issued. *At 17 points, a final warning will be issued. *Please use official CAP form (HR405-A) for written warnings
19 + points	Unsatisfactory / Needs Immediate Improvement	At 19 points or more, it is grounds for termination.

D. Enforcement

1. This Attendance Policy will be enforced in accordance with all applicable federal and state laws. Partnership will not consider, for disciplinary purposes, occurrences protected by such laws and does not intend to discipline any employee in contravention of such laws. If you believe you have been subjected to disciplinary action for a protected absence/occurrence under federal and/or state law, please bring it to the attention of a Director or Manager of Human Resources immediately.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:

03/28/2013, 12/31/2013 01/07/2019, 12/02/2019, 02/18/2020, 07/31/2023, 03/07/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY/ PROCEDURE

Policy/Procedure Number: HR511			Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality			<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
Original Date: 06/26/2009		Next Review Date: 03/07/2025 Last Review Date: 03/07/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
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Approving Entities:	<input type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 03/07/2024	

I. RELATED POLICIES:

- A. [HR703](#)
- B. [HR710](#)
- C. [HR712](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. Occurrence: Unscheduled time off. Examples of an Occurrence include:
 - 1. Absence (3 points): Employee does not work the scheduled shift without prior approval. (Consecutive workday absences will count as one occurrence/3 points).
 - 2. Early Out: Employee leaves work prior to the end of the scheduled shift without scheduling in advance as required by this policy.
 - a. If an employee leaves early and completes half or more of their scheduled shift, the Early Out will be counted as 1 point
 - b. If an employee leaves early and completes less than half of their scheduled shift, the Early Out will be counted as 3 points
 - 3. Tardy: Employee is not present and ready to work (non-exempt employees must be clocked in to ADP) by 3 minutes after the shift start time without scheduling in advance as required by this policy. Employees whose jobs require them to be logged into a department's phone queue must be logged into the phone and available to take calls at the start of the shift.
 - a. If an employee is late and completes half or more of their scheduled shift, the Tardy will be counted as 1 point
 - b. If an employee is late and completes less than half of their scheduled shift, the Tardy will be counted as 3 points
 - 4. Partial Time-Off: Employee leaves for a portion of the day without scheduling in advance as required by this policy (other than an Early Out)
 - a. If an employee leaves for a portion of the day and completes half or more of their scheduled shift, the Partial Time-Off will be counted as 1 point
 - b. If an employee leaves for a portion of the day and completes less than half of their scheduled shift, the Partial Time-Off will be counted as 3 points
- B. Leave without Pay (LWOP): Time off that is not paid and not otherwise protected by law.
- C. Protected Leave of Absence: Time off that is covered under authorized state or federal Leave of Absence, or time off that is considered a reasonable accommodation under any authorized state or

Policy/Procedure Number: HR511		Lead Department: Human Resources	
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federal statute.

- D. No Call, No Show: An employee is absent without notification to their direct report, or their department's attendance line, within two hours after their start time unless circumstances beyond their control have prevented them from notifying in which case, will be handled on a case by case basis. The employee will be considered to have voluntarily resigned their employment at Partnership and will not be eligible for rehire or reinstatement. Exceptions to this procedure may be made if it is determined by Partnership that the employee's absence were due to extenuating circumstances beyond the employee's control, and which prohibited timely notification of the absence.
- E. Flex Schedule: A schedule that offers a range of start times and meal periods. Non-Exempt employees who are enrolled in a 9/80 schedule are not eligible to participate in a Flex schedule.

IV. ATTACHMENTS:

- A. [Acknowledgement of Receipt](#)
- B. [Attendance and Punctuality FAQs](#)

V. PURPOSE:

Partnership's Attendance Policy is designed to maximize operational effectiveness through attendance and punctuality. The information included in this policy will further develop attendance standards for all employees of Partnership. Attendance and punctuality standards are established to ensure equitable, efficient operations and individual accountability.

This Attendance Policy applies to all employees of Partnership. The policy includes expectations for employees, Supervisors, and Managers relating to employee attendance, definitions, and attendance requirements.

VI. POLICY / PROCEDURE:

Partnership expects employees to report to work on a reliable and punctual basis. Absenteeism, early departures from work, and late arrivals burden your fellow employees and Partnership. Regular attendance and punctuality are essential functions of each employee's job.

Employees are expected to report to work as scheduled, on time. Employees also are expected to remain in designated areas on the work premises for their entire work schedule, except for rest or meal periods, when required to leave on authorized Partnership business, or when otherwise excused by their supervisor. Late arrival, early departure, or other unanticipated and unapproved absences from scheduled hours are disruptive, must be avoided, and may result in disciplinary action up to and including termination of employment.

Employees should consult their immediate Supervisor/Manager/Director for specific call-in instructions for their department. Every time an employee is absent or late, they must follow their supervisor's instructions for reporting the tardiness or absence. The employee must also inform their direct report of the expected duration of any absence. Partnership will comply with applicable laws relating to time off from work, but it is the employee's responsibility to provide sufficient information to enable Partnership to determine if the time off is covered by an applicable law. Employees must call-in personally unless extenuating circumstances do not allow doing so (example: a very serious car accident). In those cases, an immediate family member is allowed to report the employee's absence.

If an employee is absent for their own, or a family member's, illness or injury for three (3) days that were not previously scheduled, the employee will be required to submit a note from the treating health care provider (unless the employee elects to utilize their available Paid Sick Leave (PSL)). If an employee fails to acquire

Policy/Procedure Number: HR511		Lead Department: Human Resources	
Policy/Procedure Title: Attendance and Punctuality		<input type="checkbox"/> External Policy <input type="checkbox"/> Internal Policy	
Original Date: 06/26/2009		Next Review Date: 03/07/2025 Last Review Date: 03/07/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

and submit a provider's note before or upon their return, they will be sent home to obtain a note. Providing a health care provider's note does not preclude the employee from an occurrence, as described below.

-Fairfield and Santa Rosa Employees can submit a health care provider's note via secured fax (707) 863-4399, email (HRhelpDesk@partnershiphp.org), physical delivery to Partnership in-person or by employee's designee. Failure to do so may result in corrective action including termination.

-Redding and Eureka Employees can submit a health care provider's note via secured fax (530) 351-9042, email (HRHelpDesk@partnershiphp.org), physical delivery to Partnership in-person or by employee's designee. Failure to do so may result in corrective action including termination.

In requesting this health care provider's note, Partnership complies with the provisions of the Genetic Information Nondiscrimination Act of 2008 (GINA), which prohibits employers from requesting or requiring genetic information of an employee or family member of the employee, except as specifically allowed by this law. To comply with GINA, Partnership asks that employees not provide any genetic information when responding to this request for medical information. Please see the Requests for Medical Certification policy in the Employee Handbook for more information.

If an employee is absent for their own, or a family member's, illness or injury for five (5) consecutive days that were not previously scheduled, the employee should contact HR to discuss Leave of Absence (LOA) options (unless the employee elects to utilize their available Paid Sick Leave (PSL). Management should also advise HR of any possible LOA situations.

Excessive absenteeism may lead to disciplinary action, up to and including termination of employment. Absences may be excessive if they occur frequently or if they show a pattern. Absences immediately before or after holidays and weekends are suspect. Continuing patterns of absences, early departures, tardies, or unexcused exception reports, regardless of the exact number of days, may also result in disciplinary action, up to and including termination of employment.

Individuals with disabilities may be granted reasonable accommodation in complying with these policies.

A. Expectations

1. Each employee is expected to be present and ready to work on time, and non-exempt employees must also clock in on time. For positions required to sign on to phones, the employee must be logged into their phone and ready to take calls at the start of their shift. The employee must remain signed onto the phone and work until the conclusion of the shift, and, if applicable, all of the calls in the queue are answered. Leadership will adjust break and meal periods accordingly. Employees not required to sign on to the phone must leave and return from break/meal periods at the scheduled time. Employees must also notify Supervisor(s) when there is a scheduling or coverage gap.
2. Unless otherwise required by law, the following rules apply to requesting paid time off (PTO). One weeks' notice is preferable when requesting time off. Department leadership can decide to accommodate a request that is submitted within a week if they determine that department needs can still be met.
3. Employees are responsible for understanding that unless expressly approved by their department head, non-exempt employees should never have a punch source from any mobile device. Violation may be considered as timecard fraud that is subject to appropriate disciplinary action, up to and including termination.
4. Employees must submit an Exception Report, signed by their supervisor, to Payrollhelpdesk@partnershiphp.org to account for a missed time card punch, an employee who

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demonstrates patterns of use will be subject to appropriate disciplinary action up to and including termination. A Corrective Action Plan (CAP) may be used to document these issues and outline an improvement plan.

5. Partnership recognizes employees will, at times, be absent from work and that, occasionally, unforeseen circumstances will cause employees to be late for work. Employees are expected to report absences to their direct Supervisor/Manager/Director, or to their department's attendance line before the start of their scheduled work shift as set forth above.
 6. Occurrence points issued pursuant to this Attendance Policy are maintained for a rolling 12-month calendar period for each employee. Managers and Supervisors track and trend attendance, attendance patterns and address concerns with staff as needed.
 7. Employees who are expressly offered a Flex Schedule by their department leadership are required to manage their start time, meal period, rest periods, and end time responsibly. Employees utilizing a Flex Schedule are required to adhere to their assigned work hours and meal periods. Flex schedules may be revoked by department leadership at any time.
 8. Employees who utilize the 9/80 schedule must adhere to the meal periods agreed upon in the 9/80 Schedule Agreement. Not adhering to meal periods will be considered an abuse of the 9/80 agreement, and is subject to appropriate disciplinary action, up to and including termination.
 9. An employee will not be allowed to use the time off code for Leave Without Pay (LWOP) if the employee has PTO hours available in their PTO bank, unless otherwise permitted by law. If an employee does not have PTO accrued for time off not covered by a protected leave of absence, leadership may deny the time off request or not "advance" time off. If an employee uses LWOP to cover an absence, early out, tardy or partial time off, the time off will be counted as 3 points, rather than the point values described below.
 10. In the event of an employee's rehire within 12 months from his or her separation date, the rehired employee's attendance occurrences will be reinstated on a rolling 12-month calendar basis.
 11. With guidance from Human Resources, members of Department Leadership will be responsible for ensuring consistent compliance with, and administration of, this policy within their department.
- B. Occurrence Exceptions**
1. Occurrence points for absences or tardiness will not be assessed against an employee under the following circumstances:
 - a. Authorized leaves of absence, including all legally required leaves of absence approved by Partnership, such as leave under the Family and Medical Leave (FMLA), the California Family Rights Act (CFRA), and/or Pregnancy Disability Leave (PDL).
 - b. Certain school-related matters (according to California Labor Code 230.8).
 - c. Necessary reasonable accommodation of a disability as defined by the Americans with Disabilities Act, Americans with Disabilities Act Amendments Act, and Fair Employment and Housing Act, provided such accommodation does not create an undue hardship to Partnership.
 - d. Military leave.
 - e. Use of Paid Sick Leave hours.
 - f. Jury duty, provided documentation is supplied as set forth in Partnership's Civic Duty Policy.
 - g. Court subpoenas, provided the employee notifies Partnership with as much advance notice as reasonably possible.
 - h. If an employee is directed by the Partnership to leave work early due to lack of work or by mutual agreement. For example, in circumstances such as when call volume is low or there is a power outage, inclement weather, etc., department leadership may decide that having a full staff in the office is not necessary. In these situations, leadership may offer to an employee the chance to leave work for the remainder of the day. If the employee accepts, they will be instructed to clock out and will not receive compensation for hours not worked. The employee

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will have to make up the hours not worked with PTO. If the employee does not have enough PTO to cover the hours not worked, the difference in hours will be made up with Leave without Pay.

- i. Pre-approved modifications of an employee's work schedule. Documentation may be requested.
- j. Bereavement leave. Documentation may be requested.
- k. Authorized vacation.
- l. Holidays recognized by Partnership provided the employee is not scheduled to work on the holiday.
- m. Disciplinary suspension.
- n. Layoff.
- o. Any other protected leave in accordance with state and/or federal law.

C. Discipline for Occurrences

- 1. The following rating scale has been established to define attendance performance for staff.
 - a. The occurrences are measured on a rolling 12-month period, based on months worked.
 - b. Employees who fall below "full performance" may be subject to disciplinary action, up to and including termination.
 - c. Employees who demonstrate a pattern of inappropriate attendance may be subject to disciplinary action, up to and including termination, regardless of performance rating. Examples may include:
 - 1) Regularly calling in to report an absence on a Monday or a Friday.
 - 2) Calling in to report an absence on a day for which a prior leave or PTO request was denied.
 - 3) Continuous incidents of corrective action plans related to the attendance policy
 - d. Newly-hired employees are expected to maintain 4 or fewer points for the duration of their first 90 days of employment. Employees obtaining more than 4 points during the first 90 days may be subject to disciplinary action, up to and including termination. These cases may be reviewed on a case by case basis by management. New employees who join departments with previously-established and mandatory training will not be allowed to miss any time during training.
 - e. Of course, an employee may be subject to disciplinary action if their attendance is unsatisfactory, even if the employee has not accrued excessive points. Additionally, Partnership may consider an employee's attendance in conjunction with other factors, like performance and behavior. For example, if an employee's performance is poor, Partnership may consider that performance record in conjunction with their attendance in determining the appropriate performance rating or corrective action.

ATTENDANCE POINTS SCALE		
12 Months Rolling Total	Performance Rating	Corrective Action
0 – 6 points	Exceeds Performance	None
7 – 12 points	Full Performance	None

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13 – 18 points	Developing	At 13 points, a verbal warning will be issued. *At 15 points, a written warning will be issued. *At 17 points, a final warning will be issued. *Please use official CAP form (HR405-A) for written warnings
19 + points	Unsatisfactory / Needs Immediate Improvement	At 19 points or more, it is grounds for termination.

D. Enforcement

1. This Attendance Policy will be enforced in accordance with all applicable federal and state laws. Partnership will not consider, for disciplinary purposes, occurrences protected by such laws and does not intend to discipline any employee in contravention of such laws. If you believe you have been subjected to disciplinary action for a protected absence/occurrence under federal and/or state law, please bring it to the attention of a Director or Manager of Human Resources immediately.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:

03/28/2013, 12/31/2013 01/07/2019, 12/02/2019, 02/18/2020, 07/31/2023, 03/07/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR512			Lead Department: Human Resources	
Policy/Procedure Title: Mileage Reimbursement			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/11/2013		Next Review Date: 01/01/2024 05/07/2025 Last Review Date: 01/01/2023 05/07/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: <i>Liz Gibboney</i>			Approval Date: 03/23/2018 03/23/2018	

I. RELATED POLICIES:

A. [HR506](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS: N/A

V. PURPOSE:

The following policy will provide Partnership HealthPlan of California (~~PHC~~[Partnership](#)) employees with the appropriate guiding principles regarding mileage reimbursement for traveling for company business and teleworking.

VI. POLICY / PROCEDURE:

A. For business needs that require employees to work away from his or her regular work site, PHC will reimburse mileage to employees at the IRS standard mileage rate used to calculate the deductible costs of operating an automobile for business in place at the time of travel. Travel to and from the central worksite and an employee's home will not be reimbursable. Central worksite location will be assigned and approved by the department director and Human Resources (HR).

~~B. Telework and non-telework employees will not be reimbursed mileage for any travel to the central worksite from their home and back.~~

~~1. For off-site visits from the teleworker's home, PHC will reimburse the use of privately owned vehicles on actual mileage, to the nearest mile, less the number of miles required to drive from the teleworker's residence to the central worksite, and back again, on a single day.~~

~~1. All employees must use the mileage app in Concur to calculate mileage. If traveling from home to airport for company business, deduct your usual mileage from home to work and record any remaining mileage to the airport.~~ **Part Time Remote:** Employees will not be reimbursed mileage to travel to their central worksite. If employees are required to travel to a non-central worksite location, they will be reimbursed their mileage in excess of their normal commute.

a. Example: Employee lives 5 miles away from their central worksite. They travel to Dr. Smith's office from their home, which is 23 miles away (46 roundtrip). They will be reimbursed for 36 miles: 46 miles (total miles traveled) – 10 miles (normal roundtrip commute) = 36 miles (business expense)

2. Full-Time Remote: Employees home addresses will be used as their "office location" and will be

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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

reimbursed for mileage from their home to the central worksite (minus 30 miles one way as this is considered a reasonable commute radius). If employees are required to travel to a non-central worksite location, they will be reimbursed from their starting location.

- a. Example 1: Employee lives 31 miles from central worksite, employee will be reimbursed for one mile.
- b. Example 2: Employee travels to Dr. Smith's office from their home, they will not be required to deduct their "reasonable commute" miles.
3. **Out of State Employees or those more than 300 miles from their designated Partnership Office:** Employees will be reimbursed for up to two visits to their designated Partnership worksite per year, and up to 4 times a year with CEO approval. Partnership will provide employees with advance notice of at least 30 days.
4. **Travel Time for all Remote Workers:** Partnership highly encourages remote workers to start and end their work day at the central worksite when it's necessary to come in for meetings or other activities. When starting/ending your workday at the central worksite travel time is not compensable.
 - a. If an employee is required to travel to the central worksite for required meetings/activities during their regularly scheduled work hours this is considered compensable time.
 - b. If an employee chooses to travel to the central worksite for voluntary activities with no other work being performed as outlined below this is not considered compensable time.
 - 1) Outside of normal business hours (lunch, weekends)
 - 2) Voluntary
 - 3) Not job related
 - 4) No other work concurrently performed
 - 5) See table below on what events are considered reimbursable/non reimbursable:

<u>Reimbursable</u>	<u>Non Reimbursable</u>
<u>Employee Recognition Celebration (May)</u>	<u>Appreciation Luncheon (November)</u>
<u>Town Halls</u>	<u>Summer Celebration</u>
<u>Employee Engagement Activities</u>	<u>Fundraisers</u>
<u>Department Meetings</u>	<u>Craft Fair</u>
	<u>Halloween</u>
	<u>Pictures with Santa</u>
	<u>Ice Cream Social</u>

- ~~2. If traveling to a business meeting from home, deduct your usual mileage from home to work and record any remaining mileage to the meeting.~~
- ~~3.5.~~ If attending a business meeting and you leave from the central worksite, record mileage from the central worksite to meeting location.
6. Reimbursement for approved expense reports will be processed by Accounts Payable within two weeks of the expense request being approved by the employee's direct supervisor.
7. All employees must use the mileage app in Concur to calculate mileage. If traveling from home to airport for company business, deduct your usual mileage from home to work and record any remaining mileage to the airport.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

Policy/Procedure Number: HR512		Lead Department: Human Resources	
Policy/Procedure Title: Mileage Reimbursement		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/11/2013		Next Review Date: 01/01/2024 05/07/2024 Last Review Date: 01/01/2023 05/07/2024	
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A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Directors, Accounts Payable, Human Resources

X. REVISION DATES: 03/23/2018, 06/07/2020

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR512			Lead Department: Human Resources		
Policy/Procedure Title: Mileage Reimbursement			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy		
Original Date: 03/11/2013		Next Review Date: 05/07/2025 Last Review Date: 05/07/2024			
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC		
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT	
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC	
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 05/16/2024		

I. RELATED POLICIES:

A. [HR506](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS: N/A

V. PURPOSE:

The following policy will provide Partnership HealthPlan of California (Partnership) employees with the appropriate guiding principles regarding mileage reimbursement for traveling for company business and teleworking.

VI. POLICY / PROCEDURE:

- A. For business needs that require employees to work away from his or her regular work site, PHC will reimburse mileage to employees at the IRS standard mileage rate used to calculate the deductible costs of operating an automobile for business in place at the time of travel. Travel to and from the central worksite and an employee's home will not be reimbursable. Central worksite location will be assigned and approved by the department director and Human Resources (HR).
1. **Part Time Remote:** Employees will not be reimbursed mileage to travel to their central worksite. If employees are required to travel to a non-central worksite location, they will be reimbursed their mileage in excess of their normal commute.
 - a. Example: Employee lives 5 miles away from their central worksite. They travel to Dr. Smith's office from their home, which is 23 miles away (46 roundtrip). They will be reimbursed for 36 miles: 46 miles (total miles traveled) – 10 miles (normal roundtrip commute) = 36 miles (business expense)
 2. **Full-Time Remote:** Employees home addresses will be used as their "office location" and will be reimbursed for mileage from their home to the central worksite (minus 30 miles one way as this is considered a reasonable commute radius). If employees are required to travel to a non-central worksite location, they will be reimbursed from their starting location.
 - a. Example 1: Employee lives 31 miles from central worksite, employee will be reimbursed for one mile.
 - b. Example 2: Employee travels to Dr. Smith's office from their home, they will not be required to deduct their "reasonable commute" miles.

Policy/Procedure Number: HR512		Lead Department: Human Resources	
Policy/Procedure Title: Mileage Reimbursement		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/11/2013		Next Review Date: 05/07/2024 Last Review Date: 05/07/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

3. **Out of State Employees or those more than 300 miles from their designated Partnership Office:** Employees will be reimbursed for up to two visits to their designated Partnership worksite per year, and up to 4 times a year with CEO approval. Partnership will provide employees with advance notice of at least 30 days.
4. **Travel Time for all Remote Workers:** Partnership highly encourages remote workers to start and end their work day at the central worksite when it's necessary to come in for meetings or other activities. When starting/ending your workday at the central worksite travel time is not compensable.
 - a. If an employee is required to travel to the central worksite for required meetings/activities during their regularly scheduled work hours this is considered compensable time.
 - b. If an employee chooses to travel to the central worksite for voluntary activities with no other work being performed as outlined below this is not considered compensable time.
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 - 2) Voluntary
 - 3) Not job related
 - 4) No other work concurrently performed
 - 5) See table below on what events are considered reimbursable/non reimbursable:

Reimbursable	Non Reimbursable
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Town Halls	Summer Celebration
Employee Engagement Activities	Fundraisers
Department Meetings	Craft Fair
	Halloween
	Pictures with Santa
	Ice Cream Social

5. If attending a business meeting and you leave from the central worksite, record mileage from the central worksite to meeting location.
6. Reimbursement for approved expense reports will be processed by Accounts Payable within two weeks of the expense request being approved by the employee's direct supervisor.
7. All employees must use the mileage app in Concur to calculate mileage. If traveling from home to airport for company business, deduct your usual mileage from home to work and record any remaining mileage to the airport.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Directors, Accounts Payable, Human Resources

X. REVISION DATES: 03/23/2018, 06/07/2020, 05/07/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2014		Next Review Date: 01/01/2024 02/14/2025 Last Review Date: 12/06/2022 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE <input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE <input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney Sonja Bjork		Approval Date: 12/06/2022	

I. RELATED POLICIES:

- A. [HR506](#)
- B. [CMP28](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. Conferences: an off-site educational and/or business event. This term will be used to describe all off-site conferences, meetings, committees, workshops, seminars, and trainings. This will also cover any meeting, seminar, training, etc. that requires a registration fee.
- B. Business meetings: approved attendance at various work groups, committees, or other meetings where attendee is representing **PartnershipPHC** in an official capacity. Typically does not require a registration fee.
- C. Department head: the employee responsible for their department budget and ultimately accountable for the overall success of their department. For further explanation, see policy HR214 for leveling criteria.
- D. Major conference: conference whose total cost (registration fee, travel, lodging, etc.) is greater than \$1,500.00, out-of-state, and/or longer than three (3) days.

IV. ATTACHMENTS:

- A. Education & Travel Inquiry/Request Form
- B. Education & Travel Inquiry/Request Form Instructions
- C. Tuition/Certification Program Approval Form
- D. Tuition/Certification ~~and License/Membership~~ Reimbursement [Workflow](#) Reference Guide
- E. [Licensure Renewal & Membership Dues Approval Form](#)
- ~~FE.~~ Concur Training (LMS)
- ~~GF.~~ Concur Expense Reimbursement Reminders
- ~~HG.~~ Conference Summary Report

V. PURPOSE:

Partnership HealthPlan of California (**PHCPartnership**) believes that employees should have the opportunity to improve job performance and stay abreast of industry trends, through continuing education, training and development, and networking with industry peers. **PHC-Partnership** provides the opportunity for employees to develop and/or enhance their professional skills and to assist them with their career development goals.

The following policy will provide staff with the appropriate guiding principles regarding employee growth and

Policy/Procedure Number: HR514		Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

development.

VI. POLICY / PROCEDURE:

PHC-Partnership will educate and train employees through a variety of approaches (depending on company/departmental budget); including orientation sessions, in-service activities, continuing education, and externally offered conferences. These activities will be provided or supported on the basis of operational goals and objectives and the mutual benefit of the employee and employer.

A. Conferences and Business Meetings (defined above):

1. Conference Approval:

- Conferences will be considered after all in-house resources have been explored.
- Must be job-related or fall into an approved career path.
- Department representatives may attend conferences based on organization need and through approval.
- Any major conference (as defined in Section III, D) request requires CEO approval, prior to registration.
- Department heads may allocate their conference budget based on department need, but must consider their budget, costs, and approvals per the Chart of Authority (found on the Education & Travel Inquiry/Request Form or PHC4Me~~attachment D~~). Fiscal budgeted amounts, per department, are based on the following criteria and automatically added during the fiscal year budget process. If more than the allotted amount is needed, justification is required for CEO approval.
 - Chiefs/Sr. Directors: \$5,000.00
 - Directors/Associate Directors: \$3,000.00
 - Managers: \$2,000.00
 - Supervisors: \$500.00
 - All Staff: \$100.00
- Justification and CEO approval, is required for sending more than one (1) PHC-Partnership representative to conferences as travel budgets are limited and costs can be controlled by planning efficiently. If more than one (1) employee is approved to attend the same conference, effort should be made to obtain a group discount on the registration fee, if such a discount is available.
- Effort should be made to take advantage of early registration rates, if such discount is available.
- All of the above mentioned activities may be considered on a case-by-case basis. CEO has the authority to overturn any approvals. Exceptions to conference limitations may be considered by the CEO for CA Association of Health Plans Annual Conference.
- HR reserves the right to verify attendance of all conferences. Staff who register for a conference but don't attend will not be reimbursed and/or will face possible disciplinary action, up to and including termination.

2. Travel/Education Request:

- All requests must be submitted on an approved Travel/Education Request~~Education & Travel Inquiry/Request Form~~ by their Department Head to Training and Development, **at least 3 weeks prior** to registering/booking.
- It must be stipulated on the Education & Travel Inquiry/Request Form~~Travel/Education Request~~, if the request is a conference or business meeting.
- All conferences or business meetings that require flight and/or lodging must have prior approval (of at least three weeks) and in accordance with the Chart of Authority.
- All Travel/Education Requests will follow the ~~policy-workflow~~Education & Travel Inquiry/Request Form Instructions (attachment BA).

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

3. Travel Arrangements:

- a. Travel arrangements can be made by HR, the Executive Assistant, Department Administrative Assistant, ~~or~~ or conference attendee.

1) Air Travel

- a) All air travel should be reserved and planned at “economy,” “tourist,” or “coach” fares, unless authorized to travel at level(s) higher as indicated below:
 - i. The employee is required to travel at night due to conference start time.
 - ii. The higher fare is equivalent to the daytime “coach” fare.
 - iii. The employee is receiving an upgrade through their own individual points/awards program, which results in no additional expense to PHC Partnership.
 - iv. Other personal or business reasons which the CEO may approve as necessary.
- b) PHC Partnership will reimburse up to one (1) checked-in bag when checked-in baggage fees are not included.
- c) PHC Partnership will reimburse for Early Bird Check-In.
- d) Frequent flyer discounts and mileage programs; employees who are members of frequent flyer or mileage programs may elect to use their individual points, miles, or other benefits earned while on PHC Partnership travel. Additionally, employees may use these programs to upgrade their travel accommodations as long as there is no increased cost to PHC Partnership.
- e) When planning and scheduling air travel, employees should consider the following as opportunities for potential savings:
 - i. Plan ahead; schedule the flights as far ahead as possible to take advantage of lower fares, with consideration for nonrefundable tickets and the potential that the trip could change.
 - ii. When feasible, consider traveling at off hours or using Saturday night or weekend stay over to lower fares. Note that when this can be done to save airfare dollars, PHC Partnership will pay the additional lodging costs incurred if the net cost is equal or lower. CEO approval is required for these itinerary changes.
 - iii. Indirect routing versus direct routing; in some situations and with some carriers it may be significantly less expensive to take an indirect route with only a slight time inconvenience for the traveler.
 - iv. Departure and destination airports; in some situations it may be less expensive to use an alternate airport and only incur a slight difference in ground transportation time. An example is flying from Oakland or San Jose instead of Sacramento or San Francisco.
 - v. When traveling shorter distances (100 to 200 miles), consider the cost and time involved with driving, versus the cost of flying and then acquiring a rental car, especially when more than one traveler is involved.
- f) Travel extensions and indirect routing; employee may, for personal purposes, use indirect flights, Saturday night stay overs, and stopovers to or from business destinations, or extend authorized business trips for personal reasons. When these itinerary changes require more time than the scheduled business trip, employees must be traveling on weekend or holiday time or be in a vacation status. The department head or direct report (whichever is higher) has approval authority for these itinerary changes as long as they take place in advance of the travel. Employees must certify that these changes will not result in any additional cost to PHC Partnership, or be required to reimburse PHC Partnership for the higher costs.

2) Lodging:

- a) PHC Partnership will reimburse out-of-town lodging for conferences of two (2) or more

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days with a greater than 60 mile radius from ~~PHC-Partnership~~ (Lodging for one (1) day conferences may be approved for greater than 100 miles radius from ~~PHCPartnership.~~), unless there is a compelling business need with approval by the CEO or COO on a case-by-case basis.

- b) Employees are encouraged to stay at the conference hotel. If staying at an alternate location, justification and approval by the CEO or COO is required prior to booking.
- c) If alternate arrangements are made, it is encouraged to book within walking distance of conference site.

3) Meals:

- a) Meals will be reimbursed per policy HR506, Employee Reimbursement for Employee Growth & Career Development.

4) Auto Rentals & Mileage:

- a) If traveling to a conference or airport for company business and you leave from work or home, deduct your usual mileage from work to home and record any remaining mileage to the conference or airport.
- b) Rental cars may be allowed only if least expensive mode or distinct business purpose.
- c) If a rental car is the least expensive mode of transportation, ~~PHC-Partnership~~ will only reimburse for compact size or less. Upgrades are only allowed if there is no increased cost to ~~PHCPartnership~~, or if there is a business need with prior approval from the COO or CEO. Rental car or other transportation is for business purpose only, not for personal use.
- d) Employees should plan for their own individual insurance policies to cover them in rental car situations. If uncertain, employee should review their insurance policy prior to travel to ensure coverage. Optional insurance coverage will not be approved as a necessary expense.

4. After the conference:

- a. If submitting a request for reimbursement, attendee must attach a copy of the approved Education & Travel Inquiry/Request Form~~Travel/Education Request~~, along with all substantiating documentation (please see policy HR506).
- b. Attendees are expected to attend the conference and, if attended a multi-day or major conference must provide a summary report upon return with their reimbursement request (see attachment ~~HGC~~ for template).
- c. Except in the case of extenuating circumstances, staff who register for a conference but don't attend will not be approved for future travel and/or will face possible disciplinary action, up to and including termination.

B. Guidelines for Trainings through the Learning Management System (LMS):

1. Mandatory Trainings:

- a. Partnership HealthPlan of California requires all new hires to complete the Employee Onboarding training.
- b. Partnership HealthPlan of California requires all employees to complete trainings on the following topics at least once annually; ~~PHC-Partnership~~ Compliance Plan, Fraud Waste and Abuse, Health Insurance Portability and Accountability Act (HIPAA) Privacy and Security, ~~PHC-Partnership~~ Code of Conduct, Sexual Harassment AB1825, Diversity, Equity & Inclusion (DEI), Cyber Security Awareness, etc. Mandatory training and other agency requirements are listed with specific due dates on the employee's training plan.
- c. All mandatory training is expected to be completed on or before the "required by" date and should be done during the employee's scheduled work hours. Employees will be paid their regular rates. Non-exempt employees must obtain prior written approval from their supervisor if

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Original Date: 08/25/2014		Next Review Date: 01/01/2024 02/14/2025 Last Review Date: 12/06/2022 02/14/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

training time will require overtime pay. Exempt employees may complete the training outside their regular scheduled hours, at their discretion, but will not receive any additional compensation or time off.

- d. Timely completion of training may be part of an employee's performance evaluation. Employees may not be eligible for raises, promotions, or other compensation until all required training is completed. Completion of required trainings does not guarantee raises, promotion, or other compensation or in any way alter the "at will" status of employment.
2. Recommended Trainings:
 - a. From time to time an employee's direct manager may recommend or assign specific trainings as a performance improvement activity or as part of an employee's professional development plan. If training is assigned, the employee's direct manager is expected to allow training time within normal work hours. If training is recommended, but not required by the direct manager, it is expected that the training will be completed on the employee's personal time.
3. Elective Training:
 - a. PHC's Partnership's LMS provides a library of professional courses on a variety of professional topics. Employees may, at their own discretion, take online courses for continuing education credit, for professional development, or personal interest at no cost. Employees choosing to take online courses at their own discretion, as electives, should do so on their own time and will not be compensated for their time.

C. Star 12 Membership Trainings:

1. Guidelines:

- a. ~~Employee must receive approval through the Department Head.~~
- b. ~~Employees are allowed to attend three (3) in person seminars per membership year, with Department Head approval. After three (3) seminars, additional approval is required by the CEO or COO.~~
- c. ~~Employees are allowed to attend unlimited webinars, with Department Head approval.~~
- d. ~~Employees who attend webinars, must follow the same recommended or elective training guidelines as stated in section B, "Guidelines for Trainings through the LMS."~~
- e. ~~Training & Development is responsible for tracking and coordinating all Star 12 webinars and seminars.~~
- f. ~~Employees must provide Training & Development with a copy of all training certifications received.~~

2. Payment Process for Star 12:

- a. ~~All Star 12 training requests must be made through Training & Development and paid through the PHC Partnership purchasing process.~~
- b. ~~Training hours will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations.~~
- c. ~~All Star 12 requests must have the appropriate signatures before submitting to Finance.~~
- d. ~~Reimbursement for approved expense reports will be processed with the normal AP check runs.~~

D.C. Tuition and Certifications:

1. Guidelines for Tuition and/or Certification Pre-Approval:
 - a. Employee must be a regular full-time employee and have completed six (6) months of continuous employment.
 - b. Employee must take a job-related courses, relevant to current job responsibilities or planned career progression.
 - c. Courses qualifying for reimbursement must be completed in an accredited educational

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- institution. College, university, and business college courses are qualified under this program.
- d. Prior to enrollment of courses, employee must complete a [Tuition/Certification Program Approval Form](#) ~~Tuition/Certification Reimbursement Approval Form~~ (attachment C), obtain Director/Manager's review and signature approval, and turn into Training & Development for pre-approval. Form must be signed by Director/Manager and Training & Development.
 - 1) For each semester, term, or equivalent, a separate [Tuition/Certification Program Approval Form](#) ~~Tuition Approval Form~~ will be required. Course titles and details must be attached to the form. T&D will provide the employee with the final approved [Tuition/Certification Program Approval Form](#) ~~Tuition/Certification reimbursement form~~ for processing through concur.
 - e. ~~PHC-Partnership~~ will reimburse according to policy HR506.

E.D. Continuing Education for Licensure Renewals:

1. Guidelines for Continuing Education for Licensure Renewals:
 - a. Employee must be a regular full-time employee; part-time employees (working less than 32 hours/week) may have license renewal on a prorated basis, based on the percentage of full-time of their usual schedule.
 - b. Continuing education and/or license is required to perform job duties.
 - c. Continuing education will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations.
 - d. Prior to enrollment, employee must complete a [Tuition/Certification Program Approval Form](#) ~~Tuition/Certification Reimbursement Approval Form~~ (attachment C) for all applicable continuing education units, obtain Director/Manager's signatures, and turn into Training & Development for pre-approval. Form must be signed and dated by Director/Manager and Training & Development.
 - e. Continuing education units must not exceed the maximum reimbursement allowance and must be an approved course as outlined on the Board website as it pertains to each specific license. Training & Development will track completion.
 - f. Copy of license to remain in employee's personnel file.

F.E. Reimbursement:

1. See policy HR506 for Employee Reimbursement.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES: 07/08/2015, 10/29/2018, 12/06/2022, ~~1/31/24~~02/14/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR514			Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/25/2014		Next Review Date: 02/14/2025 Last Review Date: 02/14/2024		
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Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 02/23/2024	

I. RELATED POLICIES:

- A. [HR506](#)
- B. [CMP28](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. Conferences: an off-site educational and/or business event. This term will be used to describe all off-site conferences, meetings, committees, workshops, seminars, and trainings. This will also cover any meeting, seminar, training, etc. that requires a registration fee.
- B. Business meetings: approved attendance at various work groups, committees, or other meetings where attendee is representing Partnership in an official capacity. Typically, does not require a registration fee.
- C. Department head: the employee responsible for their department budget and ultimately accountable for the overall success of their department. For further explanation, see policy HR214 for leveling criteria.
- D. Major conference: conference whose total cost (registration fee, travel, lodging, etc.) is greater than \$1,500.00, out-of-state, and/or longer than three (3) days.

IV. ATTACHMENTS:

- A. [Education & Travel Inquiry/Request Form](#)
- B. [Education & Travel Inquiry/Request Form Instructions](#)
- C. [Tuition/Certification Program Approval Form](#)
- D. [Licensure Renewal & Membership Dues Approval Form](#)
- E. [Tuition/Certification Reimbursement Workflow Reference Guide](#)
- F. [Concur Training \(LMS\)](#)
- G. [Concur Expense Reimbursement Reminders](#)
- H. [Conference Summary Report](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) believes that employees should have the opportunity to improve job performance and stay abreast of industry trends, through continuing education, training and development, and networking with industry peers. Partnership provides the opportunity for employees to develop and/or enhance their professional skills and to assist them with their career development goals.

The following policy will provide staff with the appropriate guiding principles regarding employee growth and development.

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VI. POLICY / PROCEDURE:

Partnership will educate and train employees through a variety of approaches (depending on company/departmental budget); including orientation sessions, in-service activities, continuing education, and externally offered conferences. These activities will be provided or supported on the basis of operational goals and objectives and the mutual benefit of the employee and employer.

A. Conferences and Business Meetings (defined above):

1. Conference Approval:

- a. Conferences will be considered after all in-house resources have been explored.
- b. Must be job-related or fall into an approved career path.
- c. Department representatives may attend conferences based on organization need and through approval.
- d. Any major conference (as defined in Section III, D) request requires CEO approval, prior to registration.
- e. Department heads may allocate their conference budget based on department need, but must consider their budget, costs, and approvals per the Chart of Authority (found on the Education & Travel Inquiry/Request Form or PHC4Me). Fiscal budgeted amounts, per department, are based on the following criteria and automatically added during the fiscal year budget process. If more than the allotted amount is needed, justification is required for CEO approval.
 - 1) Chiefs/Sr. Directors: \$5,000.00
 - 2) Directors/Associate Directors: \$3,000.00
 - 3) Managers: \$2,000.00
 - 4) Supervisors: \$500.00
 - 5) All Staff: \$100.00
- f. Justification and CEO approval, is required for sending more than one (1) Partnership representative to conferences as travel budgets are limited and costs can be controlled by planning efficiently. If more than one (1) employee is approved to attend the same conference, effort should be made to obtain a group discount on the registration fee, if such a discount is available.
- g. Effort should be made to take advantage of early registration rates, if such discount is available.
- h. All of the above mentioned activities may be considered on a case-by-case basis. CEO has the authority to overturn any approvals. Exceptions to conference limitations may be considered by the CEO for CA Association of Health Plans Annual Conference.
- i. HR reserves the right to verify attendance of all conferences. Staff who register for a conference but don't attend will not be reimbursed and/or will face possible disciplinary action, up to and including termination.

2. Travel/Education Request:

- a. All requests must be submitted on an approved Education & Travel Inquiry/Request Form by their Department Head to Training and Development, **at least 3 weeks prior** to registering/booking.
- b. It must be stipulated on the Education & Travel Inquiry/Request Form, if the request is a conference or business meeting.
- c. All conferences or business meetings that require flight and/or lodging must have prior approval (of at least three weeks) and in accordance with the Chart of Authority.
- d. All Travel/Education Requests will follow the Education & Travel Inquiry/Request Form Instructions (attachment B).

3. Travel Arrangements:

- a. Travel arrangements can be made by HR, Department Administrative Assistant, or conference

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attendee.

1) Air Travel

- a) All air travel should be reserved and planned at “economy,” “tourist,” or “coach” fares, unless authorized to travel at level(s) higher as indicated below:
 - i. The employee is required to travel at night due to conference start time.
 - ii. The higher fare is equivalent to the daytime “coach” fare.
 - iii. The employee is receiving an upgrade through their own individual points/awards program, which results in no additional expense to Partnership.
 - iv. Other personal or business reasons which the CEO may approve as necessary.
- b) Partnership will reimburse up to one (1) checked-in bag when checked-in baggage fees are not included.
- c) Partnership will reimburse for Early Bird Check-In.
- d) Frequent flyer discounts and mileage programs; employees who are members of frequent flyer or mileage programs may elect to use their individual points, miles, or other benefits earned while on Partnership travel. Additionally, employees may use these programs to upgrade their travel accommodations as long as there is no increased cost to Partnership.
- e) When planning and scheduling air travel, employees should consider the following as opportunities for potential savings:
 - i. Plan ahead; schedule the flights as far ahead as possible to take advantage of lower fares, with consideration for nonrefundable tickets and the potential that the trip could change.
 - ii. When feasible, consider traveling at off hours or using Saturday night or weekend stay over to lower fares. Note that when this can be done to save airfare dollars, Partnership will pay the additional lodging costs incurred if the net cost is equal or lower. CEO approval is required for these itinerary changes.
 - iii. Indirect routing versus direct routing; in some situations, and with some carriers it may be significantly less expensive to take an indirect route with only a slight time inconvenience for the traveler.
 - iv. Departure and destination airports; in some situations, it may be less expensive to use an alternate airport and only incur a slight difference in ground transportation time. An example is flying from Oakland or San Jose instead of Sacramento or San Francisco.
 - v. When traveling shorter distances (100 to 200 miles), consider the cost and time involved with driving, versus the cost of flying and then acquiring a rental car, especially when more than one traveler is involved.
- f) Travel extensions and indirect routing; employee may, for personal purposes, use indirect flights, Saturday night stay overs, and stopovers to or from business destinations, or extend authorized business trips for personal reasons. When these itinerary changes require more time than the scheduled business trip, employees must be traveling on weekend or holiday time or be in a vacation status. The department head or direct report (whichever is higher) has approval authority for these itinerary changes as long as they take place in advance of the travel. Employees must certify that these changes will not result in any additional cost to Partnership, or be required to reimburse Partnership for the higher costs.

2) Lodging:

- a) Partnership will reimburse out-of-town lodging for conferences of two (2) or more days with a greater than 60-mile radius from Partnership (Lodging for one (1) day conferences may be approved for greater than 100-mile radius from Partnership.),

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unless there is a compelling business need with approval by the CEO or COO on a case-by-case basis.

- b) Employees are encouraged to stay at the conference hotel. If staying at an alternate location, justification and approval by the CEO or COO is required prior to booking.
- c) If alternate arrangements are made, it is encouraged to book within walking distance of conference site.

3) Meals:

- a) Meals will be reimbursed per policy HR506, Employee Reimbursement for Employee Growth & Career Development.

4) Auto Rentals & Mileage:

- a) If traveling to a conference or airport for company business and you leave from work or home, deduct your usual mileage from work to home and record any remaining mileage to the conference or airport.
- b) Rental cars may be allowed only if least expensive mode or distinct business purpose.
- c) If a rental car is the least expensive mode of transportation, Partnership will only reimburse for compact size or less. Upgrades are only allowed if there is no increased cost to Partnership, or if there is a business need with prior approval from the COO or CEO. Rental car or other transportation is for business purpose only, not for personal use.
- d) Employees should plan for their own individual insurance policies to cover them in rental car situations. If uncertain, employee should review their insurance policy prior to travel to ensure coverage. Optional insurance coverage will not be approved as a necessary expense.

4. After the conference:

- a. If submitting a request for reimbursement, attendee must attach a copy of the approved Education & Travel Inquiry/Request Form, along with all substantiating documentation (please see policy HR506).
- b. Attendees are expected to attend the conference and, if attended a multi-day or major conference must provide a summary report upon return with their reimbursement request (see attachment H for template).
- c. Except in the case of extenuating circumstances, staff who register for a conference but don't attend will not be approved for future travel and/or will face possible disciplinary action, up to and including termination.

B. Guidelines for Trainings through the Learning Management System (LMS):

1. Mandatory Trainings:

- a. Partnership HealthPlan of California requires all new hires to complete the Employee Onboarding training.
- b. Partnership HealthPlan of California requires all employees to complete trainings on the following topics at least once annually; Partnership Compliance Plan, Fraud Waste and Abuse, Health Insurance Portability and Accountability Act (HIPAA) Privacy and Security, Partnership Code of Conduct, Sexual Harassment AB1825, Diversity, Equity & Inclusion (DEI), Cyber Security Awareness, etc. Mandatory training and other agency requirements are listed with specific due dates on the employee's training plan.
- c. All mandatory training is expected to be completed on or before the "required by" date and should be done during the employee's scheduled work hours. Employees will be paid their regular rates. Non-exempt employees must obtain prior written approval from their supervisor if training time will require overtime pay. Exempt employees may complete the training outside their regular scheduled hours, at their discretion, but will not receive any additional

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compensation or time off.

- d. Timely completion of training may be part of an employee's performance evaluation. Employees may not be eligible for raises, promotions, or other compensation until all required training is completed. Completion of required trainings does not guarantee raises, promotion, or other compensation or in any way alter the "at will" status of employment.
2. Recommended Trainings:
 - a. From time to time an employee's direct manager may recommend or assign specific trainings as a performance improvement activity or as part of an employee's professional development plan. If training is assigned, the employee's direct manager is expected to allow training time within normal work hours. If training is recommended, but not required by the direct manager, it is expected that the training will be completed on the employee's personal time.
3. Elective Training:
 - a. Partnership's LMS provides a library of professional courses on a variety of professional topics. Employees may, at their own discretion, take online courses for continuing education credit, for professional development, or personal interest at no cost. Employees choosing to take online courses at their own discretion, as electives, should do so on their own time and will not be compensated for their time.

C. Tuition and Certifications:

1. Guidelines for Tuition and/or Certification Pre-Approval:
 - a. Employee must be a regular full-time employee and have completed six (6) months of continuous employment.
 - b. Employee must take a job-related course, relevant to current job responsibilities or planned career progression.
 - c. Courses qualifying for reimbursement must be completed in an accredited educational institution. College, university, and business college courses are qualified under this program.
 - d. Prior to enrollment of courses, employee must complete a Tuition/Certification Program Approval Form (attachment C), obtain Director/Manager's review and signature approval, and turn into Training & Development for pre-approval. Form must be signed by Director/Manager and Training & Development.
 - 1) For each semester, term, or equivalent, a separate Tuition/Certification Program Approval Form will be required. Course titles and details must be attached to the form. T&D will provide the employee with the final approved Tuition/Certification Program Approval Form for processing through concur.
 - e. Partnership will reimburse according to policy HR506.

D. Continuing Education for Licensure Renewals:

1. Guidelines for Continuing Education for Licensure Renewals:
 - a. Employee must be a regular full-time employee; part-time employees (working less than 32 hours/week) may have license renewal on a prorated basis, based on the percentage of full-time of their usual schedule.
 - b. Continuing education and/or license is required to perform job duties.
 - c. Continuing education will be compensated as hours worked in accordance with applicable federal and state wage and hour regulations.
 - d. Prior to enrollment, employee must complete a Tuition/Certification Program Approval Form (attachment C) for all applicable continuing education units, obtain Director/Manager's signatures, and turn into Training & Development for pre-approval. Form must be signed and

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dated by Director/Manager and Training & Development.

- e. Continuing education units must not exceed the maximum reimbursement allowance and must be an approved course as outlined on the Board website as it pertains to each specific license. Training & Development will track completion.
- f. Copy of license to remain in employee's personnel file.

E. Reimbursement:

- 1. See policy HR506 for Employee Reimbursement.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES: 07/08/2015, 10/29/2018, 12/06/2022, 02/14/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR604		Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 1, 1997		Next Review Date: 01/01/2024 05/15/2025 Last Review Date: 01/01/2023 05/15/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE <input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE <input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney Sonja Bjork		Approval Date: 04/21/2022 05/15/2024	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

- A. Project lead: accountable for entire project, planning and organizing, strategizing
- B. Secondary: assistant to project lead, a major support role to project, contributes to overall operation of project
- C. Supporting: administrative/clerical support role to project

IV. ATTACHMENTS:

A. [Spot Bonus Form](#)

V. PURPOSE:

It is the policy of Partnership HealthPlan of California ([PartnershipHC](#)) to reward employees for their ideas that will save money or improve services. Employees will receive ~~cash awards~~ monetary rewards and/or half day off certificates established by [PartnershipHC](#) under the guidelines below.

VI. POLICY / PROCEDURE:

A. Funding Pool:

- 1. The source of funding for the employee rewards will be paid from a funding pool budgeted each fiscal year.

B. Part I: Monetary ~~Awards~~ rewards to recognize employees for extraordinary performance that goes beyond expected or required productivity; exceptional contributions in the performance of special projects of significant importance, organizing/implementing an innovation that improves efficiency, reduces costs, or assumption of additional workload for a period of time; for Ideas to Save Money or Improvement in Services:

- 1. Eligibility: All staff are eligible ~~for one reward per year, however additional rewards may be approved at the discretion of the CEO, excluding Department Head Directors (One award per year).~~
 - a. Awards typically range from \$100.00 - \$2000.00, ~~additional final amounts may will be approved at the discretion of the CEO.~~
 - a-b. Rewards should not be goal-related to the organizational goals determined by policy HR605, determined by tier structure below:
 - 1) ~~Tier A: Project Lead range between \$1,000.00 - \$2,000.00~~
 - 2) ~~Tier B: Secondary range between \$500.00 - \$900.00~~

Policy/Procedure Number: HR604		Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 1, 1997		Next Review Date: <u>01/01/202405/15/2025</u> Last Review Date: <u>01/01/202305/15/2024</u>	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- ~~3) Tier C: Supporting range between \$100.00 – \$400.00~~
- ~~2. Criteria: Measurable dollar savings~~
- ~~a. Tangible improvement in member or provider services~~
- 3.2. Once the department head has approved, please submit to HR for PAF generation and final approval from the CEO.
- ~~C. Part II: Monetary Awards for the Continuation of Insurance Premium Program (CIP) Bonus Program~~
- ~~1. Criteria: When a PHC representative identifies a member who qualifies for CIP~~
- ~~2. Award Amount: \$100.00 bonus per individual or \$200.00 per family~~
- D.C. Part III: ~~Reward for Special Performance~~ Time off Rewards
1. Eligibility: All staff are eligible excluding Associate Directors and above.
 2. Staff may use certificate(s) after their 90th day of employment.
 3. Reward:
 - a. ½ of scheduled day off with pay, not to exceed four (4) hours
 - b. 2 hours off with pay
 4. Criteria: Senior Director approves
 - a. 12-month period – January – December
 - b. Disbursement – There is not a requirement to give to each employee.
 - c. Each Department Head will annually receive two (2) ½ day off & two (2) 2 hour off certificates for every one (1) employee in their department to use at their discretion.
 - d. Certificates may be earned for the following:
 - 1) Caught Being Compliant
 - 2) IDEA Program
 - 3) Employee of the Quarter
 - 4) Employee of the Year
 5. All certificates issued in the current year must be used by June 30th of the following year.
 6. Special Performance Guidelines:
 - a. Exceptional financial savings
 - b. Exceptional performance
 - c. Cost savings event
 - d. Beyond the call of duty
 7. Certificates do not reflect any cash value and are not paid out at time of separation from PHCPartnership.
 8. Spot Bonus balances in ADP will reset to zero (0) on July 1st of each year.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:

08/04/2003, 07/15/2004, 09/14/2004, 01/19/2005, 03/16/2010, 02/23/2011, 07/09/2013, 01/05/2015, 03/23/2018, 05/30/2019, 12/10/2019, 06/15/202208/04/2003, 07/15/2004, 09/14/2004, 01/19/2005, 03/16/2010, 02/23/2011, 07/09/2013, 01/05/2015, 03/23/2018, 05/30/2019, 12/10/2019, 06/15/2022, 05/16/2024

PREVIOUSLY APPLIED TO: N/A

Policy/Procedure Number: HR604		Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 1, 1997		Next Review Date: 01/01/2024 05/15/2025 Last Review Date: 01/01/2023 05/15/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR604			Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 1, 1997		Next Review Date: 05/15/2025 Last Review Date: 05/15/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 05/15/2024	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

- A. Project lead: accountable for entire project, planning and organizing, strategizing
- B. Secondary: assistant to project lead, a major support role to project, contributes to overall operation of project
- C. Supporting: administrative/clerical support role to project

IV. ATTACHMENTS:

A. [Spot Bonus Form](#)

V. PURPOSE:

It is the policy of Partnership HealthPlan of California (Partnership) to reward employees for their ideas that will save money or improve services. Employees will receive monetary rewards and/or half day off certificates established by Partnership under the guidelines below.

VI. POLICY / PROCEDURE:

A. Funding Pool:

1. The source of funding for the employee rewards will be paid from a funding pool budgeted each fiscal year.

B. Part I: Monetary rewards to recognize employees for extraordinary performance that goes beyond expected or required productivity; exceptional contributions in the performance of special projects of significant importance, organizing/implementing an innovation that improves efficiency, reduces costs, or assumption of additional workload for a period of time:

1. Eligibility: All staff are eligible for one reward per year, however additional rewards may be approved at the discretion of the CEO.
 - a. Awards typically range from \$100.00 - \$2000.00, final amounts will be approved at the discretion of the CEO.
 - b. Rewards should not be related to the organizational goals determined by policy HR605.
2. Once the department head has approved, please submit to HR for PAF generation and final approval from the CEO.

Policy/Procedure Number: HR604		Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 1, 1997		Next Review Date: 05/15/2025 Last Review Date: 05/15/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

C. Part III: Time off Rewards

1. Eligibility: All staff are eligible excluding Associate Directors and above.
2. Staff may use certificate(s) after their 90th day of employment.
3. Reward:
 - a. ½ of scheduled day off with pay, not to exceed four (4) hours
 - b. 2 hours off with pay
4. Criteria: Senior Director approves
 - a. 12-month period – January – December
 - b. Disbursement – There is not a requirement to give to each employee.
 - c. Each Department Head will annually receive two (2) ½ day off & two (2) 2 hour off certificates for every one (1) employee in their department to use at their discretion.
 - d. Certificates may be earned for the following:
 - 1) Caught Being Compliant
 - 2) IDEA Program
 - 3) Employee of the Quarter
 - 4) Employee of the Year
5. All certificates issued in the current year must be used by June 30th of the following year.
6. Special Performance Guidelines:
 - a. Exceptional financial savings
 - b. Exceptional performance
 - c. Cost savings event
 - d. Beyond the call of duty
7. Certificates do not reflect any cash value and are not paid out at time of separation from Partnership.
8. Spot Bonus balances in ADP will reset to zero (0) on July 1st of each year.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:

08/04/2003, 07/15/2004, 09/14/2004, 01/19/2005, 03/16/2010, 02/23/2011, 07/09/2013, 01/05/2015, 03/23/2018, 05/30/2019, 12/10/2019, 06/15/2022, 05/16/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR605			Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: April 16, 2002		Next Review Date: 01/01/2024 06/17/2025 Last Review Date: 02/15/2023 06/17/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney <u>Sonja Bjork</u>			Approval Date: 02/15/2023	

RELATED POLICIES: N/A

IMPACTED DEPTS:

- A. All Departments

DEFINITIONS:

- A. **Executive Sponsor:** Assigned to an organization goal as a member of the Partnership HealthPlan of California (Partnership) executive team with formal authority and ownership for the process being improved.
- B. **Goal Owner-** Director or above whose departments will retain ownership of the work after the project is completed. Responsible for shaping the overall direction of the goal.
- C. **Goal Lead:** Assigned to lead an organizational goal by providing overall organization and goal management
- D. **Department Participant:** Assigned to participate in organization goals based on alignment with day-to-day departmental duties, subject matter expertise, and/or relevance of the goal to their usual area of responsibility.

I. ATTACHMENTS

~~—Org Goal Templates~~

A. Goals Charter Template

B. Org Goals Charter Change-Update Template

C. Org Goals Executive Summary and Project Close-out Report Template

II. PURPOSE:

To financially incentivize the management team as they identify, measure, and achieve goals that move the organization toward, and in alignment with, the principles of the Partnership's mission, vision, and strategic plan. The management incentive program is intended to promote collaborative working relationships and interdepartmental approaches that make Partnership a high-performing organization. It will also recognize and compensate those management team members who embrace this collaborative philosophy and whose contributions during the year help Partnership meet its annual strategic goals.

III. ELIGIBILITY:

- A. Employee must be in one of the following leadership classifications:
- 1. Supervisor of _____, or have at least one (1) direct report
 - 2. Manager of _____

Policy/Procedure Number: HR605		Lead Department: Human Resources
Policy/Procedure Title: Management Incentive Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy
Original Date: April 16, 2002	Next Review Date: <u>03/27/2025</u> 01/01/2024 Last Review Date:	

3. Associate Director of _____
4. Director of _____
5. Sr. Director of _____
6. Chief

B. Newly qualified employees must be employed on or before December 31 in a qualified position within the goal measurement period to be eligible to receive the incentive. The qualified employee must be in their new role at least six (6) months during the fiscal year (not calendar year). If the employee is hired or promoted into a qualified position after January 1st, they will be eligible to receive the incentive in the following measurement period.

IV. POLICY / PROCEDURE:

A. Goals and Metrics:

Eligible employees' incentive payment will be based on the completion of two areas:

1. **Organizational Goals:** Will align with Partnership's priorities within the strategic plan.
2. **Organizational Metrics:** A set of organizational key performance indicators (KPI) that help measure whether the organization is operating at a desired level

Eligible employees will be accountable for all Organizational ~~goals~~ Goals and all ~~organizational~~ Organizational metrics Metrics

B. Measurement of Goals and Metrics:

1. An employee's overall score will be based on the combined scores of goal completion and metric achievement.

Organizational Goals	50.00%
Organizational Metrics	50.00%
Total Possible	<u>100.00%</u>

2. Goals

- a. Each goal will receive an even number of points. For example, if there are five (5) Organizational ~~goals~~ Goals, each goal will be allotted 20% of the 50% possible of the Organizational ~~goal~~ Goal category.
- b. Each goal will be scored as either completed (100%), partially completed (50%), or incomplete (0%). Partial credit will be defined within each individual goal charter as applicable, and must be signed off/approved by Goal Owner, ~~and~~ Sponsor and Exec Team.

3. Metrics

- a. Each metric will receive an even number of points possible. For example, if there are five (5) Organizational ~~metrics~~ Metrics, each one will contribute 20% to the 50% possible for the achievement of the Organizational ~~metric~~ Metric category.
- b. Each metric will be scored as either completed (100%) or incomplete (0%). Partial credit will not be awarded for any metrics, unless approved by Exec Team, Goal Sponsor and Metric Reporting Owner.
4. All bonus eligible staff will receive the same score for organizational goals and organizational metrics.

C. Timelines and Approvals:

1. Measurement period is based on fiscal year (July 1 to June 30).
2. Goal development due dates:
 - a. **Organizational Goals:** Topic, scope, and high level deliverables are finalized by the Executive

Policy/Procedure Number: HR605		Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: April 16, 2002		Next Review Date: <u>03/27/2025</u> 01/01/2024 Last Review Date:	

team and the Goal Owner by March, prior to the start of a new fiscal year. ~~Full-Completed~~ goal charters and plans will receive Executive approval by June.

- b. Organizational Metrics: Will be defined and finalized by the Executive team by March, prior to the start of the new fiscal year.
3. Goal status and completion due dates:
 - a. Status updates on all goals are due at the end of each quarter. All updates will be submitted via Workfront and reviewed by the Executive Team.
 - a.b. All Organizational Goal milestones must be completed by June 30.
 - b.c. The Organizational Goal Executive Summary and Project Close-out Report and along with any additional supporting documentation must be complete-submitted by the end of June on the second Monday after the end of the fiscal year for review, presentation, and approval by the Executive Team.
4. CEO has final approval on all Organizational goals Goals and Organizational metrics Metrics.

D. Incentive Opportunity:

1. An eligible employee will have the opportunity to receive a percentage of their base salary in effect on June 30. Employees promoted or demoted from one level of management to another on or after January 1~~st~~ of the fiscal year but remain as management on June 30~~th~~ of the fiscal year, will have their management bonus paid at the bonus rate associated with their position on December 31~~st~~. Percentages are as follows:
 - Chiefs/Senior Directors: 8%
 - Directors/Associate Directors: 5%
 - Senior Managers/Managers: 3%
 - Supervisors: 1.5%
2. If a qualified employee is working a modified schedule, then the incentive payout base salary will be calculated based on that employee's annual hours worked.
3. Incentives for eligible employees hired after the start of the fiscal year will be prorated based on date of hire. Eligible employees hired with less than six (6) months in the incentive program (i.e. hired after December 31) will begin participation in the program at the start of the next fiscal year.

E. Incentive Payout:

1. The incentive payout will be calculated as follows:
 - a. Supervisor and above:
 - (Eligible %) x (Base Salary) x (% of Goals Completed + % of metrics met)
 - b. Notwithstanding anything stated above, if the CEO and Board determine during the budgeting process that it is not in the best interest of Partnership to provide incentives, all employees qualifying may receive zero (0) incentive payout.
2. Payment will be calculated within 60 days after fiscal year-end and after all appropriate reviews and sign-offs have been completed.
3. Eligible employees must be a current employee at the time normal payout occurs to receive payment.

V. REFERENCES: N/A

VI. DISTRIBUTION: PowerDMS

VII. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: CEO, Chiefs, Senior Directors, Directors, Associate Directors, Senior Managers, Managers

VIII. REVISION DATES: 05/27/2005, 04/30/2007, 05/27/2009, 06/13/2011, 08/17/2011, 07/16/2014, 09/12/2014, 03/13/2018, 07/22/2019, 06/11/2020, 10/6/2022, 02/15/2023, 06/17/2024~~08/07/2024~~

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR605			Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: April 16, 2002		Next Review Date: 08/07/2025 Last Review Date: 08/07/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: <i>Sonja Bjork</i>			Approval Date:	

RELATED POLICIES: N/A

IMPACTED DEPTS:

- A. All Departments

DEFINITIONS:

- A. **Executive Sponsor:** Assigned to an organization goal as a member of the Partnership HealthPlan of California (Partnership) executive team with formal authority and ownership for the process being improved.
- B. **Goal Owner-** Director or above whose departments will retain ownership of the work after the project is completed. Responsible for shaping the overall direction of the goal.
- C. **Goal Lead:** Assigned to lead an organizational goal by providing overall organization and goal management
- D. **Department Participant:** Assigned to participate in organization goals based on alignment with day-to-day departmental duties, subject matter expertise, and/or relevance of the goal to their usual area of responsibility.

I. ATTACHMENTS

- A. [Org Goals Charter Template](#)
- B. [Org Goals Charter Change Template](#)
- C. [Org Goals Executive Summary and Project Closeout Report Template](#)

II. PURPOSE:

To financially incentivize the management team as they identify, measure, and achieve goals that move the organization toward, and in alignment with, the principles of the Partnership's mission, vision, and strategic plan. The management incentive program is intended to promote collaborative working relationships and interdepartmental approaches that make Partnership a high-performing organization. It will also recognize and compensate those management team members who embrace this collaborative philosophy and whose contributions during the year help Partnership meet its annual strategic goals.

III. ELIGIBILITY:

- A. Employee must be in one of the following leadership classifications:
 - 1. Supervisor of _____, or have at least one (1) direct report
 - 2. Manager of _____
 - 3. Associate Director of _____

Policy/Procedure Number: HR605		Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: April 16, 2002		Next Review Date: 08/07/2025 Last Review Date: 08/07/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

4. Director of _____
5. Sr. Director of _____
6. Chief

B. Newly qualified employees must be employed on or before December 31 in a qualified position within the goal measurement period to be eligible to receive the incentive. The qualified employee must be in their new role at least six (6) months during the fiscal year (not calendar year). If the employee is hired or promoted into a qualified position after January 1, they will be eligible to receive the incentive in the following measurement period.

IV. POLICY / PROCEDURE:

A. Goals and Metrics:

Eligible employees' incentive payment will be based on the completion of two areas:

1. **Organizational Goals:** Will align with Partnership's priorities within the strategic plan.
2. **Organizational Metrics:** A set of organizational key performance indicators (KPI) that help measure whether the organization is operating at a desired level

Eligible employees will be accountable for all Organizational Goals and all Organizational Metrics

B. Measurement of Goals and Metrics:

1. An employee's overall score will be based on the combined scores of goal completion and metric achievement.

Organizational Goals	50.00%
Organizational Metrics	50.00%
Total Possible	<u>100.00%</u>

2. Goals

- a. Each goal will receive an even number of points. For example, if there are five (5) Organizational Goals, each goal will be allotted 20% of the 50% possible of the Organizational Goal category.
- b. Each goal will be scored as either completed (100%), partially completed (50%), or incomplete (0%). Partial credit will be defined within each individual goal charter as applicable, and must be signed off/approved by Goal Owner, Sponsor and Exec Team.

3. Metrics

- a. Each metric will receive an even number of points possible. For example, if there are five (5) Organizational Metrics, each one will contribute 20% to the 50% possible for the achievement of the Organizational Metric category.
- b. Each metric will be scored as either completed (100%) or incomplete (0%). Partial credit will not be awarded for any metrics, unless approved by Exec Team, Goal Sponsor and Metric Reporting Owner.
4. All bonus eligible staff will receive the same score for organizational goals and organizational metrics.

C. Timelines and Approvals:

1. Measurement period is based on fiscal year (July 1 to June 30).
2. Goal development due dates:
 - a. **Organizational Goals:** Topic, scope, and high level deliverables are finalized by the Executive team and the Goal Owner by March, prior to the start of a new fiscal year. Completed goal charters and plans will receive Executive approval by June.

Policy/Procedure Number: HR605		Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: April 16, 2002		Next Review Date: 08/07/2025 Last Review Date: 08/07/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- b. **Organizational Metrics:** Will be defined and finalized by the Executive team by March, prior to the start of the new fiscal year.
3. Goal status and completion due dates:
 - a. Status updates on all goals are due at the end of each quarter. All updates will be submitted via Workfront and reviewed by the Executive Team.
 - b. All Organizational Goal milestones must be completed by June 30.
 - c. The Organizational Goal Executive Summary and Project Close-out Report along with any additional supporting documents must be submitted on the second Monday after the end of the fiscal year for review, presentation, and approval by the Executive Team.
4. CEO has final approval on all Organizational Goals and Organizational Metrics.

D. Incentive Opportunity:

1. An eligible employee will have the opportunity to receive a percentage of their base salary in effect on June 30. Employees promoted or demoted from one level of management to another on or after January 1 of the fiscal year but remain as management on June 30 of the fiscal year, will have their management bonus paid at the bonus rate associated with their position on December 31.
Percentages are as follows:
 - Chiefs/Senior Directors: 8%
 - Directors/Associate Directors: 5%
 - Senior Managers/Managers: 3%
 - Supervisors: 1.5%
2. If a qualified employee is working a modified schedule, then the incentive payout base salary will be calculated based on that employee's annual hours worked.
3. Incentives for eligible employees hired after the start of the fiscal year will be prorated based on date of hire. Eligible employees hired with less than six (6) months in the incentive program (i.e. hired after December 31) will begin participation in the program at the start of the next fiscal year.

E. Incentive Payout:

1. The incentive payout will be calculated as follows:
 - a. Supervisor and above:
 - (Eligible %) x (Base Salary) x (% of Goals Completed + % of metrics met)
 - b. Notwithstanding anything stated above, if the CEO and Board determine during the budgeting process that it is not in the best interest of Partnership to provide incentives, all employees qualifying may receive zero (0) incentive payout.
2. Payment will be calculated within 60 days after fiscal year-end and after all appropriate reviews and sign-offs have been completed.
3. Eligible employees must be a current employee at the time normal payout occurs to receive payment.

V. REFERENCES: N/A

VI. DISTRIBUTION: PowerDMS

VII. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: CEO, Chiefs, Senior Directors, Directors, Associate Directors, Senior Managers, Managers

VIII. REVISION DATES: 05/27/2005, 04/30/2007, 05/27/2009, 06/13/2011, 08/17/2011, 07/16/2014, 09/12/2014, 03/13/2018, 07/22/2019, 06/11/2020, 10/6/2022, 02/15/2023, 08/07/2024

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR606			Lead Department: Human Resources	
Policy/Procedure Title: Employee Award Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 07/18/2003		Next Review Date: 01/01/2024 08/05/2025 Last Review Date: 06/21/2023 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney Sonja Bjork			Approval Date: 06/21/2023	

I. RELATED POLICIES:

A. HR215

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

A. N/A

V. PURPOSE:

The purpose is to provide employees with a monetary award to recognize their contributions to our mission, providing quality healthcare, achieving operational excellence, maintaining strong financial stewardship, and to building strong community partnerships.

VI. POLICY / PROCEDURE:

A. Guidelines

1. Award approval is based on the judgment of the CEO, with recommendations from the CFO and Senior Director of Human Resources.
2. The amount of the award can vary from year to year.
3. 90-day introductory, temporary, and contract employees are not eligible to participate in the award program.
4. Part-time and full-time status will be treated the same.
5. The amount of the award will be based on length of service with Partnership as of April 30th of every year.
6. Employees who are rehired within 90-days of separation will retain their original date of hire for use in calculating this award.

B. Award Payout

1. The award amount (represented as gross bonus before taxes) is based on the employee's years of service with Partnership. Additional amounts may be approved at the discretion of the CEO.
 - a. 90 days, but less than two (2) years - \$100.00
 - b. Two (2) years and up - \$100.00 per each completed year of service, not to exceed \$1,000.00

C. Criteria

1. Partnership will assess the financial stability of the organization on an annual basis to determine if a

Policy/Procedure Number: HR606		Lead Department: Human Resources	
Policy/Procedure Title: Employee Award Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 07/18/2003		Next Review Date: 01/01/202408/05/2025 Last Review Date: 06/21/202308/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

bonus award will be provided to employees. If the CEO and Board determine during the budgeting process that it is not in the best interest of Partnership to provide incentives, employees may not receive an award.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS (restricted)

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: CEO, CFO, Senior Director of Human Resources

X. REVISION DATES:

03/22/2011, 4/23/2018, 06/10/2020, 06/21/2023, 08/05/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR606			Lead Department: Human Resources	
Policy/Procedure Title: Employee Award Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 07/18/2003		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 08/08/2024	

I. RELATED POLICIES:

A. [HR215](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

A. N/A

V. PURPOSE:

The purpose is to provide employees with a monetary award to recognize their contributions to our mission, providing quality healthcare, achieving operational excellence, maintaining strong financial stewardship, and to building strong community partnerships.

VI. POLICY / PROCEDURE:

A. Guidelines

1. Award approval is based on the judgment of the CEO, with recommendations from the CFO and Senior Director of Human Resources.
2. The amount of the award can vary from year to year.
3. 90-day introductory, temporary, and contract employees are not eligible to participate in the award program.
4. Part-time and full-time status will be treated the same.
5. The amount of the award will be based on length of service with Partnership as of April 30th of every year.
6. Employees who are rehired within 90-days of separation will retain their original date of hire for use in calculating this award.

B. Award Payout

1. The award amount (represented as gross bonus before taxes) is based on the employee's years of service with Partnership. Additional amounts may be approved at the discretion of the CEO.
 - a. 90 days, but less than two (2) years - \$100.00
 - b. Two (2) years and up - \$100.00 per each completed year of service, not to exceed \$1,000.00

C. Criteria

1. Partnership will assess the financial stability of the organization on an annual basis to determine if a

Policy/Procedure Number: HR606		Lead Department: Human Resources	
Policy/Procedure Title: Employee Award Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 07/18/2003		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

bonus award will be provided to employees. If the CEO and Board determine during the budgeting process that it is not in the best interest of Partnership to provide incentives, employees may not receive an award.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS (restricted)

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: CEO, CFO, Senior Director of Human Resources

X. REVISION DATES:

03/22/2011, 4/23/2018, 06/10/2020, 06/21/2023, 08/05/2024

PREVIOUSLY APPLIED TO:

N/A

**PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE**

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: August 4, 2003		Next Review Date: 01/01/2023 Last Review Date: 06/21/2022	
Applies to:	<input type="checkbox"/> Medi-Cal <input type="checkbox"/> Healthy Kids <input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI <input type="checkbox"/> P & T <input type="checkbox"/> QUAC		
	<input type="checkbox"/> OPERATIONS <input type="checkbox"/> EXECUTIVE <input type="checkbox"/> COMPLIANCE <input type="checkbox"/> DEPARTMENT		
Approving Entities:	<input type="checkbox"/> BOARD <input type="checkbox"/> COMPLIANCE <input type="checkbox"/> FINANCE <input type="checkbox"/> PAC		
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO <input type="checkbox"/> CREDENTIALING <input type="checkbox"/> DEPT. DIRECTOR/OFFICER		
Approval Signature: Liz Gibboney		Approval Date: 06/21/2022	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. **Working Together Value Statement:** We want our employees, members, and health care providers to feel valued, respected, and involved in our endeavors. We aspire to provide high-quality service while meeting the needs of our community and employees.

IV. ATTACHMENTS:

- A. [Employee of the Quarter Nomination Form](#)
 B. [Employee of the Year Nomination Form](#)

V. PURPOSE:

It is the policy of Partnership HealthPlan of California (PHC) to reward one employee per region nominated for Employee of the Quarter and Employee of the Year, and one employee per department for WOW awards, for exceptional and outstanding performance and adhering to PHC's "Working Together Value Statement."

VI. POLICY / PROCEDURE:

A. Employee of the Quarter Nomination Guidelines:

1. Nominations are open to all employees who have been employed for the entire quarter, with the exception of directors, managers and supervisors;
2. All employees (including directors/managers/supervisors) may nominate an employee. You may nominate employees outside of your own department;
3. Nominee has practiced the "Working Together Value Statement;"
4. Nominee has excelled in areas beyond his/her job duties;
5. Nominee shows dedication, creativity, is a team player, and a problem solver;
6. Nominee has an excellent attendance record for the quarter;
7. After reviewing the criteria for Employee of the Quarter, complete and submit the nomination form (attachment A);
8. Human Resources (HR) will review the nominations and submit them to the department head for review.
- 8.9. Once department head has reviewed, the nominations forms will go to the PHC Executive team for final vote by secret ballot. The Executive team will make the final decision through secret ballot;
- 9.10. The Employee of the Quarter winner will be announced on PHC4Me and at an upcoming Town Hall;

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10.11. The employee elected for “Employee of the Quarter” will receive \$~~50250~~0.00, two (2) hour spot bonus, a plaque, ~~and~~ a placard

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: August 4, 2003		Next Review Date: 01/01/2023 Last Review Date: 06/21/2022	
Applies to:	<input type="checkbox"/> Medi-Cal <input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	

for the Employee of the Quarter parking space, and will automatically be entered into the running for Employee of the Year.

~~11,12.~~ All of the nominees, with the exception of the winner, will receive an emailed certificate and their nomination form. ~~automatically be nominated for the WOW award for department head approval. WOW award recipients will be announced on PHC4Me and an upcoming Town Hall. (See WOW award information in section C.)~~

B. Employee of the Year Nomination Guidelines:

- ~~1. All of the organization wide Employee of the Quarter winners will be entered into the running for the Employee of the Year for a total of eight (8) – no new nominees.~~
- ~~2. Department leadership of the Employee of the Quarters will have an opportunity to provide additional information to the nominee's form~~
- ~~3. A list of the nominees, along with a summary from their announcement, will be sent out to all staff to vote.~~
- ~~4. The staff survey will represent one (1) vote towards the top nominee.~~
- ~~1. Nominations are open to all employees who have been employed for the entire year, with the exception of the directors and managers;~~
- ~~2. Nominee has excelled in some area of his/her job duties during the year;~~
- ~~3. Nominee has shown dedication, creativity and/or problem solving by example, for his/her co-workers, fellow employees, providers, or members over the past year;~~
- ~~4. Nominee has practiced the "Working Together Value Statement;"~~
- ~~5. After reviewing the criteria for Employee of the Year, complete the nomination form (attachment B), then print and submit it to your department director;~~
- ~~6. Employees must nominate a co-worker from their own department only;~~
- ~~7. Each department director and their manager(s) will review the nominations and will select one (1) employee to be the nominee from their department;~~
- ~~8. In the bottom section of the nomination form, the director will have the option to add relevant information or highlight other accomplishments of the nominee before submitting the nomination to HR;~~
- ~~9. The director or manager will then submit their nomination to HR;~~
- ~~10. The four (4) Employee of the Quarter winners from the current year will be automatically entered as nominees for Employee of the Year, along with the departmental nominees;~~
- ~~11,5.~~ The nominees will then go to the Executive team for final vote by secret ballot and the __ – winner will be chosen;
- ~~12. The four (4) Employees of the Quarter and the department nominees will all be announced at the Employee of the Year event and will receive a certificate;~~
- ~~13. The top three (3) nominees will also receive two (2) Spot Bonus hours added to their ADP profile;~~
- ~~14,6.~~ The employee elected for "Employee of the Year" will receive \$500.00, four (4) Spot Bonus hours added to their ADP profile, a plaque, their picture on display, and a placard for the Employee of the Year parking space.

C. ~~What Outstanding Work (WOW) Award Nomination Guidelines~~

- ~~1. Employees who are nominated for Employee of the Quarter but are not selected as the winner will automatically be WOW award nominees.~~
- ~~2. Department leadership may approve or nominate one (1) employee within their respective department each quarter;~~
- ~~3. Nominees have excelled in one or more areas of our Strategic Plan (High Quality Healthcare, Operational Excellence, Financial Stewardship);~~
- ~~4. WOW Award winners will be announced on PHC4Me and at the quarterly Town Hall meetings;~~
- ~~5. The employees selected for a "WOW Award" will receive two (2) Spot Bonus hours added to their ADP profile and a WOW Award Pin.~~

Commented [RV1]: Are we sure we want to move forward with this? I thought we wanted to eliminate as much as possible from the department head and just have them review them... we could potentially run into really long nomination forms...

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. [SharePointPowerDMS](#)

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Managers, Directors, Executive Team

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: August 4, 2003		Next Review Date: 01/01/2023 Last Review Date: 06/21/2022	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

X. **REVISION DATES:**
 08/09/2007, 02/03/2011, 02/05/2014, 12/17/2018, 06/25/2019, 01/30/2020, 06/11/2020, 06/21/2022

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR608			Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: August 4, 2003		Next Review Date: 04/13/2025 Last Review Date: 04/13/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 04/13/2024	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. **Working Together Value Statement:** We want our employees, members, and health care providers to feel valued, respected, and involved in our endeavors. We aspire to provide high-quality service while meeting the needs of our community and employees.

IV. ATTACHMENTS:

A. [Employee of the Quarter Nomination Form](#)

B. [Employee of the Year Nomination Form](#)

V. PURPOSE:

It is the policy of Partnership HealthPlan of California (PHC) to reward one employee per region nominated for Employee of the Quarter and Employee of the Year for exceptional and outstanding performance and adhering to PHC's "Working Together Value Statement."

VI. POLICY / PROCEDURE:

A. Employee of the Quarter Nomination Guidelines:

1. Nominations are open to all employees who have been employed for the entire quarter, with the exception of directors, managers and supervisors;
2. All employees (including directors/managers/supervisors) may nominate an employee. You may nominate employees outside of your own department;
3. Nominee has practiced the "Working Together Value Statement;"
4. Nominee has excelled in areas beyond his/her job duties;
5. Nominee shows dedication, creativity, is a team player, and a problem solver;
6. Nominee has an excellent attendance record for the quarter;
7. After reviewing the criteria for Employee of the Quarter, complete and submit the nomination form (attachment A);
8. Human Resources (HR) will review the nominations and submit them to the department head for review.
9. Once department head has reviewed, the nominations forms will go to the PHC Executive team for final vote by secret ballot.
10. The Employee of the Quarter winner will be announced on PHC4Me;
11. The employee elected for "Employee of the Quarter" will receive \$500.00, two (2) hour spot bonus, a

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: August 4, 2003		Next Review Date: 04/13/2025 Last Review Date: 04/13/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

plaque, a placard for the Employee of the Quarter parking space, and will automatically be entered into the running for Employee of the Year.

12. All of the nominees, with the exception of the winner, will receive an emailed certificate and their nomination form.
- B. Employee of the Year Nomination Guidelines:
1. All of the organization wide Employee of the Quarter winners will be entered into the running for the Employee of the Year for a total of eight (8) – no new nominees.
 2. Department leadership of the Employee of the Quarters will have an opportunity to provide additional information to the nominee’s form
 3. A list of the nominees, along with a summary from their announcement, will be sent out to all staff to vote.
 4. The staff survey will represent one (1) vote towards the top nominee.
 5. The nominees will then go to the Executive team for final vote by secret ballot and the winner will be chosen;
 6. The employee elected for “Employee of the Year” will receive \$500.00, four (4) Spot Bonus hours added to their ADP profile, a plaque, and a placard for the Employee of the Year parking space.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Managers, Directors, Executive Team

X. REVISION DATES:

08/09/2007, 02/03/2011, 02/05/2014, 12/17/2018, 06/25/2019, 01/30/2020, 06/11/2020, 06/21/2022,04/13/2024

PREVIOUSLY APPLIED TO: N/A

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: November 12, 2003		Next Review Date: 01/01/2024 08/05/2025 Last Review Date: 06/30/2023 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE <input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE <input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney Sonja Bjork		Approval Date: 06/21/2022	

I. RELATED POLICIES:

- A. [HR706a](#)
- B. [HR706b](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

- A. [Cultural Diversity FAQ](#)

V. PURPOSE:

To establish a uniform process for holiday schedules and pay.

VI. POLICY / PROCEDURE:

It is the intent of Partnership HealthPlan of California (~~PHC~~[Partnership](#)) to provide a consistent and uniform process for holiday hours and pay.

A. Holiday Schedule:

1. All employees are eligible for holiday pay immediately upon hire. A regular full-time employee, who works (40) hours per week, shall be paid eight (8) hours pay for each scheduled holiday. Employees working less than 40 hours per week will receive holiday pay for all scheduled holidays based on the 8 hours prorated in proportion to their part-time schedule. See example below:

Scheduled Hours Per Week	Hours Compared to Full Time
20 hours	20 hours ÷ 40 hours = ½ x 8 hours = 4 hours
30 hours	30 hours ÷ 40 hours = ¾ x 8 hours = 6 hours

2. Non-exempt employees who work a ~~Partnership PHC~~-observed holiday will receive their straight-time rate of pay (not overtime rate) for hours actually worked on the holiday, plus the holiday pay or be given another regular day off to make up for the worked paid holiday.
3. If a ~~Partnership PHC~~-observed holiday falls on Sunday, the following Monday will be observed as the holiday. Any holiday falling on Saturday will be observed on the preceding Friday.
4. For exempt employees on 9/80 work schedule, if a holiday falls on an employee's flex day, the employee is entitled to take an additional eight (8) hour day off within the same pay period that the holiday occurs. See policy HR706a for more information.

5. For non-exempt employees on 9/80 work schedule, if a holiday falls on an employee's flex day, the employee is entitled to take an additional eight (8) hour day off within the same work week that the holiday occurs. See policy HR706b for more information.
 6. Employees who are on leave of absence are not eligible for holidays or holiday pay that falls during their leave of absence.
- B. Cultural Diversity Holiday:
1. In an effort to recognize our multi-cultural workforce, Partnership PHC is providing staff with an 8 hour Cultural Diversity Holiday (CDH). This day must be used for religious or cultural holidays, employee birthdays, or other state or federal holiday during which Partnership PHC remains open.
 - a. Employees will receive CDH hours on January 1st each calendar year.
 - b. New hires are eligible after completing 90 days of employment, regardless of whether their introductory period has been completed or extended. New employees hired on or after October 1st will receive these hours on January 1st of the following year.
 - c. Employees must designate a date on which they will use the day in ADP with advance approval from their supervisor and cannot be changed until the following year. If it is not used on the original designated date, it will be forfeited.
 - d. The CDH must be taken before the end of the calendar year. Unused hours will not rollover into the next calendar year and will not be paid out upon separation of employment.
 - e. The CDH will be prorated in accordance to the Holiday Schedule Pay Guidelines in Section VI, A.
 - f. The CDH must be used in full day increments (8 hours max).
 - g. The CDH hours cannot be included with PTO Cash Out.
- C. Temporary Employees:
- a. Full Time and Part Time Temps on Partnership PHC Payroll are not eligible for Partnership PHC holidays.
 - b. Temporary Agency employees are not eligible for Partnership PHC holidays.
- D. Partnership PHC Holidays:
1. Partnership PHC observes the following holidays:
 - a. New Year's Day
 - b. Martin Luther King Day
 - c. Presidents' Day
 - d. Memorial Day
 - e. Independence Day
 - f. Labor Day
 - g. Thanksgiving Day
 - h. Day after Thanksgiving
 - i. Christmas Eve
 - j. Christmas Day

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. SharePoint/PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

04/04/2005, 11/05/2009, 09/26/2013, 02/03/2014, 03/23/2018, 05/16/2022, 08/05/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR610			Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: November 12, 2003		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date:	

I. RELATED POLICIES:

- A. [HR706a](#)
- B. [HR706b](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

- A. [Cultural Diversity FAQ](#)

V. PURPOSE:

To establish a uniform process for holiday schedules and pay.

VI. POLICY / PROCEDURE:

It is the intent of Partnership HealthPlan of California (Partnership) to provide a consistent and uniform process for holiday hours and pay.

A. Holiday Schedule:

1. All employees are eligible for holiday pay immediately upon hire. A regular full-time employee, who works (40) hours per week, shall be paid eight (8) hours pay for each scheduled holiday. Employees working less than 40 hours per week will receive holiday pay for all scheduled holidays based on the 8 hours prorated in proportion to their part-time schedule. See example below:

Scheduled Hours Per Week	Hours Compared to Full Time
20 hours	$20 \text{ hours} \div 40 \text{ hours} = \frac{1}{2} \times 8 \text{ hours} = 4 \text{ hours}$
30 hours	$30 \text{ hours} \div 40 \text{ hours} = \frac{3}{4} \times 8 \text{ hours} = 6 \text{ hours}$

2. Non-exempt employees who work a Partnership observed holiday will receive their straight-time rate of pay (not overtime rate) for hours actually worked on the holiday, plus the holiday pay or be given another regular day off to make up for the worked paid holiday.
3. If a Partnership observed holiday falls on Sunday, the following Monday will be observed as the holiday. Any holiday falling on Saturday will be observed on the preceding Friday.
4. For exempt employees on 9/80 work schedule, if a holiday falls on an employee's flex day, the employee is entitled to take an additional eight (8) hour day off within the same pay period that the holiday occurs. See policy HR706a for more information.

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: November 12, 2003		Next Review Date: 01/01/2024 Last Review Date: 06/30/2023	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

5. For non-exempt employees on 9/80 work schedule, if a holiday falls on an employee's flex day, the employee is entitled to take an additional eight (8) hour day off within the same work week that the holiday occurs. See policy HR706b for more information.
 6. Employees who are on leave of absence are not eligible for holidays or holiday pay that falls during their leave of absence.
- B. Cultural Diversity Holiday:
1. In an effort to recognize our multi-cultural workforce, Partnership is providing staff with an 8 hour Cultural Diversity Holiday (CDH). This day must be used for religious or cultural holidays, employee birthdays, or other state or federal holiday during which Partnership remains open.
 - a. Employees will receive CDH hours on January 1st each calendar year.
 - b. New hires are eligible after completing 90 days of employment, regardless of whether their introductory period has been completed or extended. New employees hired on or after October 1st will receive these hours on January 1st of the following year.
 - c. Employees must designate a date on which they will use the day in ADP with advance approval from their supervisor and cannot be changed until the following year. If it is not used on the original designated date, it will be forfeited.
 - d. The CDH must be taken before the end of the calendar year. Unused hours will not rollover into the next calendar year and will not be paid out upon separation of employment.
 - e. The CDH will be prorated in accordance to the Holiday Schedule Pay Guidelines in Section VI, A.
 - f. The CDH must be used in full day increments (8 hours max).
 - g. The CDH hours cannot be included with PTO Cash Out.
- C. Temporary Employees:
- a. Full Time and Part Time Temps on Partnership Payroll are not eligible for Partnership holidays.
 - b. Temporary Agency employees are not eligible for Partnership holidays.
- D. Partnership Holidays:
1. Partnership observes the following holidays:
 - a. New Year's Day
 - b. Martin Luther King Day
 - c. Presidents' Day
 - d. Memorial Day
 - e. Independence Day
 - f. Labor Day
 - g. Thanksgiving Day
 - h. Day after Thanksgiving
 - i. Christmas Eve
 - j. Christmas Day

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:
04/04/2005, 11/05/2009, 09/26/2013, 02/03/2014, 03/23/2018, 05/16/2022, 08/05/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR701			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/2025 ⁴ Last Review Date: 03/17/2023 11/01/2023 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: <i>Liz Gibboney</i> <i>Sonja Bjork</i>			Approval Date: 03/17/2023	

I. RELATED POLICIES:

- A. [HR111](#)
- B. [HR702](#)
- C. [HR703](#)
- D. [HR704](#)
- E. [HR704a](#)
- F. [HR706a](#)
- G. [HR709](#)
- H. [HR710](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. N/A

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide [Managers/Supervisors/Leadership](#) with appropriate guidelines for administering Partnership HealthPlan of California's (Partnership) Paid Time Off Program.

VI. POLICY / PROCEDURE:

- A. Partnership provides regular full-time and regular part-time employees with a Paid Time Off (PTO) program. A PTO program allows greater flexibility in the use of time. ~~PTO hours may be used for vacation, short-term illness, family illness or emergencies, religious observances, preventative health and dental care, and personal business.~~ Employees are eligible to use their PTO at the completion of 90 days of employment, regardless of whether their introductory period has been completed or extended. Partnership encourages all eligible employees to utilize their Paid Time Off benefits.
- B. PTO is accrued based on hours paid, excluding overtime in excess of 80 hours. PTO begins accruing from date of hire.
- C. In the event that available PTO is not used by the end of the calendar year, employees may carry unused time off into the next calendar year. If the total amount of unused PTO reaches a "cap", further accrual of PTO will stop. When an employee uses accrued PTO and brings the available amount below the cap, accrual will begin again.

Policy/Procedure Number: HR701		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/20254 Last Review Date: 03/17/2023 11/01/20243	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- D. Normally, PTO must be arranged with your manager/supervisor in advance. Please submit an electronic time off request via ADP Portal.
- E. When an employee does not have enough PTO to cover a time off request and must also use Leave Without Pay (LWOP), leadership should consult with HR before approving the time off if the LWOP totals 5 or more days.
- F. When an employee is within 90 days of hire and is ineligible to use PTO, leadership should consult with HR before approving the time off if the LWOP totals 5 or more days.
- G. PTO requests for non-exempt employees must be taken in minimum increments of at least 15 minutes. Exempt employees must take PTO in one-hour increments, using a minimum of two hours on a particular workday, with the exception of the one (1) hour for holiday make-up time for 9/80 schedules, per policy HR706.
- H. Employees will not forfeit accrued and unused PTO.
- I. Terminated employees will receive payment for unused accrued ~~but unused~~ PTO in accordance with applicable laws.
- J. Employees may integrate any unused Paid Time Off with Sick Leave in accordance with the Sick Leave program – policy HR 710 and Catastrophic Leave in accordance with the Catastrophic Leave Program – policy HR704.
- K. Partnership may require a health care provider's certification or other verification on the basis for using unscheduled PTO.
- L. Excessive use of unscheduled PTO may result in discipline up to and including termination.

Annual Paid Time Off Benefits Accrual Schedule				
Fulltime (80 Hours Per Pay Period)				
<u>Years of Service</u>	<u>Accrual Benefits</u>	<u>Annual Accrual</u>		<u>PTO CAP</u>
		<u>Hours Per Year</u>	<u>Days Per Year</u>	
0 through 4 years	6.46155 3077 hrs	168138 hrs per year	2147.25 days per year	336 hrs
5 through 9 years	8.00006 8462 hrs	208178 hrs per year	2622.25 days per year	416 hrs
10+ years over	9.53858 3846 hrs	248218 hrs per year	3127.25 days per year	496 hrs
Annual Paid Time Off Benefits Accrual Schedule (Senior Directors)				
0 through 4 years	8.00006 8462 hrs	208178 hrs per year	2622.25 days per year	416 hrs
5 through 9 years	9.53858 3846 hrs	248218 hrs per year	3127.25 days per year	496 hrs
10+ years over	11.07699 9231 hrs	288258 hrs per year	3632.25 days per year	576 hrs

Policy/Procedure Number: HR701		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/2025 4 Last Review Date: 03/17/2023 11/01/2024 3	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

Annual Paid Time Off Benefits Accrual Schedule (CEO/CMO/CFO/CIO/COO/CAO Chiefs)				
0 through 4 years	9.53858.3846 hrs	248218 hrs per year	3127.25 days per year	496 hrs
5 through 9 years	11.07699.9231 hrs	288258 hrs per year	year	576 hrs
10+ years over	12.615411.4615 hrs	328298 hrs per year	3632.25 days per year	656 hrs
			4137.25 days per year	

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll, Supervisors, Managers, Directors

X. REVISION DATES:

08/25/2005, 01/13/2010, 06/27/2010, 06/13/2013, 6/19/2015, 2/4/2019, 05/30/2019, 05/11/2022, 03/17/2023, [11/01/2023](#)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR701			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 01/01/2024	

I. RELATED POLICIES:

- A. [HR111](#)
- B. [HR702](#)
- C. [HR703](#)
- D. [HR704](#)
- E. [HR704a](#)
- F. [HR706a](#)
- G. [HR710](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. PTO: Bank of hours that employees can use as needed.

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide Leadership with appropriate guidelines for administering Partnership HealthPlan of California's (Partnership) Paid Time Off Program.

VI. POLICY / PROCEDURE:

- A. Partnership provides regular full-time and regular part-time employees with a Paid Time Off (PTO) program. A PTO program allows greater flexibility in the use of time. Employees are eligible to use their PTO at the completion of 90 days of employment, regardless of whether their introductory period has been completed or extended. Partnership encourages all eligible employees to utilize their Paid Time Off benefits.
- B. PTO is accrued based on hours paid, excluding overtime in excess of 80 hours. PTO begins accruing from date of hire.
- C. In the event that available PTO is not used by the end of the calendar year, employees may carry unused time off into the next calendar year. If the total amount of unused PTO reaches a "cap", further accrual of PTO will stop. When an employee uses accrued PTO and brings the available amount below the cap, accrual will begin again.
- D. Normally, PTO must be arranged with your manager/supervisor in advance. Please submit an electronic time off request via ADP Portal.

Policy/Procedure Number: HR701		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- E. When an employee does not have enough PTO to cover a time off request and must also use Leave Without Pay (LWOP), leadership should consult with HR before approving the time off if the LWOP totals 5 or more days.
- F. When an employee is within 90 days of hire and is ineligible to use PTO, leadership should consult with HR before approving the time off if the LWOP totals 5 or more days.
- G. PTO requests for non-exempt employees must be taken in minimum increments of at least 15 minutes. Exempt employees must take PTO in one-hour increments, using a minimum of two hours on a particular workday, with the exception of the one (1) hour for holiday make-up time for 9/80 schedules, per policy HR706.
- H. Employees will not forfeit accrued and unused PTO.
- I. Terminated employees will receive payment for unused accrued PTO in accordance with applicable laws.
- J. Employees may integrate any unused Paid Time Off with Sick Leave in accordance with the Sick Leave program – policy HR 710 and Catastrophic Leave in accordance with the Catastrophic Leave Program – policy HR704.
- K. Partnership may require a health care provider's certification or other verification on the basis for using unscheduled PTO.
- L. Excessive use of unscheduled PTO may result in discipline up to and including termination.

Annual Paid Time Off Benefits Accrual Schedule				
Fulltime (80 Hours Per Pay Period)				
<u>Years of Service</u>	<u>Accrual Benefits</u>	<u>Annual Accrual</u>		<u>PTO CAP</u>
		<u>Hours Per Year</u>	<u>Days Per Year</u>	
0 through 4 years	6.4615 hrs	168 hrs per year	21 days per year	336 hrs
5 through 9 years	8.0000 hrs	208 hrs per year	26 days per year	416 hrs
10+ years over	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
Annual Paid Time Off Benefits Accrual Schedule (Senior Directors)				
0 through 4 years	8.0000 hrs	208 hrs per year	26 days per year	416 hrs
5 through 9 years	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
10+ years over	11.0769 hrs	288 hrs per year	36 days per year	576 hrs
Annual Paid Time Off Benefits Accrual Schedule (Chiefs)				
0 through 4 years	9.5385 hrs	248 hrs per year	31 days per year	496 hrs
5 through 9 years	11.0769 hrs	288 hrs per year	36 days per year	576 hrs
10+ years over	12.6154 hrs	328 hrs per year	41 days per year	656 hrs

VII. REFERENCES:

A. N/A

Policy/Procedure Number: HR701		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/01/1994		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll, Supervisors, Managers, Directors

X. REVISION DATES:

08/25/2005, 01/13/2010, 06/27/2010, 06/13/2013, 6/19/2015, 2/4/2019, 05/30/2019, 05/11/2022, 03/17/2023, 01/01/2024.

- **PREVIOUSLY APPLIED TO:** N/A Summary of changes:
 - Updated definitions for full-time and part-time remote work
 - Added section F.4.

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR702			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off Cash-Out Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/11/2015		Next Review Date: 08/05/2025 01/01/2024 Last Review Date: 10/19/2023 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> PAC
Approval Signature: Sonja Bjork			Approval Date: 10/26/2023	

I. RELATED POLICIES:

A. [HR701](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

A. [Paid Time Off Cash-Out Election Form](#)

V. PURPOSE:

Although Partnership HealthPlan of California (~~PHC~~[Partnership](#)) encourages our employees to take time off away from work in order to have a more balanced lifestyle, [Partnership](#) ~~PHC~~ offers a Paid Time Off (PTO) Cash-Out option for eligible employees. This program is intended to provide you with more flexibility in utilizing your time off benefits.

VI. POLICY / PROCEDURE:

A. Eligibility:

- ~~1. Benefit-eligible employees with one (1) year of employment who accrue PTO. Employee must have been employed by Partnership for at least one year with a date of hire falling on or before December 30 of the previous year.~~
- ~~2. Employee will have 80 hours of Paid Time Off (PTO) accumulated as of December 31 of the current year.~~
- ~~3. Employee must submit election form prior to December 31 of the current year.~~

B. Procedure:

1. An election period will be held each year beginning with annual open enrollment and prior to December 31, during which time you will have the opportunity to make an irrevocable election to cash out PTO hours that are scheduled to accrue in the next calendar year. You may not elect to cash out PTO hours previously accrued at the time of your election.
2. This benefit requires an annual election (see Attachment A). Due to IRS regulations, elections will not carry over from one calendar year to the next calendar year.
3. There are two (2) PTO cash-out pay dates. The cash-out will occur on the first payday in June and/or the first payday in December. Two cash-out pay dates may be elected, not to exceed the current allowable amount of PTO hours as indicated on the election form and no less than 24 PTO hours during a single payout.
4. A minimum of 80 hours MUST be in your PTO bank, as of December 31 in the year you are making

the election. Remember to allow enough PTO hours in your bank in order to cover holidays, vacation, sick days, and emergencies. The PTO hours you will accrue in the next calendar year that you elect to cash-out will not be available to use during the year for these purposes. If your accrual rate changes (such as due to a leave or change in scheduled hours) so that there are insufficient hours

Policy/Procedure Number: HR702		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off Cash-Out Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/11/2015		Next Review Date: 01/01/202408/05/2025 Last Review Date: 10/19/202308/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

accrued in the plan year to cover your election, you will receive only the balance of your elected PTO cash-out available at the time of the cash-out. If there are no hours available, no cash-out will occur.

5. The PTO cash-out will be paid in a separate live check or a separate direct deposit. If electing a direct deposit, an active direct deposit must be in effect at the time of the scheduled pay out.
6. **Reminder: If you reach your maximum bank accrual, you will not receive a cash-out if you do not accrue the PTO hours you elected. The cash-out is based on hours you are scheduled to accrue in the next calendar year, not on the bank you had prior to making the election. Plan to take time off so you continue to accrue PTO hours.**
7. If you are a part-time employee, the number of hours you can elect to cash out is **not** pro-rated. However, the actual amount you can cash out is limited by your expected annual accrual. A minimum of 80 hours must be in your PTO bank at the time you make an election.
8. To elect this benefit, you must complete an irrevocable PTO election form, available on PHC4Me (see Attachment A) during the annual PTO cash-out election period and send to HRHelpdesk@partnershiphp.org for processing by December 31st. If electing this benefit for the first time, you must take the "Paid Time Off Cash-Out Program" training on the LMS.
9. **IRS requires that there can be no exceptions. All PTO cash-out elections must be submitted prior to December 31.**
- ~~10. Provided your election is received by the due date and provided you have 80 hours in your PTO bank at the time you make an election, you will automatically receive your PTO cash-out in either June or December. No other action is required.~~
- ~~11.~~ 10. After your election form is submitted by the due date, the Benefits team will first send email confirmation of your eligibility to participate in the program. If eligible to participate based on the requirements, set forth above no further action is required. The Payroll team will send a cash-out confirmation email within one week before your scheduled payout. Your PTO cash-out will be based on your current base rate of pay at the time of the payout.
- ~~12.~~ 11. PTO cash-out is subject to taxation at the applicable supplemental wage rates.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll

X. REVISION DATES:

12/16/2015, 03/23/2018, 06/22/2020, 10/26/2023

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR702			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off Cash-Out Program			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/11/2015		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> PAC
Approval Signature: Sonja Bjork			Approval Date:	

I. RELATED POLICIES:

A. [HR701](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

A. [Paid Time Off Cash-Out Election Form](#)

V. PURPOSE:

Although Partnership HealthPlan of California (Partnership) encourages our employees to take time off away from work in order to have a more balanced lifestyle, Partnership offers a Paid Time Off (PTO) Cash-Out option for eligible employees. This program is intended to provide you with more flexibility in utilizing your time off benefits.

VI. POLICY / PROCEDURE:

A. Eligibility:

1. Employee must have been employed by Partnership for at least one year with a date of hire falling on or before December 30 of the previous year.
2. Employee will have 80 hours of Paid Time Off (PTO) accumulated as of December 31 of the current year.
3. Employee must submit election form prior to December 31 of the current year.

B. Procedure:

1. An election period will be held each year beginning with annual open enrollment and prior to December 31, during which time you will have the opportunity to make an irrevocable election to cash out PTO hours that are scheduled to accrue in the next calendar year. You may not elect to cash out PTO hours previously accrued at the time of your election.
2. This benefit requires an annual election (see Attachment A). Due to IRS regulations, elections will not carry over from one calendar year to the next calendar year.
3. There are two (2) PTO cash-out pay dates. The cash-out will occur on the first payday in June and/or the first payday in December. Two cash-out pay dates may be elected, not to exceed the current allowable amount of PTO hours as indicated on the election form and no less than 24 PTO hours during a single payout.
4. A minimum of 80 hours MUST be in your PTO bank, as of December 31 in the year you are making the election. Remember to allow enough PTO hours in your bank in order to cover holidays,

Policy/Procedure Number: HR702		Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off Cash-Out Program		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/11/2015		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

vacation, sick days, and emergencies. The PTO hours you will accrue in the next calendar year that you elect to cash-out will not be available to use during the year for these purposes. If your accrual rate changes (such as due to a leave or change in scheduled hours) so that there are insufficient hours accrued in the plan year to cover your election, you will receive only the balance of your elected PTO cash-out available at the time of the cash-out. If there are no hours available, no cash-out will occur.

5. The PTO cash-out will be paid in a separate live check or a separate direct deposit. If electing a direct deposit, an active direct deposit must be in effect at the time of the scheduled pay out.
6. **Reminder: If you reach your maximum bank accrual, you will not receive a cash-out if you do not accrue the PTO hours you elected. The cash-out is based on hours you are scheduled to accrue in the next calendar year, not on the bank you had prior to making the election. Plan to take time off so you continue to accrue PTO hours.**
7. If you are a part-time employee, the number of hours you can elect to cash out is **not** pro-rated. However, the actual amount you can cash out is limited by your expected annual accrual. A minimum of 80 hours must be in your PTO bank at the time you make an election.
8. To elect this benefit, you must complete an irrevocable PTO election form, available on PHC4Me (see Attachment A) during the annual PTO cash-out election period and send to HRHelpdesk@partnershiphp.org for processing by December 31st. If electing this benefit for the first time, you must take the “Paid Time Off Cash-Out Program” training on the LMS.
9. **IRS requires that there can be no exceptions. All PTO cash-out elections must be submitted prior to December 31.**
10. After your election form is submitted by the due date, the Benefits team will first send email confirmation of your eligibility to participate in the program. If eligible to participate based on the requirements, set forth above no further action is required. The Payroll team will send a cash-out confirmation email within one week before your scheduled payout. Your PTO cash-out will be based on your current base rate of pay at the time of the payout.
11. PTO cash-out is subject to taxation at the applicable supplemental wage rates.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll

X. REVISION DATES:

12/16/2015, 03/23/2018, 06/22/2020, 10/26/2023, 08/05/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR703			Lead Department: Human Resources		
Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy		
Original Date: May 6, 1996			Next Review Date: 01/31/2024 01/01/2022 Last Review Date: 06/14/2023 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC		
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT	
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC	
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Liz Gibboney Sonja Bjork			Approval Date: 06/15/2023		

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR704](#)
- C. [HR704a](#)
- D. [HR803](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

A. Definitions Applicable to Family and Medical Leave

1. A covered family member is a spouse, registered domestic partner, child, sibling, grandparent, grandchild, parent, or parent-in-law with a serious health condition. "Child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child of an employee or the employee's domestic partner, or a person to whom the employee stands in loco parentis.
2. A designated person is a blood relative or someone with whom you have a relationship that is equivalent to family
3. A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either a stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents you from performing the functions of your job, or prevents your covered family member or designated person from working or participating in school or other daily activities.
4. The continuing treatment requirement may be met by a period of incapacity of more than three consecutive calendar days combined with a least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment. (Pregnancy-related disabilities are generally considered serious health conditions by the FMLA, but not the CFRA. Please refer to our "Pregnancy Disability Leave, Reasonable Accommodation and Transfer" in Section B below for more information about time off pregnancy-related disabilities.)

B. Definitions Applicable to Pregnancy Disability Leave, Reasonable Accommodation, and Transfer

1. A reasonable accommodation is a change in the work environment or the way things are done that enables you to perform the essential (i.e., most important) functions of your job. For example, we may modify work practices, rules, or existing job duties, or provide furniture of other modifying equipment or devices

C. Definitions Applicable to Service Member Family and Medical Leave

Policy/Procedure Number: HR703		Lead Department: Human Resources
Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy
Original Date: May 6, 1996	Next Review Date: 01/01/202531/2024 Last Review Date: 06/14/202301/01/2024	

1. A covered service member with a serious illness or injury is:
 - a. A current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness (NOTE: a serious injury or illness for the purposes of Service Member Leave is not the same as the definition of “serious health condition above; or)
 - b. A veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employees takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness. For a veteran discharged prior to March 8, 2013, the period between October 28, 2009, and March 8, 2013, does not count toward determination of the five-year period
2. A qualifying exigency includes certain events related to a spouse’s, domestic partner’s, parent’s, or child’s call to active military duty. Examples include attending military events, arranging for alternate childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings, or as otherwise provided by law.

IV. ATTACHMENTS:

- A. [Leave of Absence Application](#)
- B. [FAQs](#)

V. PURPOSE:

To provide Directors/Managers/Supervisors and employees appropriate information and procedures regarding Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Family and Medical Leave.

VI. POLICY / PROCEDURE:

A. Family and Medical Leave

Under the federal Family and Medical Leave Act (“FMLA”) and the California Family Rights Act (“CFRA”), you may be eligible to take Family and Medical Leave.

1. You are eligible for Family and Medical Leave if:
 - a. You have worked for Partnership HealthPlan (PHC) for at least 12 months, and for at least 1,250 hours in the last 12 months; and
 - b. In most cases, you may take up to 12 weeks of leave in a 12-month period. The 12 weeks may be taken in a rolling 12-month period measured backward from the date you take Family and Medical Leave. When more than one type of leave of absence provides for leave, the time off will run concurrently (i.e., at the same time), unless otherwise required by law.
2. You may take Family and Medical Leave for the following reasons:
 - a. The birth, adoption, or foster care placement of your child;
 - b. To care for a covered family member or designated person with a serious health condition; or
 - c. Because of your own serious health condition.
3. Intermittent or Reduced Schedule Leave
 - a. You may take leave for a serious health condition intermittently (in separate blocks of time) or on a reduced schedule (reducing your usual hours per workweek or workday), if medically necessary.
 - b. You may also take leave for the birth or placement of a child (“bonding”) in 2-week increments; and in smaller increments (at your request) on two occasions. You must conclude bonding leave within one year of the birth or placement of the child.

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- c. If you take intermittent or reduced-schedule leave for planned medical treatment, PHC may temporarily transfer you to an available alternative position that better accommodates your leave and has equivalent pay and benefits.
 - d. Unless otherwise prohibited by law, PHC may reduce your salary during unpaid intermittent leave, if applicable.
4. Requesting Family and Medical Leave
 - a. You must give Human Resources at least 30 days' notice of the need for foreseeable leave, preferably in writing. If that is not possible—for example, because you have a medical emergency—inform HR as soon as possible. If you have treatment or procedure planned, please consult with HR first about the dates.
 - b. If you are requesting leave to care for a designated person, please identify the designated person when you make your request. Unless otherwise permitted by law, you may choose only one designated person in any 12-month period.
 - c. Human Resources requires sufficient information to determine if the leave will qualify as Family and Medical Leave, and the anticipated duration and timing of the leave. For example, sufficient information may include that you are unable to perform job functions, your family member or designated person is unable to perform daily activities, or the need for hospitalization or continuing treatment by a health care provider. You must also inform HR if the requested leave is for a reason for which Family and Medical Leave was previously taken or certified.
 - d. PHC will notify you whether you are eligible for Family and Medical Leave and, if so, will provide additional information about the leave and your rights and responsibilities. If you are not eligible, we will explain why. PHC will also notify you when leave will be designated as Family and Medical Leave and the amount of leave that will count against your leave entitlement.
 - e. For your own serious health condition or that of a covered family member or designated person, you may be required to provide a medical certification from the relevant health care provider, as permitted by law. HR Benefits will provide the appropriate forms to complete.
 - f. Although this policy provides general information about Family and Medical Leave, Human Resources can provide you with additional information at your request. We'll also provide more information if you request leave for a qualifying reason.
5. Compensation and Benefits During Family and Medical Leave
 - a. Family and Medical Leave is unpaid by PHC, although you may be eligible for wage-replacement benefits, such as state disability (SDI) or paid family leave (PFL) benefits. You may also use any accrued, unused paid time off (subject to the rules of the applicable policy). When you are not receiving any wage-replacement benefits, PHC may require you to use PTO or Catastrophic Leave, if applicable. But, using paid leave won't extend your leave, and you cannot receive more than 100% of your pay.
 - b. While on Family and Medical Leave, PHC will maintain your existing health benefits (if applicable) as if you remained working. You will continue to pay your premium share of cost. If you don't return to work when the Family and Medical Leave is over, you may be required to elect COBRA or reimburse PHC for the cost of health benefit premiums.
 - c. If you aren't using accrued paid time off during Family and Medical Leave, you will stop accruing paid time off.
 - d. Contact Human Resources if you have any questions about other benefits during Family and Medical Leave.
6. Returning to Work
 - a. Usually, following Family and Medical Leave, you will be reinstated to your original job or to an equivalent job. Also, you will not lose any benefits that accrued prior to the start of your leave.

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- b. You must notify PHC when you are able to return to work. If you take another job while on Family and Medical Leave, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment.
- c. If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.

B. Pregnancy Disability Leave, Reasonable Accommodation, and Transfer

1. Eligibility
 - a. If you are disabled by pregnancy, childbirth, or a related medical condition, you may be entitled to pregnancy disability leave ("PDL"), reasonable accommodation, or transfer. Examples of pregnancy-related disabilities include prenatal or postnatal care; doctor-ordered bed rest; gestational diabetes; pregnancy-induced hypertension; preeclampsia; childbirth; postpartum depression; loss or end of pregnancy; or recovery from childbirth or loss or end of pregnancy.
 - b. Although this policy provides information about these rights generally, Human Resources can provide you with additional information at your request
2. Requesting PDL, Reasonable Accommodation or Transfer
 - a. Inform Human Resources as soon as you know that you may need PDL, a reasonable accommodation, or transfer. It will help us plan and make the transition smooth for you and your co-workers. If you have planned appointments or medical treatment, consult with your manager first, so we can do our best to coordinate schedules. In most cases, we expect you to notify us at least 30 days in advance.
 - b. You may take up to four months of PDL (based on the number of days you would normally work in a 4-month period). You may take the leave "intermittently," meaning in small blocks of time, if your health care provider determines it is necessary (for example, to attend medical appointments), in increments of no less than one hour.
 - c. You may temporarily transfer to a less strenuous or hazardous position or duties if your health care provider determines it is medically advisable, and it can be reasonably accommodated. However, it is generally not reasonable for us to transfer or promote you to a position for which you are not qualified, create a new position, discharge another employee, or transfer another employee with more seniority.
 - d. We may require you to transfer temporarily to another position, if your health care provider determines you need to take leave intermittently or on a reduced schedule, and the other position better meets your needs. Of course, the alternative position must meet your needs, and you must be qualified for it. Even though you will receive equivalent pay and benefits, you may not have equivalent duties.
 - e. The right to an accommodation is separate from your right to leave. But, if you require time off as a reasonable accommodation (for example, you are a full-time employees and need to work part-time), it may be counted as PDL and reduce your 4-month leave entitlement.
 - f. If you need PDL, reasonable accommodation, or transfer, we may require you to provide a certification. HR Benefits will provide the appropriate forms to complete.
3. Compensation and Benefits During PDL
 - a. PDL is unpaid by PHC, but you may use any accrued, unused PTO, PSL or Catastrophic Leave, if applicable, before taking the remainder of your leave without pay. You can also contact the EDD to find out whether you are eligible for SDI benefits.
 - b. While on PDL, PHC will maintain your existing health benefits (if applicable) as if you remained working. If you don't return to work when the PDL is over, you may be required to reimburse PHC for the cost of health benefit premiums.
 - c. If you aren't using accrued paid time off during PDL, you will stop accruing paid time off.

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- d. Contact Human Resources if you have any questions about other PHC benefits.
4. Coordinating PDL with FMLA, CFRA, State Disability Insurance (SDI), and Paid Family Leave (PFL)
 - a. PDL is for pregnancy-related disability only, although it generally will run concurrently with the FMLA, if you are eligible. However, after your baby is born, you may be entitled to additional time off to “bond” with your new baby under the CFRA. Refer to the “Family and Medical Leave” noted in Section A above for additional information, or contact Human Resources.
 - b. During PDL (or PDL/FMLA), you may be eligible for wage replacement benefits through State Disability Insurance (SDI). If you take baby bonding leave under the CFRA, you may be eligible for wage replacement benefits through the state’s Paid Family Leave (PFL) program. Refer to the EDD pamphlets for additional information, or contact Human Resources.
5. Returning to Work
 - a. When your leave, reasonable accommodation, or transfer ends, we will reinstate you to the same position or, in certain instances, to a comparable position. Also, you will not lose any benefits that accrued prior to the start of your leave.
 - b. You must notify PHC when you are able to return to work. If you take another job while on PDL, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment. If you take additional, PHC-approved leave immediately following your PDL, your right to reinstatement will be determined by PHC policy regarding that type of leave, not by this policy.
 - c. Before you return from PDL, we may require you to provide a release to return to work from your health care provider.

C. Personal Medical Leave

1. Eligibility
 - a. If you are disabled due to illness or injury (and are not eligible for Family and Medical Leave, or have exhausted your right to it), you may be eligible for an unpaid Personal Medical Leave (“PML”). It doesn’t matter whether your illness or injury is work-related. You are not guaranteed a certain amount of PML; the amount of time will depend on the circumstances. It may also run concurrently with other legally required time off.
2. Requesting Leave
 - a. To request PML, notify Human Resources or your manager in writing as soon as possible.
 - b. You may be required to provide a medical certification or other documentation regarding your request or need for time off. The appropriate documentation will vary depending on the circumstances.
3. Compensation and Benefits During Leave
 - a. PML is unpaid. You will be required to use any accrued, unused PTO during PML. When you have exhausted your PTO, you may choose to use PSL, or we may require you to use Catastrophic Leave (if applicable). But, the use of paid leave will not extend your leave, and you must comply with applicable paid leave policies. You can also contact the EDD to find out if you are eligible for SDI benefits.
 - b. Your eligibility for PHC-paid health benefits will cease the first of the month following the PML start date. You must pay the full premiums to continue your benefits. You will receive notice directly from PHC’s third-party administrator of your right to continue your benefits through COBRA. Your eligibility to receive medical and/or dental/vision credit payments will also cease the first of the month following the PML start date.
 - c. Anytime you are not using accrued paid time off during PML, you will stop accruing paid time off.

Policy/Procedure Number: HR703		Lead Department: Human Resources
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Original Date: May 6, 1996	Next Review Date: 01/ 01/2025 31/2024 Last Review Date: 06/14/2023 01/01/2024	

4. Returning to Work

- a. You must notify PHC when you are able to return to work. If you take another job while on Personal Medical Leave, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment.
- b. If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.

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D. Service Member Family and Medical Leave

1. Eligibility

- a. In addition to time off as described in the “Family and Medical Leave” policy above, the FMLA provides eligible employees time off for certain absences related to a covered family member’s service in the Armed Forces (“Service Member FMLA”). Except as mentioned below, the “Family and Medical Leave” policy applies to Service Member Leave.
- b. Other leave of absence laws, like the CFRA, may also apply to service member FMLA. In those circumstances, the time off under other leave laws and service member FMLA run concurrently (i.e., at the same time).
- c. To be eligible for service member FMLA, you must meet the eligibility requirements described in the “Family and Medical Leave” policy, above. If you are eligible, you may take service member FMLA as follows:
 - 1) Up to 12 weeks of leave in a 12-month period for a “qualifying exigency”; or
 - 2) Up to 26 weeks of leave in a 12-month period to care for a spouse, parent, child, or next of kin who is a “covered service member” with a “serious illness or injury” incurred in the line of duty.

You should speak with Human Resources if you have questions about qualifying reasons for leave or your eligibility. But, generally, if you have pressing personal business to attend to because a family member is deployed overseas, or if your family member is injured or seriously ill as a result of active military service, you will probably be eligible for Service Member FMLA, provided you meet other eligibility requirements.

2. Requesting Leave

- a. Please provide as much advance notice as practicable of your need for Service Member Leave. If the leave is for the planned medical treatment of a covered service member, you must provide 30 days’ advance notice, if you can. Otherwise, you must provide notice as soon as you can.
- b. For leave for a qualifying exigency, PHC may require you to provide a copy of the covered service member’s active duty orders or other documentation. PHC may also require you to provide a certification verifying eligibility for leave, or may contact the Department of Defense or an applicable third party for verification purposes.
- c. For leave to care for a covered service member PHC may require you to provide a medical certification from an authorized health care provider verifying certain information regarding the covered service member and his or her injury or illness. You can obtain more information about the certification and verification requirements from Human Resources.
- d. Please contact Human Resources for any questions about this policy.

VII. REFERENCES:

N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

09/26/2013, 12/31/2013, 07/01/2018, 07/16/2019, 01/31/2021, 06/09/2021, 12/17/2021, 01/01/2023, 06/14/2023

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR703			Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 01/01/2024	

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR704](#)
- C. [HR704a](#)
- D. [HR803](#)

II. IMPACTED DEPTS:

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III. DEFINITIONS:

A. Definitions Applicable to Family and Medical Leave

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2. A designated person is a blood relative or someone with whom you have a relationship that is equivalent to family
3. A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either a stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents you from performing the functions of your job, or prevents your covered family member or designated person from working or participating in school or other daily activities.
4. The continuing treatment requirement may be met by a period of incapacity of more than three consecutive calendar days combined with a least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment. (Pregnancy-related disabilities are generally considered serious health conditions by the FMLA, but not the CFRA. Please refer to our "Pregnancy Disability Leave, Reasonable Accommodation and Transfer" in Section B below for more information about time off pregnancy-related disabilities.)

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 - b. A veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employees takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness. For a veteran discharged prior to March 8, 2013, the period between October 28, 2009, and March 8, 2013, does not count toward determination of the five-year period
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IV. ATTACHMENTS:

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- b. You must notify PHC when you are able to return to work. If you take another job while on Family and Medical Leave, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment.
- c. If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.

B. Pregnancy Disability Leave, Reasonable Accommodation, and Transfer

1. Eligibility
 - a. If you are disabled by pregnancy, childbirth, or a related medical condition, you may be entitled to pregnancy disability leave ("PDL"), reasonable accommodation, or transfer. Examples of pregnancy-related disabilities include prenatal or postnatal care; doctor-ordered bed rest; gestational diabetes; pregnancy-induced hypertension; preeclampsia; childbirth; postpartum depression; loss or end of pregnancy; or recovery from childbirth or loss or end of pregnancy.
 - b. Although this policy provides information about these rights generally, Human Resources can provide you with additional information at your request
2. Requesting PDL, Reasonable Accommodation or Transfer
 - a. Inform Human Resources as soon as you know that you may need PDL, a reasonable accommodation, or transfer. It will help us plan and make the transition smooth for you and your co-workers. If you have planned appointments or medical treatment, consult with your manager first, so we can do our best to coordinate schedules. In most cases, we expect you to notify us at least 30 days in advance.
 - b. You may take up to four months of PDL (based on the number of days you would normally work in a 4-month period). You may take the leave "intermittently," meaning in small blocks of time, if your health care provider determines it is necessary (for example, to attend medical appointments), in increments of no less than one hour.
 - c. You may temporarily transfer to a less strenuous or hazardous position or duties if your health care provider determines it is medically advisable, and it can be reasonably accommodated. However, it is generally not reasonable for us to transfer or promote you to a position for which you are not qualified, create a new position, discharge another employee, or transfer another employee with more seniority.
 - d. We may require you to transfer temporarily to another position, if your health care provider determines you need to take leave intermittently or on a reduced schedule, and the other position better meets your needs. Of course, the alternative position must meet your needs, and you must be qualified for it. Even though you will receive equivalent pay and benefits, you may not have equivalent duties.
 - e. The right to an accommodation is separate from your right to leave. But, if you require time off as a reasonable accommodation (for example, you are a full-time employees and need to work part-time), it may be counted as PDL and reduce your 4-month leave entitlement.
 - f. If you need PDL, reasonable accommodation, or transfer, we may require you to provide a certification. HR Benefits will provide the appropriate forms to complete.
3. Compensation and Benefits During PDL
 - a. PDL is unpaid by PHC, but you may use any accrued, unused PTO, PSL or Catastrophic Leave, if applicable, before taking the remainder of your leave without pay. You can also contact the EDD to find out whether you are eligible for SDI benefits.
 - b. While on PDL, PHC will maintain your existing health benefits (if applicable) as if you remained working. If you don't return to work when the PDL is over, you may be required to reimburse PHC for the cost of health benefit premiums.
 - c. If you aren't using accrued paid time off during PDL, you will stop accruing paid time off.

Policy/Procedure Number: HR703		Lead Department: Human Resources	
Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- d. Contact Human Resources if you have any questions about other PHC benefits.
4. Coordinating PDL with FMLA, CFRA, State Disability Insurance (SDI), and Paid Family Leave (PFL)
 - a. PDL is for pregnancy-related disability only, although it generally will run concurrently with the FMLA, if you are eligible. However, after your baby is born, you may be entitled to additional time off to “bond” with your new baby under the CFRA. Refer to the “Family and Medical Leave” noted in Section A above for additional information, or contact Human Resources.
 - b. During PDL (or PDL/FMLA), you may be eligible for wage replacement benefits through State Disability Insurance (SDI). If you take baby bonding leave under the CFRA, you may be eligible for wage replacement benefits through the state’s Paid Family Leave (PFL) program. Refer to the EDD pamphlets for additional information, or contact Human Resources.
5. Returning to Work
 - a. When your leave, reasonable accommodation, or transfer ends, we will reinstate you to the same position or, in certain instances, to a comparable position. Also, you will not lose any benefits that accrued prior to the start of your leave.
 - b. You must notify PHC when you are able to return to work. If you take another job while on PDL, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment. If you take additional, PHC-approved leave immediately following your PDL, your right to reinstatement will be determined by PHC policy regarding that type of leave, not by this policy.
 - c. Before you return from PDL, we may require you to provide a release to return to work from your health care provider.

C. Personal Medical Leave

1. Eligibility
 - a. If you are disabled due to illness or injury (and are not eligible for Family and Medical Leave, or have exhausted your right to it), you may be eligible for an unpaid Personal Medical Leave (“PML”). It doesn’t matter whether your illness or injury is work-related. You are not guaranteed a certain amount of PML; the amount of time will depend on the circumstances. It may also run concurrently with other legally required time off.
2. Requesting Leave
 - a. To request PML, notify Human Resources or your manager in writing as soon as possible.
 - b. You may be required to provide a medical certification or other documentation regarding your request or need for time off. The appropriate documentation will vary depending on the circumstances.
3. Compensation and Benefits During Leave
 - a. PML is unpaid. You will be required to use any accrued, unused PTO during PML. When you have exhausted your PTO, you may choose to use PSL, or we may require you to use Catastrophic Leave (if applicable). But, the use of paid leave will not extend your leave, and you must comply with applicable paid leave policies. You can also contact the EDD to find out if you are eligible for SDI benefits.
 - b. Your eligibility for PHC-paid health benefits will cease the first of the month following the PML start date. You must pay the full premiums to continue your benefits. You will receive notice directly from PHC’s third-party administrator of your right to continue your benefits through COBRA. Your eligibility to receive medical and/or dental/vision credit payments will also cease the first of the month following the PML start date.
 - c. Anytime you are not using accrued paid time off during PML, you will stop accruing paid time off.

Policy/Procedure Number: HR703		Lead Department: Human Resources	
Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

4. Returning to Work

- a. You must notify PHC when you are able to return to work. If you take another job while on Personal Medical Leave, or if you do not return at the conclusion of leave without obtaining additional authorization for your absence, we may assume you have voluntarily resigned your employment.
- b. If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.

D. Service Member Family and Medical Leave

1. Eligibility

- a. In addition to time off as described in the “Family and Medical Leave” policy above, the FMLA provides eligible employees time off for certain absences related to a covered family member’s service in the Armed Forces (“Service Member FMLA”). Except as mentioned below, the “Family and Medical Leave” policy applies to Service Member Leave.
- b. Other leave of absence laws, like the CFRA, may also apply to service member FMLA. In those circumstances, the time off under other leave laws and service member FMLA run concurrently (i.e., at the same time).
- c. To be eligible for service member FMLA, you must meet the eligibility requirements described in the “Family and Medical Leave” policy, above. If you are eligible, you may take service member FMLA as follows:
 - 1) Up to 12 weeks of leave in a 12-month period for a “qualifying exigency”; or
 - 2) Up to 26 weeks of leave in a 12-month period to care for a spouse, parent, child, or next of kin who is a “covered service member” with a “serious illness or injury” incurred in the line of duty.

You should speak with Human Resources if you have questions about qualifying reasons for leave or your eligibility. But, generally, if you have pressing personal business to attend to because a family member is deployed overseas, or if your family member is injured or seriously ill as a result of active military service, you will probably be eligible for Service Member FMLA, provided you meet other eligibility requirements.

2. Requesting Leave

- a. Please provide as much advance notice as practicable of your need for Service Member Leave. If the leave is for the planned medical treatment of a covered service member, you must provide 30 days’ advance notice, if you can. Otherwise, you must provide notice as soon as you can.
- b. For leave for a qualifying exigency, PHC may require you to provide a copy of the covered service member’s active duty orders or other documentation. PHC may also require you to provide a certification verifying eligibility for leave, or may contact the Department of Defense or an applicable third party for verification purposes.
- c. For leave to care for a covered service member PHC may require you to provide a medical certification from an authorized health care provider verifying certain information regarding the covered service member and his or her injury or illness. You can obtain more information about the certification and verification requirements from Human Resources.
- d. Please contact Human Resources for any questions about this policy.

VII. REFERENCES:

N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

Policy/Procedure Number: HR703		Lead Department: Human Resources	
Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

X. REVISION DATES:

09/26/2013, 12/31/2013, 07/01/2018, 07/16/2019, 01/31/2021, 06/09/2021, 12/17/2021, 01/01/2023, 06/14/2023, 01/01/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR706a		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: March 15, 2010		Next Review Date: 01/01/2025 ⁵⁴ Last Review Date: 01/01/2023 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE <input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE <input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibboney Sonja Bjork		Approval Date: 12/19/2017	

I. RELATED POLICIES:

- A. [HR610](#)
- B. [HR701](#)
- C. [HR707](#)
- D. [HR708](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. 9/80 Alternate Work Schedule: The 9/80 alternate work schedule consists of eight (8) work days of nine (9) hours and one work day of eight (8) hours for a total of eighty (80) hours during two (2) consecutive workweeks. The eight (8) hour work day must be on the same day of the week as the employee's regularly scheduled day off. Therefore, under the 9/80 schedule, one calendar week will consist of 44 hours (four 9-hour days and one 8-hour day) and the alternating calendar week will consist of 36 hours (four 9-hour days and one day off).
- B. Full-Time Employee: For the purpose of this policy, a full time employee is defined as working 80 hours per pay period.
- C. Enrollment: ~~Reenrollment or schedule changes can occur twice a year in December for a start date in January and in June for a start date in July.~~ Employees ~~who have not participated~~ may enroll or request schedule changes at any time during the year. Enrollment is always at the discretion of Management.

IV. ATTACHMENTS:

- A. [9/80 Schedule Agreement Form](#)

V. PURPOSE:

The purpose of this policy is to outline how Partnership HealthPlan of California (Partnership) will establish and administer an alternate workweek schedule commonly referred to as a 9/80 workweek.

VI. POLICY / PROCEDURE:

Partnership offers employees a compressed work schedule known as a 9/80 work schedule. This alternate work

Policy/Procedure Number: HR706a		Lead Department: Human Resources	
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Original Date: March 15, 2010		Next Review Date: 01/01/2025	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

schedule provides employees with another way to manage work and non-work responsibilities by giving an additional day off of work while still achieving a full-time schedule (80 hours in a two-week work period).

A. Eligibility:

1. All full-time Partnership employees, after completing their introductory requirements, are eligible to participate in the 9/80 work schedule. Individual schedules are set at the discretion of the department director/manager based on business needs and set 9/80 schedules as listed under "Hours of Work". Employees must have at least 20 hours of ~~combined PTO and PSL~~ in order to apply. Employees not meeting job standards/expectations may not participate in the compressed work schedule until performance meets standards. The director/manager will review such exceptions with Human Resources before denying the option. Once enrolled in the program, participation in the program may be discontinued due to personal hardship, if there is a decline in service levels, if the employee exhausts their PTO and is utilizing Leave Without Pay or if employee conduct is below standard (see paragraphs within this policy entitled "Expectations of Service" and "Expectations of Conduct"). If eligible, re-enrollment into the plan after voluntary discontinuance can only occur during open enrollment. Individuals who do not wish to participate may continue to work a standard 40-hour week.

B. Approval:

1. Before beginning participation in the 9/80 program, employees must complete a "9/80 Workweek Request Form – Exempt" and acknowledge they have received and read the policy. They must obtain supervisory approval before submitting the form to the Human Resources Department. Employees cannot begin their 9/80 workweek until they have received a formal approval memo from Payroll.

C. Transitioning:

1. Beginning the 9/80 Schedule: As an exempt employee is not eligible for the payment of overtime, the approved 9/80 work schedule can begin at the director's/manager's discretion, at the beginning of the next regular pay period. The requested start date should be noted on the approval form.
2. Transferring Departments: Department directors, at their discretion, may discontinue the employee's 9/80 schedule, based on the needs of the department.
3. Termination of Program: The 9/80 Compressed Work schedule is an optional benefit that can be discontinued at any time for any reason at management discretion. Prior to the employee's removal from the program, the Director/Manager must consult with Human Resources to develop a transition plan. Employees are not allowed to change schedule without prior approval from Human Resources and Management.
4. Failure to adhere to the expectations, as listed under "Expectations", will also be cause for discontinuation from the 9/80 program.

D. Hours of Work:

1. As exempt employees are not eligible for the payment of overtime, start and end times for a 9/80 schedule will be set between participating employee and their director/manager. All participating employees will enter their requested schedules on the applicable Exempt approval form.
2. Paid Time Off and Paid Sick Leave (PTO and PSL): PTO time accrual and PSL lump sum awarded hours will remain the same for participating employees. When an employee takes a day off under the vacation or sick pay policies, the accrual will be depleted by the number of scheduled hours for that day. For example, if an employee takes a PTO or PSL day on one of their 9-hour days, 9 hours of time will be removed from their total available hours. Should an employee work on their scheduled 9/80 day off, the employee will be permitted to take another day off in the same pay period.
3. Holiday Pay: Holiday pay shall remain at eight (8) hours. When a holiday falls on a regular nine (9)

Policy/Procedure Number: HR706a		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: March 15, 2010		Next Review Date: 01/01/2025⁴ Last Review Date: 01/01/202301/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

hour workday, the employee has the option of using one hour of accrued vacation time or working one hour of make-up time (must have prior approval from Director/Manager). When utilizing vacation time the employee must submit a time off request in ADP. Should a holiday fall on an employee's scheduled day off, the employee will be permitted to take another day off in the same pay period.

4. Jury Duty and Bereavement Leave: Pay shall remain at a maximum of up to eight (8) hours per day, in accordance to the leave policies. Should the leave fall on an employee's flex day off, the employee will not receive pay for that day. As stated in the policies, employees will receive pay for each full or partial working day. The employee has the option of using one hour of accrued vacation time or working one hour of make-up time for each day on leave.
 5. Bereavement Leave – Up to ~~three~~ five (35) days of ~~paid~~ leave, three (3) of which are paid.
 6. Jury Duty – Up to two weeks (10 total business days) of paid leave
 7. Spot Bonus Certificates – ½ day off with pay shall remain at a maximum of 4 hours
- E. Expectations
1. Expectations of Service: The 9/80 work schedule is not an entitlement. The 9/80 work schedule will not be provided at the expense of service to the public and must not adversely affect the organization's or a department's ability to provide coverage and maintain service levels. Department directors, at their discretion, may discontinue participation in the 9/80 by an individual, group, or department, if it is determined that service levels are not being maintained.
 2. Expectations of Conduct: Failure to adhere to assigned work hours, tardiness, and excessive absenteeism will lead to revocation of the benefit for the individual. As with weekends, employees must agree to come in on a scheduled day off, if necessary, for an urgent situation. Employees are encouraged to use days off to attend to personal business like medical/dental appointments for themselves and family members.
 3. Expectations of Time Keeping: Employees are expected to complete timesheets by Payroll's processing deadline regardless of schedule or out of office events. Failure to do so will result in a warning notification from Payroll to Human Resources, the employee and employee's supervisor, the third notification will result in discontinuation from the program. Notifications are counted per enrollment period.
 4. Expectations of Communication: Employees are expected to alert key contacts outside and inside the company regarding days off. Typically this would be accomplished by creating an outgoing voicemail message and an e-mail message that informs others the employee will be out of the office, and who can be contacted for assistance. Employees are also expected to show their time as "Out of Office" on their Outlook calendars.
 5. Expectations of Management: Directors/Managers are expected to notify Human Resources and Payroll of any and all changes to work schedule or work hours as soon as they are known. Managers are also expected to be fully aware of this policy and procedure.

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Original Date: March 15, 2010		Next Review Date: - 01/01/2024³ Last Review Date: 01/01/2022	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

F. PROCEDURE:

Responsible Party	Action
Employee	Employee completes the 9/80 Workweek Request Form. Non-exempt employees must complete the form 4 weeks in advance of the requested 9/80 start date. Employee forwards to supervisor for approval.
Supervisor	Supervisor reviews form and approves or denies. If approved, supervisor forwards form to HR.
Human Resources	Reviews request and approves or denies.
Payroll	If approved, Payroll determines new workweek and sends memo (can be via e-mail) to employee and respective supervisor outlining the new schedule and when the new workweek will begin.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

04/22/2012, 06/27/2013, 02/06/2014, 06/25/2014, 01/01/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR706a			Lead Department: Human Resources	
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	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 01/18/2024	

I. RELATED POLICIES:

- A. [HR610](#)
- B. [HR701](#)
- C. [HR707](#)
- D. [HR708](#)

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4. Failure to adhere to the expectations, as listed under “Expectations”, will also be cause for discontinuation from the 9/80 program.

D. Hours of Work:

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2. Paid Time Off and Paid Sick Leave (PTO and PSL): PTO time accrual and PSL lump sum awarded hours will remain the same for participating employees. When an employee takes a day off under the vacation or sick pay policies, the accrual will be depleted by the number of scheduled hours for that day. For example, if an employee takes a PTO or PSL day on one of their 9-hour days, 9 hours of time will be removed from their total available hours. Should an employee work on their scheduled 9/80 day off, the employee will be permitted to take another day off in the same pay period.
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hour workday, the employee has the option of using one hour of accrued vacation time or working one hour of make-up time (must have prior approval from Director/Manager). When utilizing vacation time the employee must submit a time off request in ADP. Should a holiday fall on an employee's scheduled day off, the employee will be permitted to take another day off in the same pay period.

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 5. Bereavement Leave – Up to five (5) days of leave, three (3) of which are paid.
 6. Jury Duty – Up to two weeks (10 total business days) of paid leave
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- E. Expectations
1. Expectations of Service: The 9/80 work schedule is not an entitlement. The 9/80 work schedule will not be provided at the expense of service to the public and must not adversely affect the organization's or a department's ability to provide coverage and maintain service levels. Department directors, at their discretion, may discontinue participation in the 9/80 by an individual, group, or department, if it is determined that service levels are not being maintained.
 2. Expectations of Conduct: Failure to adhere to assigned work hours, tardiness, and excessive absenteeism will lead to revocation of the benefit for the individual. As with weekends, employees must agree to come in on a scheduled day off, if necessary, for an urgent situation. Employees are encouraged to use days off to attend to personal business like medical/dental appointments for themselves and family members.
 3. Expectations of Time Keeping: Employees are expected to complete timesheets by Payroll's processing deadline regardless of schedule or out of office events. Failure to do so will result in a warning notification from Payroll to Human Resources, the employee and employee's supervisor, the third notification will result in discontinuation from the program. Notifications are counted per enrollment period.
 4. Expectations of Communication: Employees are expected to alert key contacts outside and inside the company regarding days off. Typically this would be accomplished by creating an outgoing voicemail message and an e-mail message that informs others the employee will be out of the office, and who can be contacted for assistance. Employees are also expected to show their time as "Out of Office" on their Outlook calendars.
 5. Expectations of Management: Directors/Managers are expected to notify Human Resources and Payroll of any and all changes to work schedule or work hours as soon as they are known. Managers are also expected to be fully aware of this policy and procedure.

Policy/Procedure Number: HR706a		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: March 15, 2010		Next Review Date: 01/01/2024 Last Review Date: 01/01/2022	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

F. PROCEDURE:

Responsible Party	Action
Employee	Employee completes the 9/80 Workweek Request Form. Non-exempt employees must complete the form 4 weeks in advance of the requested 9/80 start date. Employee forwards to supervisor for approval.
Supervisor	Supervisor reviews form and approves or denies. If approved, supervisor forwards form to HR.
Human Resources	Reviews request and approves or denies.
Payroll	If approved, Payroll determines new workweek and sends memo (can be via e-mail) to employee and respective supervisor outlining the new schedule and when the new workweek will begin.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

04/22/2012, 06/27/2013, 02/06/2014, 06/25/2014, 01/01/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR706b			Lead Department: Human Resources		
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy		
Original Date: March 15, 2010		Next Review Date: 01/01/2025 ⁵⁴ Last Review Date:			
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC		
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT	
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC	
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER		
Approval Signature: Liz Gibboney Sonja Bjork			Approval Date: 12/19/2017		

I. RELATED POLICIES:

- A. [HR610](#)
- B. [HR701](#)
- C. [HR707](#)
- D. [HR708](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. 9/80 Alternate Work Schedule: The 9/80 alternate work schedule consists of eight (8) work days of nine (9) hours and one work day of eight (8) hours for a total of eighty (80) hours during two (2) consecutive workweeks. The eight (8) hour work day must be on the same day of the week as the employee's regularly scheduled day off. Therefore, under the 9/80 schedule, one calendar week will consist of 44 hours (four 9-hour days and one 8-hour day) and the alternating calendar week will consist of 36 hours (four 9-hour days and one day off).
- B. Full-Time Employee: For the purpose of this policy, a full time employee is defined as working 80 hours per pay period.
- C. Enrollment: Employees may enroll or request schedule changes at any time during the year. Enrollment is always at the discretion of Management.
- D. 9/80 FLSA Workweek: Under the Fair Labor Standards Act the workweek is defined as "a fixed and regularly recurring period of seven consecutive 24-hour periods (168 hours)." The 9/80 workweek- begins on the employee's 8 hour day, exactly four (4) hours after the scheduled start time and ends exactly three (3) hours and fifty-nine (59) minutes after the scheduled start time on the same day the following week. We commonly refer to this as a day divide, where 4 hours of the eight (8) hour day occurs in one week, and 4 hours occurs in the following week. Payroll and Human Resources can answer question about day divides. A visual representation is shown at the end of the policy.

IV. ATTACHMENTS:

- A. [9/80 Schedule Agreement Form](#)

V. PURPOSE:

The purpose of this policy is to outline how Partnership will establish and administer an alternate workweek schedule commonly referred to as a 9/80 workweek.

VI. POLICY / PROCEDURE:

Policy/Procedure Number: HR706b		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 01/01/20254-Last Review Date: 01/01/20243	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

Partnership offers employees a compressed work schedule known as a 9/80 work schedule. This alternate work schedule provides employees with another way to manage work and non-work responsibilities by giving an additional day off of work while still achieving a full-time schedule (80 hours in a two-week work period).

A. Eligibility:

1. All full-time Partnership employees, after completing their introductory requirements, are eligible to participate in the 9/80 work schedule. Individual schedules are set at the discretion of the department director/manager based on business needs and set 9/80 schedules as listed under "Hours of Work." Employees must have at least 20 hours of ~~combined PTO and PSL~~ in order to apply. Employees not meeting job standards/expectations may not participate in the compressed work schedule until performance meets standards. The director/manager will review such exceptions with Human Resources before denying the option. Once enrolled in the program, participation in the program may be discontinued due to personal hardship, if there is a decline in service levels, if the employee exhausts their PTO and is utilizing Leave Without Pay or if employee conduct is below standard (see paragraphs within this policy titled "Expectations of Service" and "Expectations of Conduct"). Individuals who do not wish to participate may continue to work a standard 40-hour week.

B. Approval:

1. Before beginning participation in the 9/80 program, employees must complete a "9/80 Workweek Request Form – Nonexempt" and acknowledge they have received and read the policy. They must obtain supervisory approval before submitting the form to the Human Resources Department. Employees cannot begin their 9/80 workweek until they have received a formal approval memo from Payroll.

C. Transitioning:

1. Beginning the 9/80 schedule: When an employee transitions from an 8 hour a day workweek to a 9/80 work schedule, there will be a necessary change in the beginning of the workweek. This results in a situation in which some of the hours fall in both the old workweek and the new workweek. This could result in fewer than 80 hours on your paycheck for that transitional period, or more than 80 hours. If more than 80 hours, a calculation of overtime will be made by Payroll which includes those hours in both the old and new workweeks, and the greater of the two amounts will be paid to the employee at time and a half. Where possible, HR may require you to work a ½ day during your transition week to minimize overtime and ensure you still receive a full paycheck.
2. Transferring Departments: Department directors, at their discretion, may discontinue the employee's 9/80 schedule, based on the needs of the department.
3. Termination of the Program: The 9/80 Compressed Work schedule is an optional benefit that can be discontinued at any time for any reason at management discretion. Prior to the employee's removal from the program, the Director/Manager must consult with Human Resources to develop a transition plan.
4. Continued failure to adhere to the expectations, as listed under "Expectations", will also be cause for discontinuation from the 9/80 program. PTO must be utilized when available, employees are not allowed to voluntarily utilize unprotected Leave Without Pay in order to preserve their PTO balance.

D. Hours of Work:

1. In conjunction with their director/manager, employee will select their flex day and one of the six scheduled times as follows:

Policy/Procedure Number: HR706b		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 01/01/2025⁴ Last Review Date: 01/01/2024³	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

	<u>Start</u>	<u>½ Hour Lunch Between Hours Of</u>	<u>End</u>
Schedule A	6:00 am	10:00 am and 12:00 pm	3:30 pm
Schedule B	6:30 am	10:30 am and 12:30 pm	4:00 pm
Schedule C	7:00 am	11:00 am and 1:00 pm	4:30 pm
Schedule D	7:30 am	11:30 am and 1:30 pm	5:00 pm
Schedule E	8:00 am	12:00 pm and 2:00 pm	5:30 pm
Schedule F	8:30 am	12:30 pm and 2:30 pm	6:00 pm

2. Once the flex day has been selected it cannot be changed during a pay period, such as switching from Monday to Friday, or switching between 1st or 2nd week of the pay period. If a change is requested, it must be submitted on the applicable 9/80 form for approval. All participating employees will enter their requested schedules on the applicable Nonexempt approval form.
3. Day Divide: Employees should NOT clock out for lunch until after four (4) hours into their work day. Employees may be required to take a 1 hour lunch to ensure that business needs are met. The make-up time policy does not apply to the "Day Divide."
4. Paid Time Off and Paid Sick Leave (PTO and PSL): PTO time accrual and PSL lump sum awarded hours will remain the same for participating employees. When an employee takes a day off under the vacation or sick pay policies, the accrual will be depleted by the number of scheduled hours for that day. For example, if an employee takes a PTO or PSL day on one of their 9-hour days, 9 hours of time will be removed from their total available hours.
5. Holiday Pay: Holiday pay shall remain at eight (8) hours. When a holiday falls on a regular nine (9) hour workday, the employee has the option of using one hour of accrued vacation time or working one hour of make-up time (must have prior approval from Director/Manager). When utilizing vacation time the employee must submit a time off request in ADP. Should a holiday fall on an employee's scheduled day off, the employee will be permitted to take another day off in the same work week.
6. Overtime: 9/80 workweeks may not generally correspond with Partnership's pay periods. Therefore, adjustments to overtime compensation due cannot be calculated until the completion of the employee's workweek. This may result in one pay period's delay in the employee receiving the additional compensation.
7. Jury Duty and Bereavement Leave: Pay shall remain at a maximum of up to eight (8) hours per day, in accordance to the leave policies. Should the leave fall on an employee's flex day off, the employee will not receive pay for that day. As stated in the policies, employees will receive pay for each full or partial working day. The employee has the option of using one hour of accrued vacation time or working one hour of make-up time for each day on leave.
8. Bereavement Leave – Up to three (3) days of paid leave
9. Jury Duty – Up to two weeks (10 total business days) of paid leave
10. Spot Bonus Certificates – ½ day off with pay shall remain at a maximum of 4 hours.

E. Expectations:

1. Expectations of Service: The 9/80 work schedule is not an entitlement. The 9/80 work schedule will not be provided at the expense of service to the public and must not adversely affect the organization's or a department's ability to provide coverage and maintain service levels. Department directors, at their discretion, may discontinue participation in the 9/80 by an individual, group, or department, if it is determined that service levels are not being maintained.
2. Expectations of Employee Conduct: Failure to adhere to assigned work hours, tardiness, and excessive absenteeism will lead to revocation of the benefit for the individual. As with weekends,

Policy/Procedure Number: HR706b	Lead Department: Human Resources
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Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 01/01/2025 ⁵⁴ Last Review Date: 01/01/2024 ⁴³	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

employees must agree to come in on a scheduled day off, if necessary, for an urgent situation. Employees are encouraged to use days off to attend to personal business like medical/dental appointments for themselves and family members.

3. Expectations of Time Keeping: Employees are expected to submit any missing punches and electronic time off requests by Payroll's deadline. Failure to do so will result in a warning notification from Payroll to Human Resources, the employee and employee's supervisor, the third notification will result in discontinuation from the program. Notifications are counted per enrollment period. In the event that the employee is absent the supervisor is expected to submit on their behalf.
4. Expectations of Communication: Employees are expected to alert key contacts outside and inside the company regarding days off. Typically this would be accomplished by creating an outgoing voicemail message and an e-mail message that informs others the employee will be out of the office, and who can be contacted for assistance. Employees are also expected to show their time as "Out of Office" on their Outlook calendars.
5. Expectations of Management: Directors/Managers are expected to notify Human Resources of any and all changes to work schedule or work hours as soon as they are known. Managers are also expected to be fully aware of this policy and procedure, including how to administer overtime with non-exempt 9/80 employees.
6. Expectations of Employee:

F. Procedure:

Responsible Party	Action
Employee	Employee completes the 9/80 Workweek Request Form. Non-exempt employees must complete the form 4 weeks in advance of the requested 9/80 start date. Employee forwards to supervisor for approval.
Supervisor	Supervisor reviews form and approves or denies. If approved, supervisor forwards form to HR.
Human Resources	Reviews request and approves or denies.
Payroll	If approved, Payroll determines new workweek and sends memo (can be via e-mail) to employee and respective supervisor outlining the new schedule and when the new workweek will begin.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

04/22/2012, 02/05/2014, 06/25/2014, 12/19/2017, 01/01/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR706b			Lead Department: Human Resources		
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy		
Original Date: March 15, 2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024			
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC		
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT	
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC	
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER		
Approval Signature: Sonja Bjork			Approval Date: 02/16/2024		

I. RELATED POLICIES:

- A. [HR610](#)
- B. [HR701](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. 9/80 Alternate Work Schedule: The 9/80 alternate work schedule consists of eight (8) work days of nine (9) hours and one work day of eight (8) hours for a total of eighty (80) hours during two (2) consecutive workweeks. The eight (8) hour work day must be on the same day of the week as the employee's regularly scheduled day off. Therefore, under the 9/80 schedule, one calendar week will consist of 44 hours (four 9-hour days and one 8-hour day) and the alternating calendar week will consist of 36 hours (four 9-hour days and one day off).
- B. Full-Time Employee: For the purpose of this policy, a full time employee is defined as working 80 hours per pay period.
- C. Enrollment: Employees may enroll or request schedule changes at any time during the year. Enrollment is always at the discretion of Management.
- D. 9/80 FLSA Workweek: Under the Fair Labor Standards Act the workweek is defined as "a fixed and regularly recurring period of seven consecutive 24-hour periods (168 hours)." The 9/80 workweek begins on the employee's 8 hour day, exactly four (4) hours after the scheduled start time and ends exactly three (3) hours and fifty-nine (59) minutes after the scheduled start time on the same day the following week. We commonly refer to this as a day divide, where 4 hours of the eight (8) hour day occurs in one week, and 4 hours occurs in the following week. Payroll and Human Resources can answer question about day divides. A visual representation is shown at the end of the policy.

IV. ATTACHMENTS:

- A. [9/80 Schedule Agreement Form](#)

V. PURPOSE:

The purpose of this policy is to outline how Partnership will establish and administer an alternate workweek schedule commonly referred to as a 9/80 workweek.

VI. POLICY / PROCEDURE:

Policy/Procedure Number: HR706b		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

Partnership offers employees a compressed work schedule known as a 9/80 work schedule. This alternate work schedule provides employees with another way to manage work and non-work responsibilities by giving an additional day off of work while still achieving a full-time schedule (80 hours in a two-week work period).

A. Eligibility:

1. All full-time Partnership employees, after completing their introductory requirements, are eligible to participate in the 9/80 work schedule. Individual schedules are set at the discretion of the department director/manager based on business needs and set 9/80 schedules as listed under “Hours of Work.” Employees must have at least 20 hours of PTO in order to apply. Employees not meeting job standards/expectations may not participate in the compressed work schedule until performance meets standards. The director/manager will review such exceptions with Human Resources before denying the option. Once enrolled in the program, participation in the program may be discontinued due to personal hardship, if there is a decline in service levels, if the employee exhausts their PTO and is utilizing Leave Without Pay or if employee conduct is below standard (see paragraphs within this policy titled “Expectations of Service” and “Expectations of Conduct”). Individuals who do not wish to participate may continue to work a standard 40-hour week.

B. Approval:

1. Before beginning participation in the 9/80 program, employees must complete a “9/80 Workweek Request Form – Nonexempt” and acknowledge they have received and read the policy. They must obtain supervisory approval before submitting the form to the Human Resources Department. Employees cannot begin their 9/80 workweek until they have received a formal approval memo from Payroll.

C. Transitioning:

1. Beginning the 9/80 schedule: When an employee transitions from an 8 hour a day workweek to a 9/80 work schedule, there will be a necessary change in the beginning of the workweek. This results in a situation in which some of the hours fall in both the old workweek and the new workweek. This could result in fewer than 80 hours on your paycheck for that transitional period, or more than 80 hours. If more than 80 hours, a calculation of overtime will be made by Payroll which includes those hours in both the old and new workweeks, and the greater of the two amounts will be paid to the employee at time and a half. Where possible, HR may require you to work a ½ day during your transition week to minimize overtime and ensure you still receive a full paycheck.
2. Transferring Departments: Department directors, at their discretion, may discontinue the employee’s 9/80 schedule, based on the needs of the department.
3. Termination of the Program: The 9/80 Compressed Work schedule is an optional benefit that can be discontinued at any time for any reason at management discretion. Prior to the employee’s removal from the program, the Director/Manager must consult with Human Resources to develop a transition plan.
4. Continued failure to adhere to the expectations, as listed under “Expectations”, will also be cause for discontinuation from the 9/80 program. PTO must be utilized when available, employees are not allowed to voluntarily utilize unprotected Leave Without Pay in order to preserve their PTO balance.

D. Hours of Work:

1. In conjunction with their director/manager, employee will select their flex day and one of the eight scheduled times as follows:

Policy/Procedure Number: HR706b		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

	<u>Start</u>	<u>½ Hour Lunch Between Hours Of</u>	<u>End</u>
Schedule A	5:00 am	9:00 am and 11:00 am	2:30 pm
Schedule B	5:30 am	9:30 am and 11:30 am	3:00 pm
Schedule C	6:00 am	10:00am and 12:00pm	3:30 pm
Schedule D	6:30 am	10:30 am and 12:30 pm	4:00 pm
Schedule E	7:00 am	11:00 pm and 1:00 pm	4:30 pm
Schedule F	7:30 am	11:30 am and 1:30 pm	5:00 pm
Schedule G	8:00 am	12:00 pm and 2:00 pm	5:30 pm
Schedule H	8:30 am	12:30 pm and 2:30 pm	6:00 pm

2. Once the flex day has been selected it cannot be changed during a pay period, such as switching from Monday to Friday, or switching between 1st or 2nd week of the pay period. If a change is requested, it must be submitted on the applicable 9/80 form for approval. All participating employees will enter their requested schedules on the applicable Nonexempt approval form.
3. Day Divide: Employees should NOT clock out for lunch until after four (4) hours into their work day. Employees may be required to take a 1 hour lunch to ensure that business needs are met. The make-up time policy does not apply to the "Day Divide."
4. Paid Time Off and Paid Sick Leave (PTO and PSL): PTO time accrual and PSL lump sum awarded hours will remain the same for participating employees. When an employee takes a day off under the vacation or sick pay policies, the accrual will be depleted by the number of scheduled hours for that day. For example, if an employee takes a PTO or PSL day on one of their 9-hour days, 9 hours of time will be removed from their total available hours.
5. Holiday Pay: Holiday pay shall remain at eight (8) hours. When a holiday falls on a regular nine (9) hour workday, the employee has the option of using one hour of accrued vacation time or working one hour of make-up time (must have prior approval from Director/Manager). When utilizing vacation time the employee must submit a time off request in ADP. Should a holiday fall on an employee's scheduled day off, the employee will be permitted to take another day off in the same work week.
6. Overtime: 9/80 workweeks may not generally correspond with Partnership's pay periods. Therefore, adjustments to overtime compensation due cannot be calculated until the completion of the employee's workweek. This may result in one pay period's delay in the employee receiving the additional compensation.
7. Jury Duty and Bereavement Leave: Pay shall remain at a maximum of up to eight (8) hours per day, in accordance to the leave policies. Should the leave fall on an employee's flex day off, the employee will not receive pay for that day. As stated in the policies, employees will receive pay for each full or partial working day. The employee has the option of using one hour of accrued vacation time or working one hour of make-up time for each day on leave.
8. Bereavement Leave – Up to three (3) days of paid leave
9. Jury Duty – Up to two weeks (10 total business days) of paid leave
10. Spot Bonus Certificates – ½ day off with pay shall remain at a maximum of 4 hours.

E. Expectations:

1. Expectations of Service: The 9/80 work schedule is not an entitlement. The 9/80 work schedule will not be provided at the expense of service to the public and must not adversely affect the organization's or a department's ability to provide coverage and maintain service levels. Department directors, at their discretion, may discontinue participation in the 9/80 by an individual, group, or department, if it is determined that service levels are not being maintained.
2. Expectations of Employee Conduct: Failure to adhere to assigned work hours, tardiness, and excessive absenteeism will lead to revocation of the benefit for the individual. As with weekends,

Policy/Procedure Number: HR706b		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/15/2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

employees must agree to come in on a scheduled day off, if necessary, for an urgent situation. Employees are encouraged to use days off to attend to personal business like medical/dental appointments for themselves and family members.

3. **Expectations of Time Keeping:** Employees are expected to submit any missing punches and electronic time off requests by Payroll's deadline. Failure to do so will result in a warning notification from Payroll to Human Resources, the employee and employee's supervisor, the third notification will result in discontinuation from the program. Notifications are counted per enrollment period. In the event that the employee is absent the supervisor is expected to submit on their behalf.
4. **Expectations of Communication:** Employees are expected to alert key contacts outside and inside the company regarding days off. Typically, this would be accomplished by creating an outgoing voicemail message and an e-mail message that informs others the employee will be out of the office, and who can be contacted for assistance. Employees are also expected to show their time as "Out of Office" on their Outlook calendars.
5. **Expectations of Management:** Directors/Managers are expected to notify Human Resources of any and all changes to work schedule or work hours as soon as they are known. Managers are also expected to be fully aware of this policy and procedure, including how to administer overtime with non-exempt 9/80 employees.
6. **Expectations of Employee:**

F. Procedure:

Responsible Party	Action
Employee	Employee completes the 9/80 Workweek Request Form. Non-exempt employees must complete the form 4 weeks in advance of the requested 9/80 start date. Employee forwards to supervisor for approval.
Supervisor	Supervisor reviews form and approves or denies. If approved, supervisor forwards form to HR.
Human Resources	Reviews request and approves or denies.
Payroll	If approved, Payroll determines new workweek and sends memo (can be via e-mail) to employee and respective supervisor outlining the new schedule and when the new workweek will begin.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

04/22/2012, 02/05/2014, 06/25/2014, 12/19/2017, 02/16/2024

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR710			Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 01/01/2018		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Name of approver			Approval Date: Enter as mm/dd/yyyy	

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR706a](#)
- C. [HR706b](#)
- D. [HR709](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. **Family Member:** Per the Healthy Workplace Healthy Family Act (AB 1522, and amended by AB 304 and SB 3), also known as Paid Sick Leave (PSL), family members are defined as an employee's parent, child, spouse, registered domestic partner, grandparent, grandchild, and sibling.
- B. **Child:** A biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis, regardless of age or dependency status.
- C. **Parent:** A biological, adoptive, or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child.
- D. **Designated Person:** a person designated by you, for whom you may use PSL.
- E. **Temporary Employee:** An employee with temporary status and paid through Partnership HealthPlan of California (Partnership) payroll who works at least 30 days in a calendar year. This does not include temporary agency workers.
- F. **On-call Employee:** An employee who works at least 30 days in a calendar year with on-call status.

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide managers/supervisors with appropriate guidelines for administering Partnership HealthPlan of California's (Partnership) Paid Sick Leave policy, and to communicate to employees their rights with regard to California's Paid Sick Leave laws. This policy satisfies the requirements of the Healthy Workplace Healthy Families Act (AB 1522, as amended by AB 304, SB 3 and SB 616), collectively known as California's Paid Sick Leave laws.

Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 01/01/2018		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

VI. POLICY / PROCEDURE:

This policy applies to all Partnership employees, including full-time, part-time, on-call and temporary, who work at least 30 days within a year.

- A. ~~Full-time e~~Employees will receive ~~450 hours~~ or 5 days (whichever is greater) of Paid Sick Leave (PSL) on January 1 each calendar year. Part-time, on-call and temporary employees will receive 40 hours of PSL on January 1 each calendar year. Leave is not accrued according to hours worked. PSL hours will be counted and recorded separately from other leave hours and each employee's PSL balance will be listed on their paystub or an equivalent document, in accordance with California's Paid Sick Leave laws.
- B. Full-time New hires will receive ~~450 hours~~ or 5 days (whichever is greater) of PSL on their date of hire. Part-Time, on-call, and temporary employees New hires will receive 40 hours of PSL on their date of hire. ~~Employees~~ are eligible to use this leave at the completion of 90 days of employment, regardless of whether their introductory period has been completed or extended. ~~New employees hired on or after October 1 are not eligible to roll over their PSL balance into their PTO bank during the first year of their employment.~~
- C. Unused PSL hours do not carry over into the next will reset each year and are not paid out upon separation of employment.
- ~~D. For employees that are eligible for the Paid Time Off (PTO) program, any unused PSL balance on December 31 of each year will be rolled over into the employee's PTO balance. For On-Call and Temporary employees that are not eligible for the PTO program, their PSL balance will reset to 40 hours or 5 days (whichever is greater) on January 1 each calendar year.~~
- ~~E.D.~~ PSL must be taken in minimum increments of two (2) hours unless total time exceeds regular schedule with the amount of PSL used to be determined by the employee.
- ~~F.E.~~ Under California's Paid Sick Leave laws, employees may use PSL for the following reasons:
 1. For an employee, an employee's family member, or designated person for preventive care or diagnosis, which includes annual physicals or flu shots.
 2. For an employee, an employee's family member, or designated person for care or treatment of an existing health condition.
 - ~~2.3.~~ For an employee, an employee's family member, or designated person to recover from physical/mental illness or injury.
 - ~~3.4.~~ For specified purposes for an employee who is a victim of domestic violence, sexual assault, or stalking.
 - 4.5. As provided by Partnership policy or as permitted by law.
- ~~G.F.~~ If an employee separates employment but reestablishes employment with Partnership within 12 months of the previous separation and within a calendar year, the employee's former balance of PSL will be restored to the employee. Use of PSL is only allowed after 90 days of employment is completed. If the employee completed 90 days of employment prior to separation, then use of PSL is allowed immediately upon the employee's return. If the employee did not complete 90 days of employment, then the employee's days of employment will continue to compute from the number of days previously completed. For example, if the employee left Partnership's employment after 60 days but returned within 12 months, the employee must complete an additional 30 days (i.e. the remainder of 90 days of employment) prior to being eligible to use PSL, regardless of whether the introductory period has been completed.
- ~~H. If an employee exhausts their PSL balance, they may use accrued and unused PTO hours for the same purposes as PSL hours. PTO hours are governed by policy HR701— Paid Time Off (PTO), not by this Paid Sick Leave policy.~~
- ~~I.G.~~ To use PSL, the employee must give their direct supervisor as much advance notice as possible, but no less than one (1) days' notice (via electronic time off request in the ADP Portal) when the need for leave

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Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 01/01/2018		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

is known in advance (as may be the case for a scheduled doctors' visit). However, where the need for PSL is unforeseeable, the employee must give notice as soon as practical, in accordance with policy.

~~J.H.~~ If an employee is requesting sick leave to care for a designated person, the employee must identify the designated person upon request. Unless otherwise permitted by law, the employee may choose only one designated person in any 12-month period.

~~K.I.~~ HR511 – Attendance and Punctuality.

1. If you are absent from work and you do not know your return date, you must call your direct supervisor each day before you are scheduled to start work.
2. If you are absent without notification to your direct report or department's attendance line within two hours after your start time you will be considered to have voluntarily resigned. Exceptions to this procedure may be made if it is determined by Partnership that the employee's absence was due to extenuating circumstances beyond the employee's control, and which prohibited timely notification of the absence.
3. Absences taken in accordance with this PSL policy will not be considered as "an occurrence" or as an "unexcused absence."

~~L.J.~~ In accordance with California's Paid Sick Leave laws, Partnership does not require an employee to find a replacement as a condition for using PSL.

~~M.K.~~ In accordance with California's Paid Sick Leave laws, Partnership does not discriminate or retaliate in any way against employees who exercise their rights to request and use PSL.

~~Partnership recognizes the need and benefit of taking time off work for an employee's mental wellness. Accordingly, available PSL hours outlined in this policy may be used for that purpose.~~

VII. REFERENCES:

- A. California Sick Leave laws (Healthy Workplace Healthy Families act of 2014, AB 1522, as amended by AB 304, SB 3 and SB 616)

VIII. DISTRIBUTION:

- A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll, Supervisors, Managers, Directors

X. REVISION DATES:

12/19/2017, 06/25/2020, 01/01/2022, 01/01/2023, 05/24/2023, 07/31/2023, 01/01/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR710			Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 01/01/2018		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 01/01/2024	

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR706a](#)
- C. [HR706b](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. **Family Member:** Per the Healthy Workplace Healthy Family Act (AB 1522, and amended by AB 304 and SB 3), also known as Paid Sick Leave (PSL), family members are defined as an employee's parent, child, spouse, registered domestic partner, grandparent, grandchild, and sibling.
- B. **Child:** A biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis, regardless of age or dependency status.
- C. **Parent:** A biological, adoptive, or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child.
- D. **Designated Person:** a person designated by you, for whom you may use PSL.
- E. **Temporary Employee:** An employee with temporary status and paid through Partnership HealthPlan of California (Partnership) payroll who works at least 30 days in a calendar year. This does not include temporary agency workers.
- F. **On-call Employee:** An employee who works at least 30 days in a calendar year with on-call status.

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide managers/supervisors with appropriate guidelines for administering Partnership HealthPlan of California's (Partnership) Paid Sick Leave policy, and to communicate to employees their rights with regard to California's Paid Sick Leave laws. This policy satisfies the requirements of the Healthy Workplace Healthy Families Act (AB 1522, as amended by AB 304, SB 3 and SB 616), collectively known as California's Paid Sick Leave laws.

VI. POLICY / PROCEDURE:

This policy applies to all Partnership employees, including full-time, part-time, on-call and temporary, who

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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

work at least 30 days within a year.

- A. Full-time employees will receive 50 hours or 5 days of Paid Sick Leave (PSL) on January 1 each calendar year. Part-time, on-call and temporary employees will receive 40 hours of PSL on January 1 each calendar year. Leave is not accrued according to hours worked. PSL hours will be counted and recorded separately from other leave hours and each employee's PSL balance will be listed on their paystub or an equivalent document, in accordance with California's Paid Sick Leave laws.
- B. Full-time New hires will receive 50 hours or 5 days of PSL on their date of hire. Part-Time, on-call, and temporary employees will receive 40 hours of PSL on their date of hire. Employees are eligible to use this leave at the completion of 90 days of employment, regardless of whether their introductory period has been completed or extended.
- C. Unused PSL hours do not carry over into the next year and are not paid out upon separation of employment.
- D. PSL must be taken in minimum increments of two (2) hours unless total time exceeds regular schedule with the amount of PSL used to be determined by the employee.
- E. Under California's Paid Sick Leave laws, employees may use PSL for the following reasons:
 1. For an employee, an employee's family member, or designated person for preventive care or diagnosis, which includes annual physicals or flu shots.
 2. For an employee, an employee's family member, or designated person for care or treatment of an existing health condition.
 3. For an employee, an employee's family member, or designated person to recover from physical/mental illness or injury.
 4. For specified purposes for an employee who is a victim of domestic violence, sexual assault, or stalking.
 5. As provided by Partnership policy or as permitted by law.
- F. If an employee separates employment but reestablishes employment with Partnership within 12 months of the previous separation and within a calendar year, the employee's former balance of PSL will be restored to the employee. Use of PSL is only allowed after 90 days of employment is completed. If the employee completed 90 days of employment prior to separation, then use of PSL is allowed immediately upon the employee's return. If the employee did not complete 90 days of employment, then the employee's days of employment will continue to compute from the number of days previously completed. For example, if the employee left Partnership's employment after 60 days but returned within 12 months, the employee must complete an additional 30 days (i.e. the remainder of 90 days of employment) prior to being eligible to use PSL, regardless of whether the introductory period has been completed.
- G. To use PSL, the employee must give their direct supervisor as much advance notice as possible, but no less than one (1) days' notice (via electronic time off request in the ADP Portal) when the need for leave is known in advance (as may be the case for a scheduled doctors' visit). However, where the need for PSL is unforeseeable, the employee must give notice as soon as practical, in accordance with policy.
- H. If an employee is requesting sick leave to care for a designated person, the employee must identify the designated person upon request. Unless otherwise permitted by law, the employee may choose only one designated person in any 12-month period.
- I. HR511 – Attendance and Punctuality.
 1. If you are absent from work and you do not know your return date, you must call your direct supervisor each day before you are scheduled to start work.
 2. If you are absent without notification to your direct report or department's attendance line within two hours after your start time you will be considered to have voluntarily resigned. Exceptions to this procedure may be made if it is determined by Partnership that the employee's absence was due to extenuating circumstances beyond the employee's control, and which prohibited timely

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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

notification of the absence.

3. Absences taken in accordance with this PSL policy will not be considered as “an occurrence” or as an “unexcused absence.”
- J. In accordance with California’s Paid Sick Leave laws, Partnership does not require an employee to find a replacement as a condition for using PSL.
- K. In accordance with California’s Paid Sick Leave laws, Partnership does not discriminate or retaliate in any way against employees who exercise their rights to request and use PSL.

VII. REFERENCES:

- A. California Sick Leave laws (Healthy Workplace Healthy Families act of 2014, AB 1522, as amended by AB 304, SB 3 and SB 616)

VIII. DISTRIBUTION:

- A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources, Payroll, Supervisors, Managers, Directors

X. REVISION DATES:

12/19/2017, 06/25/2020, 01/01/2022, 01/01/2023, 05/24/2023, 07/31/2023, 01/01/2024

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY/ PROCEDURE

Policy/Procedure Number: HR712			Lead Department: Human Resources	
Policy/Procedure Title: Other Leaves			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 12/03/2020		Next Review Date: 01/01/2025 05/08/2025 Last Review Date: 01/01/2024 05/08/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 01/01/2024	

I. RELATED POLICIES:

- A. [HR703](#)
- B. [HR704](#)
- C. [HR704a](#)
- D. [HR708](#)
- E. [HR710](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. N/A

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide Directors/Managers/Supervisors and employees appropriate information and procedures regarding other types of leaves unrelated to Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Family Medical Leave (HR703)

VI. POLICY / PROCEDURE:

- A. Unless otherwise stated below or required by law, the following conditions apply:
 - 1. You must use accrued PTO hours for any absence, before taking the remainder of the leave unpaid
 - 2. You do not earn any additional time off during unpaid leave.
 - 3. You are not eligible for Partnership holidays during unpaid leave or any leave of absence.
 - 4. You must provide your supervisor and the Human Resources Department reasonable advanced notice of your need to take time off or as permitted by law.
- B. Military Leave
 - 1. Employees who are called to active duty or inactive duty training in the U.S. Armed Forces, U.S. or California Reserves, U.S. or California National Guard, or Naval Militia may take military leave. The time off will be unpaid unless otherwise required by law. However, employees may use any accrued, unused paid time off for this purpose. During leave, the employee's length of service accumulates, and the employee's benefits will continue as required by law.

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C. Leave for Spouses of Active Military Personnel

1. If an employee works a minimum of 20 hours per week, they may take up to 10 days of unpaid time off to spend time with their spouse or registered domestic partner who is a qualified member of the Armed Forces, National Guard, or Reserves, and who is granted leave from deployment during a period of military conflict. The employee must request time off under this policy within two (2) days of receiving notice that their spouse or registered domestic partner will be on leave and submit written documentation certifying that the service member will be on leave from deployment during the time the leave is requested.

D. School Appearance and Child Care Activity Leave

1. School Appearance Leave
 - a. Employees who are required to appear at his/her child's or ward's school in connection with a disciplinary action by the school, may be required to submit a copy of the written notice or some other certification from the school stating that the employee's presence is required.
2. School and Child Care Activity Leave
 - a. Employees often want to take time off to participate in a child's school or child care related activities, such as teacher conferences, award ceremonies or school plays. They also may need time off to deal with enrolling children in school or in child care, or for school or child care emergencies. Covered employees may take up to 40 hours each year for the specified school and child care activities. Partnership may require documentation from the school or child care provider that he/she was engaged in the below permitted child-related activities.
 - b. Covered employees are the "parents" of children of the age to attend kindergarten through grade 12, or a licensed child care provider, are eligible for this protected leave. "Parents" are defined to include the following eligible employees: parents, guardians, grandparents, stepparents, foster parents or a person standing in *loco parentis* to a child.
 - c. A covered employee can use this time off for the following reasons and under the following guidelines:
 - 1) To find, enroll, or re-enroll a child in school or with a licensed child care provider;
 - 2) To participate in activities of the school or licensed child care provider;
 - 3) The time must not exceed 40 hours per year, nor 8 hours in a calendar month; and
 - 4) The employee must give reasonable advanced notice of the planned absence to his/her supervisor and notify HRHelpdesk@partnership.org.
 - d. Employees can also use this leave to address a "child care provider or school emergency." There is not an 8 hour per calendar month limitation with this emergency usage, and employees must notify their supervisor and HRHelpdesk@partnership.org. A child care provider or school emergency means that the employee's child cannot remain in a school or with a child care provider due to one of the following:
 - 1) The school or child care provider has requested that the child be picked up, or has an attendance policy (excluding planned holidays) that prohibits the child from attending or requires the child to be picked up;
 - 2) Behavioral or discipline problems;
 - 3) Closure or unexpected unavailability of the school or child care provider, excluding planned holidays; or
 - 4) A natural disaster, including, but not limited to, fire, earthquake or flood.

E. Voting Time

1. Partnership provides up to two (2) hours of paid time off to vote in statewide public elections if an employee does not have sufficient time outside of working hours. Employees may take only the time they actually need to go to the polls. Employees must present a voting receipt as documentation that they went to the polls.
2. Time off must be taken at the beginning or end of the regular work schedule, whichever allows the most free time for voting and the least time off from work.

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3. Employees must notify their direct supervisor or Human Resources of their need for time off under this policy at least two (2) working days prior to Election Day.
4. Any additional time off will be without pay for non-exempt employees.
5. Employees may also take time off to serve as an election official. Time off to serve as an election officer is unpaid, unless the employee utilizes PTO.

F. Personal Leave

1. A personal leave without pay may be granted for up to thirty (30) calendar days at the supervisor's discretion. Requests must be submitted and approved in writing by the supervisor and Human Resources Management before the leave begins. The employee may request a personal leave only after having completed ninety (90) calendar days of service. Employees must use any accrued but unused PTO before taking leave without pay; however, the use of paid leave will not extend the duration of the leave, and the employee must comply with all Partnership policies regarding the use of paid leave. Employees will not earn any additional time off during unpaid ~~their~~ leave but will accrue prorated PTO based on hours paid to them by Partnership.
2. Eligibility for any Partnership -paid health benefits ceases the first of the month following the Personal Leave start date. Employees must pay the entire premiums if they choose to receive such benefits. Employees will receive notice directly from Partnership's third-party administrator of their right to continue benefits through COBRA. Your eligibility to receive medical and/or dental/vision credit payments will also cease the first of the month following the Personal Leave start date.
3. If an employee does not return to work on the expiration of their personal leave, this may be deemed a voluntary resignation of employment with Partnership . Employees may not accept other work during a personal leave without prior written approval of the Human Resources Department.
4. Partnership will attempt to return the employee to their current or a comparable position at the conclusion of their leave, but reinstatement is not guaranteed.

G. Additional Leaves

1. If you feel that you may qualify for any of the additional leave types listed below, please contact HRHelpdesk@partnershiphp.org for more information.
 - a. Jury Duty
 - 1) If you receive a jury summons, you must provide Human Resources (HR) and your supervisor with a copy.
 - 2) If you are not excused from jury duty or your work schedule cannot be rearranged to avoid conflict, you will be allowed to take time off with pay for each full or partial working day you serve on jury duty for up to two (2) weeks, not to exceed eight (8) hours per day. Maximum time off permitted for jury duty without pay is unlimited.
 - 3) You must report to work on days or parts of days when you are not required to serve on a jury.
 - 4) Employees must obtain from the Court Clerk and submit to Payroll and their supervisor, a statement verifying days and hours of jury service performed.
 - 5) If you do not return to work immediately after approved time off for jury duty, Partnership may assume you voluntarily quit your job.
 - 6) Compensation received from the Court during the initial two (2) week period must be paid to Partnership (travel and subsistence may be retained) or can be donated to a court-recommended charity. Proof of charity must be submitted to the Finance department.
 - 7) Non-expert witness: You may be required by law to appear in court as a witness. You must submit a copy of the subpoena to HR and your supervisor. Employees will be granted up to two (2) days, not to exceed eight (8) hours per day, witness time off with pay, per year. The balance of the necessary time off is without pay. You must report to work on days or parts of days when you are not required to serve as a non-expert witness. Reimbursement in the amount of a witness fee received for testimony must be paid to Partnership by the employee for the days for which an employee receives compensation from Partnership.

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b. Bereavement Leave

- 1) Immediate family is defined as spouse, child, parent, sibling, grandparent, grandchild, parent-in-law, sibling in-law, step-parents/step-siblings, or domestic partner.
- 2) Eligibility Criteria
 - a) Employees will be granted up to five (5) days of bereavement leave for immediate family members. Under this policy, three (3) days of bereavement leave is paid, not to exceed eight (8) hours per day, ~~and~~
 - ~~a)b)~~ ~~Two~~ (2) additional days may be taken as PTO, PSL or LWOP, not limited to 8 hours.
 - ~~b)c)~~ The bereavement leave may be used intermittently but must be completed within three (3) months from the date of death of the immediate family member.
 - ~~e)d)~~ Employees may take bereavement leave regardless of their introductory ninety (90) day period.
 - ~~d)e)~~ Employees must notify their direct supervisor via phone, voicemail, email, or in-person, of the need for bereavement leave.
- 3) Acknowledgement
 - a) Generally, Partnership HealthPlan of California (~~Partnership PHC~~) will send flowers or a plant to the funeral home or church for the viewing, memorial service, or directly to the employee in memory of the family member.
 - b) Generally, ~~Partnership PHC~~ will send sympathy cards to employees to acknowledge the loss of a family member that is not included above in the immediate family.

b. Organ and Bone Marrow Donor Leave

- 1) Employees who are organ donors may be eligible for a paid leave of absence up to 30 business days in any one-year period, and an additional unpaid leave of absence, up to 30 business days of unpaid leave in any one-year period. Bone marrow donors may be eligible for a paid leave of absence up to five business days in any one-year period, calculated from the date the employee's leave begins.

c. Reproductive Loss Leave

- 1) Reproductive loss is defined as failed adoption, failed surrogacy, miscarriage, stillbirth, or unsuccessful assisted reproduction, if you were to be the parent.
- 2) Eligibility Criteria
 - a) Employees will be granted up to five (5) days of reproductive loss leave for qualifying reproductive losses, up to a maximum of 20 days in any 12-month period.
 - b) Reproductive loss leave is unpaid, but may be taken as PTO, PSL, or LWOP.
 - c) The reproductive loss leave may be used intermittently, but must be completed within three (3) months from the date of the loss; or, if an employee is on another form of leave provided by law when the loss occurred (or took leave immediately after the loss), within three months of the end of that leave.
 - d) Employees may take reproductive loss leave regardless of their introductory ninety (90) day period.
- 3) Employees must notify their direct supervisor via phone, voicemail, email, or in-person, of the need for bereavement leave.

c. Time Off to Attend Judicial Proceedings for Crime Victims

- 1) Employees may be eligible to take leave for judicial proceedings related to specified serious crimes and leave for any proceeding involving victims' rights. Note that this leave is separate from Jury or Witness Duty Leave.

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- 2) Time off from work for judicial proceedings must be related to a violent felony, serious felony, felony theft or felony embezzlement.
 - 3) Leave for any proceeding involving victims' rights for an employee or family member who has suffered direct or threatened physical, psychological, or financial harm as a result of the commission or attempted commission of a crime or a delinquent act includes time off from work to appear in court to be heard at any proceeding in which a right of the victim is at issue for a covered offense.
- d. Time Off and Reasonable Accommodation or Victims of Crime
- 1) Employees who are victims of a crime (including domestic violence, sexual assault, stalking, or a crime resulting in physical injury or psychological injury relating to a threat of physical injury) or experience the death of a family member (spouse, domestic partner, child, parent, sibling, or equivalent) as a result of a crime may be eligible to take time off for legal proceedings or for medical treatment.
 - 2) Eligible reasons for leave include time off to:
 - a) Obtain or attempt to obtain any relief, including, but not limited to, a temporary restraining order, restraining order, or other injunctive relief to help ensure the employee's health, safety, or welfare, or that of the employee's child;
 - b) Seek medical attention for injuries caused by crime or abuse;
 - c) Obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of crime or abuse;
 - d) Obtain psychological counseling or mental health services related to an experience of crime or abuse; or
 - e) Participate in safety planning and take other actions to increase safety from future crime or abuse, including temporary or permanent relocation.
 - 3) Partnership also will provide a reasonable accommodation for ensuring the employee's safety while at work, unless doing so would create an undue hardship for Partnership. Such accommodation may include a transfer, reassignment, modified schedule, changed work telephone, installed lock, implemented safety procedure, or other adjustment to a job structure, workplace facility, or work requirement. Where possible, employees should provide their supervisor or Human Resources reasonable notice of their need to take time off under this policy and/or need for an accommodation. Partnership may require proof of the employee's participation in the activities covered by this policy and/or certification regarding the employee's need for the accommodation.
 - 4) Partnership will not discharge, threaten with discharge, demote, suspend, or in any other manner discriminate or retaliate against an employee in the terms and conditions of employment because the employee has taken time off under this policy. Employees who believe someone has violated this policy against discrimination and retaliation should report it to Human Resources or another member of management immediately.
 - 5) Employees may use PTO and/or sick leave for any absence under this policy. Otherwise, the time off will be unpaid.
 - 6) Leave under this policy does not extend the maximum time off available under the "Family and Medical Leave" policy in Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Family and Medical Leave (HR703).
- e. Volunteer Emergency Duty Leave
- 1) Leave provided to employees who are required to perform emergency duty. Employees must notify Partnership at the time they are designated as emergency rescue personnel and then again when the employee learns they will be deployed for emergency duty. This leave

Policy/Procedure Number: HR712		Lead Department: Human Resources
Policy/Procedure Title: Other Leaves		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy
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is applicable to the following individuals:

- a) Volunteer firefighters
- b) Reserve peace officers
- c) Emergency rescue personnel, defined as any person who is an officer, employee or member of:
 - i. A fire department, fire protection, or firefighting agency or the federal government, California state government, local government, special district, or other public or municipal corporation or political subdivision of California;
 - ii. An officer of a sheriff's, police, or private fire department.
- 2) A temporary leave of up to 14 days per calendar year for an employee to engage in fire, law enforcement or emergency rescue training may also be granted.
- f. Civil Air Patrol Leave
 - 1) Up to 10 days of leave per year for an employee who is a volunteer member of the California Wing of the civilian auxiliary of the U.S. Air Force Civil Air Patrol, responding to an emergency operation mission.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. Power DMS

IX. DEPARTMENT RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 01/31/2021, 06/09/2021, 01/01/2023, 06/14/202, 01/01/2024, 05/08/2024

PREVIOUSLY APPLIED TO:

**PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY/ PROCEDURE**

Policy/Procedure Number: HR712			Lead Department: Human Resources	
Policy/Procedure Title: Other Leaves			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 12/03/2020		Next Review Date: 05/08/2025 Last Review Date: 05/08/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input checked="" type="checkbox"/> Employees		
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 05/16/2024	

I. RELATED POLICIES:

- A. [HR703](#)
- B. [HR704](#)
- C. [HR704a](#)
- D. [HR708](#)
- E. [HR710](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. N/A

IV. ATTACHMENTS:

- A. N/A

V. PURPOSE:

To provide Directors/Managers/Supervisors and employees appropriate information and procedures regarding other types of leaves unrelated to Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Family Medical Leave (HR703)

VI. POLICY / PROCEDURE:

- A. Unless otherwise stated below or required by law, the following conditions apply:
 - 1. You must use accrued PTO hours for any absence, before taking the remainder of the leave unpaid
 - 2. You do not earn any additional time off during unpaid leave.
 - 3. You are not eligible for Partnership holidays during unpaid leave or any leave of absence.
 - 4. You must provide your supervisor and the Human Resources Department reasonable advanced notice of your need to take time off or as permitted by law.
- B. Military Leave
 - 1. Employees who are called to active duty or inactive duty training in the U.S. Armed Forces, U.S. or California Reserves, U.S. or California National Guard, or Naval Militia may take military leave. The time off will be unpaid unless otherwise required by law. However, employees may use any accrued, unused paid time off for this purpose. During leave, the employee's length of service accumulates, and the employee's benefits will continue as required by law.

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C. Leave for Spouses of Active Military Personnel

1. If an employee works a minimum of 20 hours per week, they may take up to 10 days of unpaid time off to spend time with their spouse or registered domestic partner who is a qualified member of the Armed Forces, National Guard, or Reserves, and who is granted leave from deployment during a period of military conflict. The employee must request time off under this policy within two (2) days of receiving notice that their spouse or registered domestic partner will be on leave and submit written documentation certifying that the service member will be on leave from deployment during the time the leave is requested.

D. School Appearance and Child Care Activity Leave

1. School Appearance Leave
 - a. Employees who are required to appear at his/her child's or ward's school in connection with a disciplinary action by the school, may be required to submit a copy of the written notice or some other certification from the school stating that the employee's presence is required.
2. School and Child Care Activity Leave
 - a. Employees often want to take time off to participate in a child's school or child care related activities, such as teacher conferences, award ceremonies or school plays. They also may need time off to deal with enrolling children in school or in child care, or for school or child care emergencies. Covered employees may take up to 40 hours each year for the specified school and child care activities. Partnership may require documentation from the school or child care provider that he/she was engaged in the below permitted child-related activities.
 - b. Covered employees are the "parents" of children of the age to attend kindergarten through grade 12, or a licensed child care provider, are eligible for this protected leave. "Parents" are defined to include the following eligible employees: parents, guardians, grandparents, stepparents, foster parents or a person standing in *loco parentis* to a child.
 - c. A covered employee can use this time off for the following reasons and under the following guidelines:
 - 1) To find, enroll, or re-enroll a child in school or with a licensed child care provider;
 - 2) To participate in activities of the school or licensed child care provider;
 - 3) The time must not exceed 40 hours per year, nor 8 hours in a calendar month; and
 - 4) The employee must give reasonable advanced notice of the planned absence to his/her supervisor and notify HRHelpdesk@partnership.org.
 - d. Employees can also use this leave to address a "child care provider or school emergency." There is not an 8 hour per calendar month limitation with this emergency usage, and employees must notify their supervisor and HRHelpdesk@partnership.org. A child care provider or school emergency means that the employee's child cannot remain in a school or with a child care provider due to one of the following:
 - 1) The school or child care provider has requested that the child be picked up, or has an attendance policy (excluding planned holidays) that prohibits the child from attending or requires the child to be picked up;
 - 2) Behavioral or discipline problems;
 - 3) Closure or unexpected unavailability of the school or child care provider, excluding planned holidays; or
 - 4) A natural disaster, including, but not limited to, fire, earthquake or flood.

E. Voting Time

1. Partnership provides up to two (2) hours of paid time off to vote in statewide public elections if an employee does not have sufficient time outside of working hours. Employees may take only the time they actually need to go to the polls. Employees must present a voting receipt as documentation that they went to the polls.
2. Time off must be taken at the beginning or end of the regular work schedule, whichever allows the most free time for voting and the least time off from work.

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3. Employees must notify their direct supervisor or Human Resources of their need for time off under this policy at least two (2) working days prior to Election Day.
 4. Any additional time off will be without pay for non-exempt employees.
 5. Employees may also take time off to serve as an election official. Time off to serve as an election officer is unpaid, unless the employee utilizes PTO.
- F. Personal Leave
1. A personal leave without pay may be granted for up to thirty (30) calendar days at the supervisor's discretion. Requests must be submitted and approved in writing by the supervisor and Human Resources Management before the leave begins. The employee may request a personal leave only after having completed ninety (90) calendar days of service. Employees must use any accrued but unused PTO before taking leave without pay; however, the use of paid leave will not extend the duration of the leave, and the employee must comply with all Partnership policies regarding the use of paid leave. Employees will not earn any additional time off during unpaid ~~their~~ leave but will accrue prorated PTO based on hours paid to them by Partnership.
 2. Eligibility for any Partnership -paid health benefits ceases the first of the month following the Personal Leave start date. Employees must pay the entire premiums if they choose to receive such benefits. Employees will receive notice directly from Partnership's third-party administrator of their right to continue benefits through COBRA. Your eligibility to receive medical and/or dental/vision credit payments will also cease the first of the month following the Personal Leave start date.
 3. If an employee does not return to work on the expiration of their personal leave, this may be deemed a voluntary resignation of employment with Partnership. Employees may not accept other work during a personal leave without prior written approval of the Human Resources Department.
 4. Partnership will attempt to return the employee to their current or a comparable position at the conclusion of their leave, but reinstatement is not guaranteed.
- G. Additional Leaves
1. If you feel that you may qualify for any of the additional leave types listed below, please contact HRHelpdesk@partnershiphp.org for more information.
 - a. Jury Duty
 - 1) If you receive a jury summons, you must provide Human Resources (HR) and your supervisor with a copy.
 - 2) If you are not excused from jury duty or your work schedule cannot be rearranged to avoid conflict, you will be allowed to take time off with pay for each full or partial working day you serve on jury duty for up to two (2) weeks, not to exceed eight (8) hours per day. Maximum time off permitted for jury duty without pay is unlimited.
 - 3) You must report to work on days or parts of days when you are not required to serve on a jury.
 - 4) Employees must obtain from the Court Clerk and submit to Payroll and their supervisor, a statement verifying days and hours of jury service performed.
 - 5) If you do not return to work immediately after approved time off for jury duty, Partnership may assume you voluntarily quit your job.
 - 6) Compensation received from the Court during the initial two (2) week period must be paid to Partnership (travel and subsistence may be retained) or can be donated to a court-recommended charity. Proof of charity must be submitted to the Finance department.
 - 7) Non-expert witness: You may be required by law to appear in court as a witness. You must submit a copy of the subpoena to HR and your supervisor. Employees will be granted up to two (2) days, not to exceed eight (8) hours per day, witness time off with pay, per year. The balance of the necessary time off is without pay. You must report to work on days or parts of days when you are not required to serve as a non-expert witness. Reimbursement in the amount of a witness fee received for testimony must be paid to Partnership by the employee for the days for which an employee receives compensation from Partnership.

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Policy/Procedure Title: Other Leaves		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy
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b. Bereavement Leave

- 1) Immediate family is defined as spouse, child, parent, sibling, grandparent, grandchild, parent-in-law, sibling in-law, step-parents/step-siblings, or domestic partner.
- 2) Eligibility Criteria
 - a) Employees will be granted up to five (5) days of bereavement leave for immediate family members. Under this policy, three (3) days of bereavement leave is paid, not to exceed eight (8) hours per day.
 - b) Two (2) additional days may be taken as PTO, PSL or LWOP, not limited to 8 hours.
 - c) The bereavement leave may be used intermittently but must be completed within three (3) months from the date of death of the immediate family member.
 - d) Employees may take bereavement leave regardless of their introductory ninety (90) day period.
 - e) Employees must notify their direct supervisor via phone, voicemail, email, or in-person, of the need for bereavement leave.
- 3) Acknowledgement
 - a) Generally, Partnership HealthPlan of California (Partnership) will send flowers or a plant to the funeral home or church for the viewing, memorial service, or directly to the employee in memory of the family member.
 - b) Generally, Partnership will send sympathy cards to employees to acknowledge the loss of a family member that is not included above in the immediate family.

b. Organ and Bone Marrow Donor Leave

- 1) Employees who are organ donors may be eligible for a paid leave of absence up to 30 business days in any one-year period, and an additional unpaid leave of absence, up to 30 business days of unpaid leave in any one-year period. Bone marrow donors may be eligible for a paid leave of absence up to five business days in any one-year period, calculated from the date the employee's leave begins.

c. Reproductive Loss Leave

- 1) Reproductive loss is defined as failed adoption, failed surrogacy, miscarriage, stillbirth, or unsuccessful assisted reproduction, if you were to be the parent.
- 2) Eligibility Criteria
 - a) Employees will be granted up to five (5) days of reproductive loss leave for qualifying reproductive losses, up to a maximum of 20 days in any 12-month period.
 - b) Reproductive loss leave is unpaid, but may be taken as PTO, PSL, or LWOP.
 - c) The reproductive loss leave may be used intermittently, but must be completed within three (3) months from the date of the loss; or, if an employee is on another form of leave provided by law when the loss occurred (or took leave immediately after the loss), within three months of the end of that leave.
 - d) Employees may take reproductive loss leave regardless of their introductory ninety (90) day period.
- 3) Employees must notify their direct supervisor via phone, voicemail, email, or in-person, of the need for bereavement leave.

c. Time Off to Attend Judicial Proceedings for Crime Victims

- 1) Employees may be eligible to take leave for judicial proceedings related to specified serious crimes and leave for any proceeding involving victims' rights. Note that this leave is separate from Jury or Witness Duty Leave.

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- 2) Time off from work for judicial proceedings must be related to a violent felony, serious felony, felony theft or felony embezzlement.
 - 3) Leave for any proceeding involving victims' rights for an employee or family member who has suffered direct or threatened physical, psychological, or financial harm as a result of the commission or attempted commission of a crime or a delinquent act includes time off from work to appear in court to be heard at any proceeding in which a right of the victim is at issue for a covered offense.
- d. Time Off and Reasonable Accommodation or Victims of Crime
- 1) Employees who are victims of a crime (including domestic violence, sexual assault, stalking, or a crime resulting in physical injury or psychological injury relating to a threat of physical injury) or experience the death of a family member (spouse, domestic partner, child, parent, sibling, or equivalent) as a result of a crime may be eligible to take time off for legal proceedings or for medical treatment.
 - 2) Eligible reasons for leave include time off to:
 - a) Obtain or attempt to obtain any relief, including, but not limited to, a temporary restraining order, restraining order, or other injunctive relief to help ensure the employee's health, safety, or welfare, or that of the employee's child;
 - b) Seek medical attention for injuries caused by crime or abuse;
 - c) Obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of crime or abuse;
 - d) Obtain psychological counseling or mental health services related to an experience of crime or abuse; or
 - e) Participate in safety planning and take other actions to increase safety from future crime or abuse, including temporary or permanent relocation.
 - 3) Partnership also will provide a reasonable accommodation for ensuring the employee's safety while at work, unless doing so would create an undue hardship for Partnership. Such accommodation may include a transfer, reassignment, modified schedule, changed work telephone, installed lock, implemented safety procedure, or other adjustment to a job structure, workplace facility, or work requirement. Where possible, employees should provide their supervisor or Human Resources reasonable notice of their need to take time off under this policy and/or need for an accommodation. Partnership may require proof of the employee's participation in the activities covered by this policy and/or certification regarding the employee's need for the accommodation.
 - 4) Partnership will not discharge, threaten with discharge, demote, suspend, or in any other manner discriminate or retaliate against an employee in the terms and conditions of employment because the employee has taken time off under this policy. Employees who believe someone has violated this policy against discrimination and retaliation should report it to Human Resources or another member of management immediately.
 - 5) Employees may use PTO and/or sick leave for any absence under this policy. Otherwise, the time off will be unpaid.
 - 6) Leave under this policy does not extend the maximum time off available under the "Family and Medical Leave" policy in Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Family and Medical Leave (HR703).
- e. Volunteer Emergency Duty Leave
- 1) Leave provided to employees who are required to perform emergency duty. Employees must notify Partnership at the time they are designated as emergency rescue personnel and then again when the employee learns they will be deployed for emergency duty. This leave

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is applicable to the following individuals:

- a) Volunteer firefighters
- b) Reserve peace officers
- c) Emergency rescue personnel, defined as any person who is an officer, employee or member of:
 - i. A fire department, fire protection, or firefighting agency or the federal government, California state government, local government, special district, or other public or municipal corporation or political subdivision of California;
 - ii. An officer of a sheriff's, police, or private fire department.
- 2) A temporary leave of up to 14 days per calendar year for an employee to engage in fire, law enforcement or emergency rescue training may also be granted.
- f. Civil Air Patrol Leave
 - 1) Up to 10 days of leave per year for an employee who is a volunteer member of the California Wing of the civilian auxiliary of the U.S. Air Force Civil Air Patrol, responding to an emergency operation mission.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. Power DMS

IX. DEPARTMENT RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 01/31/2021, 06/09/2021, 01/01/2023, 06/14/202, 01/01/2024, 05/08/2024

PREVIOUSLY APPLIED TO:

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR803			Lead Department: Human Resources	
Policy/Procedure Title: Workers' Compensation			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 10/01/1994		Next Review Date: 01/01/2024 08/05/2025 Last Review Date: 01/01/2023 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Liz Gibbon Sonja Bjork			Approval Date: 03/23/2018	

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR703](#)
- C. [HR704](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS: N/A**IV. ATTACHMENTS:**

- A. [Employee's Accident Report](#)
- B. [Supervisor's Report of Employee Accident](#)
- C. [Witness' Report/Statement of Employee Accident](#)

V. PURPOSE:

To provide Directors/Managers with appropriate guidelines regarding Partnership HealthPlan of California's (~~PHC~~Partnership) intent to comply with all state and federal regulations pertaining to Workers' Compensation.

VI. POLICY / PROCEDURE:**A. POLICY:**

1. ~~Partnership PHC~~ provides a Workers' Compensation Insurance program at no cost to employees. This program covers any injury or illness sustained in the course of employment that requires medical, surgical or hospital treatment. Subject to applicable legal requirements, Workers' Compensation Insurance provides benefits after a short waiting period or, if the employee is hospitalized, immediately upon hospitalization.
2. Employees who sustain work related injuries or illnesses should inform their Director/Manager immediately (if Director/Manager is unavailable, contact Human Resources). No matter how minor an on-the-job injury may appear, it is important that it be reported immediately. This will enable an eligible employee to qualify for coverage as quickly as possible.

B. PROCEDURE:

1. Employees
 - a. Report any work-related injuries or illness to Directors/Managers and Human Resources as soon as possible.
 - b. If any loss time from work occurs, contact Human Resources immediately to discuss Workers'

Policy/Procedure Number: HR803		Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

Compensation benefits, etc.

2. Director/Manager
 - a. When an employee reports any work-related injury or illness, and is seen by a physician, the following occurs:
 - b. Report injury/illness immediately to Human Resources.
 - c. Complete the "Incident Investigation Report" (Attachment A).
1. If employee needs treatment, he or she will be sent to ~~our preferred~~ provider within the Medical Provider Network (MPN) unless employee has designated their personal physician PRIOR to their injury. Medical Provider Network (MPN): Phone: 888-495-8949 Provider Search: <https://bhhc.com/workers-compensation/medical-networks/>
2. ~~Partnership PHC~~ Medical Provider Network Treatment Preferred Provider Locations:
 - a. **NORTHBAY OCCUPATIONAL HEALTH**
 2470 Hilborn Rd. ~~oad~~, Suite 100, Fairfield, CA 94533
 Phone: 707-~~429-7701~~646-4600/ Fax: 707-~~646-4601~~429-6911
 Hours: Monday through Friday, 7:30AM – 5:00PM
 - b. ~~HILLTOP MEDICAL CLINIC~~ **KAISER ON-THE-JOB**
2123 Eureka Way, Redding, CA 96001 3975 Old Redwood Hwy MOB 5 STE 152 Santa Rosa, CA 95403
 Phone: ~~707-566-5555~~530-246-4629/ Fax: 530-246-4621
 Hours: Monday through Friday, ~~8:00~~30AM – 5:4500PM; Saturday, 9:00AM – 4:45PM
 - c. ~~PULSE URGENT CARE~~ **HILLTOP MEDICAL CLINIC**
100 E Cypress Ave 1093 Hilltop Drive, Redding, CA 96002
 Phone: 530-~~722-1111~~221-1565/ Fax: 530-221-3912
 Hours: Monday through Friday, 8:00AM – ~~65:00~~45PM; Saturday and Sunday, 9:00AM – 4:0045PM
 - d. ~~OCCUPATIONAL, ENVIRONMENTAL HEALTH SERVICES, INC~~ **WORK HEALTH SOLUTIONS**
3116 Harrison Ave., Eureka, CA 95503 564 Rio Lindo Ave STE 201, Chico, CA 95926
 Phone: 530-715-8004 ~~707-444-3885~~/ Fax: 707-444-7843
 Hours: Monday through ~~Friday~~ Thursday, 8:00AM – ~~53:00~~45PM ~~by appointment only~~
 - e. **KAISER ON-THE-JOB**
1600 Eureka Rd MOB C 1st FLR, Roseville, CA 95661
 Phone: 916-784-4100
 Hours: Monday through Friday, 8:00AM – 5:30PM; Saturday and Sunday, 8:00AM – 5:00PM
- e.b. **After Business Hours, on Weekends or Holidays:**
NORTHBAY MEDICAL CENTER – EMERGENCY ROOM
 1200 B. Gale Wilson Blvd., Fairfield, CA 94534
 Phone: 707-~~646429~~-50007830

SHASTA REGIONAL MEDICAL CENTER – EMERGENCY ROOM
1100 Butte Street Redding, CA 96001
 Phone: 530-244-5400

- 3.2. Workers' Compensation has a three (3) day waiting period before payment of loss of wages begins. Employees who lose time from work may use their PTO or Paid Sick Leave during the three (3) day waiting period. On the fourth (4th) day of lost time, Workers' Compensation begins paying 2/3 of the employee's lost wage up to the current Workers' Compensation maximum.
- 4.3. Employees may have the option to integrate available CL (Catastrophic Leave), Paid Sick Leave or

Policy/Procedure Number: HR803		Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

PTO with Workers' Compensation for actual days lost due to injury. (Human Resources will coordinate.)

- ~~5.4.~~ Employee will be paid by ~~Partnership PHC~~ for worked hours lost due to doctor's appointment (for the first appointment only) for work-related injuries. ~~Partnership PHC~~ encourages employees to schedule doctor appointments and/or physical therapy appointments the earliest appointment available or the latest appointment available so that there is little disruption during the workday.
- ~~6.5.~~ Employee's time sheet must annotate any time off due to on-the-job injury (i.e., doctor appointments and/or physical therapy).
- ~~7.6.~~ Employee is required to submit physician's certification to Employer for each visit until the employee is fully released to return to work. Under NO CIRCUMSTANCES can an employee return to work without the proper release from the physician.
- ~~8.7.~~ Human Resources
- Complete the "Employee's Claim for Workers' Compensation Benefits" (DWCI) form within 24-hours from DATE EMPLOYER FIRST KNEW OF INJURY.
 - Complete "Employer's Report of Occupational Injury or Illness" form and ~~submit mail~~ all appropriate documents to third party administrator within five (5) working days from "Date Employer First Knew of Injury." If not reported within five (5) days, state penalties may occur.
 - Partnership HealthPlan of California's third party administrator is:
[Bershire Hathaway Homestate Insurance Company](#) ~~ATHENS ADMINISTRATORS~~
 P.O. Box ~~881236696~~, ~~San Francisco~~ ~~Concord~~, CA ~~94188~~94522
 Phone: ~~888-495-8949~~866-308-4446
 Fax: ~~415-675-5485~~877-263-4389

VII. REFERENCES: N/A

II. DISTRIBUTION:

A. PowerDMS

VIII. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

III. REVISION DATES:

07/20/2004, 01/06/2014, 12/02/2014, 09/28/2015, 3/23/2018, ~~08/09/2024~~

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR803			Lead Department: Human Resources	
Policy/Procedure Title: Workers' Compensation			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 10/01/1994		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date:	

I. RELATED POLICIES:

- A. [HR701](#)
- B. [HR703](#)
- C. [HR704](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

- A. [Employee Incident Report](#)
- B. [Supervisor's Report of Employee Incident](#)
- C. [Witness' Report/Statement of Employee Incident](#)

V. PURPOSE:

To provide Directors/Managers with appropriate guidelines regarding Partnership HealthPlan of California's (Partnership) intent to comply with all state and federal regulations pertaining to Workers' Compensation.

VI. POLICY / PROCEDURE:

A. POLICY:

1. Partnership provides a Workers' Compensation Insurance program at no cost to employees. This program covers any injury or illness sustained in the course of employment that requires medical, surgical or hospital treatment. Subject to applicable legal requirements, Workers' Compensation Insurance provides benefits after a short waiting period or, if the employee is hospitalized, immediately upon hospitalization.
2. Employees who sustain work related injuries or illnesses should inform their Director/Manager immediately (if Director/Manager is unavailable, contact Human Resources). No matter how minor an on-the-job injury may appear, it is important that it be reported immediately. This will enable an eligible employee to qualify for coverage as quickly as possible.

B. PROCEDURE:

1. Employees
 - a. Report any work-related injuries or illness to Directors/Managers and Human Resources as soon as possible.
 - b. If any loss time from work occurs, contact Human Resources immediately to discuss Workers' Compensation benefits, etc.

Policy/Procedure Number: HR803		Lead Department: Human Resources	
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Original Date: 10/01/1994		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

2. Director/Manager
 - a. When an employee reports any work-related injury or illness, and is seen by a physician, the following occurs:
 - 1) Report injury/illness immediately to Human Resources.
 - 2) Complete the "Incident Investigation Report" (Attachment A).
 3. If employee needs treatment, he or she will be sent to a provider within the Medical Provider Network (MPN) unless employee has designated their personal physician PRIOR to their injury. Medical Provider Network (MPN): Phone: 888-495-8949 Provider Search: <https://bhhc.com/workers-compensation/medical-networks/>

- a. Partnership Medical Provider Network Treatment Locations:

NORTHBAY OCCUPATIONAL HEALTH

2470 Hilborn Rd., Suite 100, Fairfield, CA 94533

Phone: 707-646-4600/ Fax: 707-646-4601

Hours: Monday through Friday, 7:30AM – 5:00PM

KAISER ON-THE-JOB

3975 Old Redwood Hwy MOB 5 STE 152 Santa Rosa, CA 95403

Phone: 707-566-5555

Hours: Monday through Friday 8:30AM – 5:00PM

PULSE URGENT CARE

100 E Cypress Ave, Redding, CA 96002

Phone: 530-722-1111

Hours: Monday through Friday, 8:00AM – 6:00PM; Saturday and Sunday, 9:00AM – 4:00PM

WORK HEALTH SOLUTIONS

564 Rio Lindo Ave STE 201, Chico, CA 95926

Phone: 530-715-8004

Hours: Monday through Friday 8:00AM – 5:00PM

KAISER ON-THE-JOB

1600 Eureka Rd MOB C 1st FLR, Roseville, CA 95661

Phone: 916-784-4100

Hours: Monday through Friday, 8:00AM – 5:30PM; Saturday and Sunday, 8:00AM – 5:00PM

- b. After Business Hours, on Weekends or Holidays:

NORTHBAY MEDICAL CENTER – EMERGENCY ROOM

1200 B. Gale Wilson Blvd., Fairfield, CA 94534

Phone: 707-646-5000

SHASTA REGIONAL MEDICAL CENTER – EMERGENCY ROOM

1100 Butte Street Redding, CA 96001

Phone: 530-244-5400

4. Workers' Compensation has a three (3) day waiting period before payment of loss of wages begins. Employees who lose time from work may use their PTO or Paid Sick Leave during the three (3) day

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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

waiting period. On the fourth (4th) day of lost time, Workers' Compensation begins paying 2/3 of the employee's lost wage up to the current Workers' Compensation maximum.

5. Employees may have the option to integrate available CL (Catastrophic Leave), Paid Sick Leave or PTO with Workers' Compensation for actual days lost due to injury. (Human Resources will coordinate.)
6. Employees will be paid by Partnership for worked hours lost due to doctor's appointment (for the first appointment only) for work-related injuries. Partnership encourages employees to schedule doctor appointments and/or physical therapy appointments the earliest appointment available or the latest appointment available so that there is little disruption during the workday.
7. Employee's time sheet must annotate any time off due to on-the-job injury (i.e., doctor appointments and/or physical therapy).
8. Employee is required to submit physician's certification to Employer for each visit until the employee is fully released to return to work. Under NO CIRCUMSTANCES can an employee return to work without the proper release from the physician.
9. Human Resources
 - a. Complete the "Employee's Claim for Workers' Compensation Benefits" (DWCI) form within 24-hours from DATE EMPLOYER FIRST KNEW OF INJURY.
 - b. Complete "Employer's Report of Occupational Injury or Illness" form and submit all appropriate documents to third party administrator within five (5) working days from "Date Employer First Knew of Injury." If not reported within five (5) days, state penalties may occur.
 - c. Partnership HealthPlan of California's third party administrator is:

Bershire Hathaway Homestate Insurance Company
 P.O. Box 881236, San Francisco, CA 94188
 Phone: 888-495-8949
 Fax: 415-675-5485

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

07/20/2004, 01/06/2014, 12/02/2014, 09/28/2015, 3/23/2018, 08/09/2024

PREVIOUSLY APPLIED TO: N/A

**PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE**

Policy/Procedure Number: HR210			Lead Department: Human Resources	
Policy/Procedure Title: Working Out-of-Job Class			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/08/2004		Next Review Date: 01/01/2024 Last Review Date: 01/01/2023		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Liz Gibboney			Approval Date: 03/23/2018	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
A. Human Resources

III. DEFINITIONS: N/A

IV. ATTACHMENTS: N/A

V. PURPOSE:
To provide guidelines to Partnership HealthPlan of California (PHC) when requesting a Working Out-of-Job Class assignment for an employee who would assume full responsibility of another job description for an extended period of time.

VI. POLICY / PROCEDURE:
Working Out-of-Job Class – employees may be compensated for performing the duties of another position which is vacant in a higher job classification.

A. Below are the appropriate procedures for requesting a working out-of-class assignment:

1. The request for a working out-of-job class assignment shall be submitted on a PAF to the CEO and the Senior Director of Administration for approval;
2. The PAF must be filled out in advance and specify the beginning and ending date of the working out-of-job class assignment;
3. The employee who is being considered for the working out-of-class assignment should meet all the qualifications of the vacant position;
4. The duties of the employee working out-of-job class shall be specifically allocated to the requesting department and will require the duties be performed for a period of not less than 120 days;
5. Working out-of- job class assignments will be viewed as a way to encourage growth and reward individuals for taking on greater responsibility;
6. Any employee who qualifies and agrees to take on a working out-of-job class assignment will be compensated through a spot bonus, dollar amount based on CEO's approval;
7. Working out-of-job class assignments will be approved on a case by case basis to improve the operation and efficiency of PHC.

B. PHC reserves the right to rescind a working out-of-class assignment at any given time due to the inability of the employee in the working out-of-class assignment to function at a higher level. The working out-of-class assignment shall not be considered a promotion.

Policy/Procedure Number: HR210		Lead Department: Human Resources	
Policy/Procedure Title: Working Out-of-Job Class		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 03/08/2004		Next Review Date: 01/01/2024 Last Review Date: 01/01/2023	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES:

07/27/2007, 01/28/2009, 03/07/2013, 3/23/2018

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR404			Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 11/28/2024 Last Review Date: 11/28/2023		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 11/28/2023	

I. RELATED POLICIES:

- A. [HR206](#)
- B. [HR406](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. Direct Supervisor: Supervisor or above who is directly overseeing the employee's performance.
- B. Direct Supervisor's Manager: Manager or above who directly oversees the Direct Supervisor's performance.

IV. ATTACHMENTS:

- A. [Performance Appraisal Merit Guidelines](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) believes that employees should receive regular formal performance reviews. A performance review is designed to be an objective, consistent, and fair way to gauge on-the-job duties, responsibilities, job performance, and contributions to Partnership. The performance review will also provide a basis for determining possible merit pay increases (should funds be available), and to assist management in making other decisions, such as remediation or training, promotions, transfers, or dismissals.

This policy will provide guidelines to review, appraise, and improve the employee's job performance and conduct, and to communicate goals and expectations for future job performance reviews. The policy will also provide expectations for employees on the performance review process.

VI. POLICY / PROCEDURE:

Partnership normally conducts performance reviews at the following intervals: Introductory Reviews and Annual Reviews. Reviews are documented and stored on Partnership's performance management system, WingSpan. Partnership evaluates performance at all review intervals using Partnership's identified core competencies and the employee's essential functions.

A. Introductory Reviews/90-Day Reviews

Employees who are new to the organization, or who have received a promotion or transfer, will receive an introductory review approximately ninety (90) days into their new position.

Policy/Procedure Number: HR404		Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 11/28/2024 Last Review Date: 11/28/2023	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

1. The Direct Supervisor will review and discuss the job description and expectations during the introductory review.
2. If the employee's performance is determined unacceptable or unsatisfactory, then the employee's introductory period may be extended, or the employee may be terminated.
3. Below is the Introductory Review workflow through WingSpan:
 - 1) Direct Supervisor writes appraisal
 - 2) Direct Supervisor's Manager reviews appraisal
 - 3) HR reviews appraisal
 - 4) Direct Supervisor schedules meeting with employee to discuss final appraisal

B. Annual Reviews/Focal Reviews

Partnership conducts performance reviews annually on August 1.

1. Regular full-time and part-time employees who have been in their position longer than ninety (90) days are eligible to participate in the annual review process.
2. Employees who have been employed in their position less than ninety (90) days will participate in the annual review process in the following year.
3. All employees who have not participated in a recent annual review process will receive a pro-rated evaluation based on their position start date.

C. Employees' overall performance score will determine their merit pay increase per the Performance Appraisal Merit Guidelines document. Additional increases must be submitted by the Department Director with final approval from the appropriate entities: Sr. Director of HR, CEO, and COO (when applicable)

D. Below is the Annual Review workflow through WingSpan:

1. Additional reviewer input by leadership (as applicable)
2. Employee writes self-appraisal
3. Direct Supervisor writes appraisal
4. Next-level management reviews appraisal (as applicable)
5. HR reviews appraisal
6. Direct Supervisor schedules meeting with employee to discuss final appraisal

E. Appraisal Forms

1. Annual appraisal forms include:
 - a. Individual Contributor appraisal form
 - i. Employees in a non-supervisory role
 - b. Management Staff appraisal form
 - i. Employees in a supervisory role, to exclude those identified in the Leadership Executive role
 - c. Leadership Executive appraisal form
 - i. Employees who are in a Department Head or Executive role
2. The Core Competencies framework is:
 - a. Designed to ensure that an individual is utilizing or developing the behaviors necessary to perform their job effectively
 - b. Used to support employee appraisals, development, recruitment, and selection
 - c. Used for monitoring and influencing performance as part of ongoing performance management and development.
3. The four competencies that have been identified are: Innovation; Team Work and Collaboration; Accountability; and Brand Ambassador. Within each competency, several characteristics have been

Policy/Procedure Number: HR404		Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

identified.

4. Essential Functions are established performance standards from the written job description, knowledge of employee's current job, promptness in completing assignments, cooperation, initiative, reliability, acceptance of responsibility, and other pertinent factors.
 - a. Individual Contributor appraisal form
 - i. The Essential Functions area is made up of Job Specific Responsibilities (JSRs) determined by the employee's Direct Supervisor.
 - b. Management Staff appraisal form
 - i. The Essential Functions area is made up of Supervision/Management of Team, Program/Process Oversight, and JSRs determined by the employee's Direct Supervisor.
 - c. Leadership Executive appraisal form
 - i. The Essential Functions area is made up of Management of Team, Departmental Operations, and Strategic Planning.
 5. Goal Support will be added to Individual Contributor appraisal forms to capture contributions or other support to the department or organization-wide goals.
 6. Development Comments section: To notate areas to improve on, upcoming projects, trainings to take/and or consider, and long-term goals or career planning.
 7. Final Evaluation Comments section: To provide overall summary of the review year.
- F. Performance reviews are completed at the following intervals:
1. Introductory Period – Reviews first ninety (90) days of employment in the new position. Launches after sixty (60) days from position start date.
 2. Annual Review – Reviews performance from August 1 – July 31. Launch period is from August 1 through October 1.
 - a. Employees who promoted or transferred into a new role will be evaluated during the normal annual review period. The employee's previous supervisor will be required to complete an appraisal at the time of the promotion/transfer date (unless promotion/transfer date is within 90 days of August 1). The new supervisor score will be used to calculate final merit for the entire review period of August 1 – July 31. New supervisors should consider the previous supervisors feedback in their final rating.
- G. Appraisal Timeliness
1. It is imperative for appraisals to be completed on time for all involved.
 - a. Employees who complete their self-appraisal by their due dates will receive 100% of their approved merit.
 - b. Employees who do not complete their self-appraisal tasks by their due dates will be subject to the following:
 - 1) Self-Appraisal forward to their Direct Supervisor "as is" at the time of forward.
 - 2) A .5% decrease from their approved merit score. For example, if an employee is approved for a 3.0% increase, it will be reduced to a 2.5% merit increase.
 - c. Supervisors who are past due on completing their appraisal tasks for their employees will be evaluated on their appraisal for that performance evaluation period.
 - d. If any employee has a task that is more than sixty (60) days past due, 100% of any approved merit may be forfeited for that performance evaluation period. Employee may also receive a corrective action.
 - e. Exceptions to these rules may be made by the CEO or Sr. Director of HR for extenuating circumstances.

Policy/Procedure Number: HR404		Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 11/01/1993		Next Review Date: 11/28/2024 Last Review Date: 11/28/2023	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

H. For an employee whose job performance is unacceptable, Directors/Managers should consult with HR to process the performance management/discipline procedure.

I. Leaves of Absence

1. The employee's review date will remain the same during a leave of absence, regardless of the amount of time on leave. The employee appraisal will be launched upon return and will follow the standard workflow noted in section D with the same allotted time for each appraisal step.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Sr. Director of HR, Directors, Managers, Supervisors

X. REVISION DATES:

06/01/1998, 03/16/2007, 01/20/2009, 03/18/2013, 04/22/2015, 07/21/2015, 03/01/2019, 02/02/2022, 11/16/2022, 06/01/2023, 11/07/2023

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR407			Lead Department: Human Resources	
Policy/Procedure Title: Suspected Abuse or Neglect of Members			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/21/2016		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input checked="" type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 08/05/2024	

I. RELATED POLICIES:

- A. [CMP-07](#)
- B. [CMP-09](#)
- C. [CMP-10](#)
- D. [CMP-21](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. N/A

IV. ATTACHMENTS:

- A. [Mandatory Reporting for Partnership Professionals Acknowledgement Form](#)

V. PURPOSE:

The following policy will provide guidelines for all Partnership staff who suspect abuse or neglect of members, and summarizes the mandatory requirements that pertain to licensed health care professional staff.

VI. POLICY / PROCEDURE:

- A. Partnership HealthPlan of California (Partnership) compliance standards apply to all staff, including licensed health care professionals. These are described in policies CMP-7, CMP-9, CMP-10, and CMP-21, among others.
- B. Mandatory Reporting within scope of Partnership employment
 - 1. Certain licensed health care staff, including nurses, physicians, psychologists, and social workers have a legal responsibility to report certain suspected activities to law enforcement authorities for investigation. This includes:
 - a. Suspected child neglect or abuse (CA Penal Code Section 11164-11174.3)
 - b. Elder neglect or abuse (CA Welfare and Institutions Code 15630-15632)
 - 2. Human Resources will remind new employees who are licensed health care professionals of their mandatory responsibility to report, distribute a copy of this policy and retain a copy of the signed acknowledgment in their personnel file.
 - 3. A Partnership employed licensed nurse, psychologist, physician, or social worker, or other licensed health care professional who contacts a patient directly, may, in the course of these activities, become aware of a condition carrying a mandatory reporting requirement. This is distinguished from hearing about activity indirectly, not involved in direct patient contact (through third parties, mass

Policy/Procedure Number: HR407		Lead Department: Human Resources	
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Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- media, social media, and medical record review for by review of claims or quality activity).
4. In all cases where a licensed health professional employed by Partnership becomes aware (in the course of their employment activities at Partnership) of any activity that would require mandatory reporting to an outside agency, the case should, at the least, be reported to and discussed with their department director, and potentially escalated to the Chief Health Services Officer or the Chief Medical Officer for consultation and review.
 - a. The Department Director may submit a report of the activity to the required agencies (as permitted by the statute above) and/or
 - b. The employed licensed professional may submit the report as an individual professional.
 5. This policy does not apply to situations that occur outside those involving the professional's role within their Partnership employment. In those cases, the individual should exercise their independent clinical judgment.
- C. Mandatory Reporting Requirements outside scope of Partnership employment
1. Although Mandatory Reporting requirements exist for other conditions, the legal requirements of these would generally limit reporting requirements to health care professionals involved with direct patient care, and thus not apply as a legal requirement to Partnership staff. These include:
 - a. Domestic partner abuse (requires physical exam evidence by reporter) (CA Penal Code Section 11160-11163.6)
 2. Threat to self or others (CA Welfare and Institutions Code 5150 and Civil code 43.92). Nonetheless, if a health care professional at Partnership suspects any of the above conditions, they should report this to their department director for advice. In addition, physicians have a responsibility to report to public health authorities certain conditions: illness due to pesticide exposure, many reportable infectious diseases, lead poisoning, birth and death certificate data, etc. In general, this applies to the health care professional treating the patient, so would not apply to Partnership Medical Directors. For details on the many reporting requirements of physicians involved in direct patient care, see the California Medical Association's Medical Legal Library.
 3. Partnership Medical Directors are encouraged to remind treating clinicians of mandatory reporting responsibilities, if relevant to the circumstance.
- D. Danger of Member
1. If any Partnership employee becomes aware, in the course of their employment at Partnership, of a situation that they believe places a member in danger, they should consult their department director for advice.
 2. Potential responses, depending on the activity, that may be required by Partnership:
 - a. Emergency law enforcement activity (may include "health and safety checks").
 - b. Emergency contact of a local County Crisis Unit (part of specialty mental health in some counties).
 - c. Referral to CMO for emergency quality or credentialing action or emergency notification of a hospital chief of medical staff, supervising medical director, or the Medical Board of California.
 - d. Referral of the case as a "Potential Quality Issue" (PQI) to the regional peer review nurse (see policy for the referral form) for investigation of potential quality of care issues.
 - e. Consultation with Partnership legal consultants.
 - f. Discussion of situation by senior Partnership leaders.
 3. Emergencies: If the employee judges that emergency action (within minutes) is required for the safety of the member, that employee should first call 911 or take the appropriate emergency action, and then contact their supervisor and department director immediately afterwards to make them aware of this emergency activity. The Senior Director of Health Services and CMO (or their designee if out of mobile phone range), are available at all times to discuss emergencies involving member safety.

Policy/Procedure Number: HR407		Lead Department: Human Resources	
Policy/Procedure Title: Suspected Abuse or Neglect of Members		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 09/21/2016		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Directors, Managers, Supervisors, Human Resources

X. REVISION DATES:

3/23/2018

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR508			Lead Department: Human Resources	
Policy/Procedure Title: Compensation			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input checked="" type="checkbox"/> DEPARTMENT
Approving Entities:	<input checked="" type="checkbox"/> BOARD		<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE
	<input checked="" type="checkbox"/> CEO	<input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 08/08/2024	

I. RELATED POLICIES:

- A. [HR213](#)
- B. [HR404](#)

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. Market: The salary that is determined (based on market conditions) by looking at similar positions within the same industry and geographical location. Market 50th may not align with the Wage & Grade table midpoint but will always be within range of the grade.

IV. ATTACHMENTS:

- A. [Scenarios](#)
- B. [Promotion/Equity Request Form](#)
- C. [Career Laddering](#)

V. PURPOSE:

To provide guidelines on the procedure to follow when determining salaries for new hires, promotions, and demotions, and the organization's wage and grade salary structure. Human Resources (HR) is responsible for the development, administration, and maintenance of the Partnership HealthPlan of California (PHC) compensation program. These responsibilities include assignment of proposed new jobs to salary grades, reassignment of existing jobs to salary grades, preparation and maintenance of job descriptions, review and approval of pay adjustments, maintenance, and updates to pay structures.

VI. POLICY / PROCEDURE:

A. Executive Compensation

The Chief Executive Officer's (CEO) compensation will be established by the Board of Directors.

B. Salary Structure Adjustment

1. The salary structure should be reviewed on a regular basis to continue to reflect market competitiveness. The salary structure updates are designed to relieve any upward pressure on range minimums, midpoints, and maximums that may impede the ability to attract, motivate, and retain the workforce. Wage and Grade table adjustments will be applied to the salary schedule annually, using the Bureau of Labor Statistic Wage Index. In the event of a wage index decrease, salaries and grade

Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024	
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees

- ranges will not typically decrease, but final determination will be at the discretion of the CEO.
2. Staff compensation will be reviewed periodically by the CEO with the Senior Director of Human Resources' guidance using external market data analysis. All employees should have a pay rate equal to or greater than the pay grade minimum and may be paid anywhere within the range of the grade. All positions are assigned a pay grade and approved by the CEO with recommendations from the Senior Director of Human Resources. A position must fit within a current pay grade, as no new pay grades will be created. The following factors are considered with position classification: the job's scope against other jobs in the same discipline, available market data, appropriate title identification, exemption status, and pay rate.
 3. If applicable, approved adjustments to salaries are applied in the following order:
 1. Equity adjustments to minimum of grade
 2. Focal Review Merit award
 3. Promotion award
 4. Any applicable non-standard increase

Adjustments can be requested at any time but are not discussed with the employee until all approvals have been received and notification has been provided from HR.

C. Initial Wage

1. A new employee's initial pay should be set in consideration of the candidate's qualifications as defined by knowledge, skills, efforts, responsibilities, training, education, abilities, the pay of other similarly employed individuals, the pay and pay scales of supervised employees, and possible external market factors.
2. The initial wage should be set between the minimum and midpoint of the salary grade based on experience, training, skills, and responsibilities. Beginning salaries for new employees should not be set at a rate greater than the salaries of existing employees with equivalent qualifications and experience within the same job title. Should a salary range change or a grade change of the position occur, any non-standard increases should be considered at the normal performance review date. Any exceptions to this policy must be reviewed and approved by the Senior Director of Human Resources and CEO.

D. Promotion

1. A promotion occurs when an employee changes positions and experiences a change to a higher salary grade with more responsibilities. Staff that promote one or more grades are generally eligible for a promotion increase to the minimum of the new grade, or up to an amount that represents current market conditions as well as the considerations listed in item 2 below. Promotions can occur at any time but are not announced until all approvals have been received and notification has been provided from HR.
2. All increases will be determined by HR using the following as considerations for review: skills, experience, education, training, current salary, internal equity, and external market factors.
3. If the current salary of the promoted employee is higher than the midpoint of the new grade and greater than 10% above market 50th, additional CEO review and approval is required.
4. If an employee is promoted and received an increase, and later returns to the lower grade, their salary will be assessed at the time of the change and could result in a decrease.
5. Should a salary range change or a grade change of the position occur, any non-standard increases will be considered at the normal performance review date.
6. Non-standard increases will be considered by the CEO as recommended by the Senior Director of Human Resources. Requests must be made using the Promotion/Equity Justification Request form.

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E. Transfer

1. A transfer occurs when an employee transfers to another position in the same salary grade as the position previously occupied. In such cases, the employee is usually not eligible for a pay increase at the time of such transfer.

F. Demotion

1. A demotion occurs when an employee is transferred to a position in lower grade due to reorganization or performance issues. A demotion also occurs when an employee voluntarily accepts a position in a lower grade than the position occupied. An employee's salary will be assessed and if the grade and job responsibilities are changed significantly, a salary adjustment may be necessary. If the determined salary is greater than 10% above market 50th, CEO review and approval will be required.

G. Minimum Grade Adjustment

1. An equity adjustment of base pay may be made to ensure employees are paid at least equal to the pay grade minimum. If an equity adjustment is made to employees below the minimum of the grade, the adjustment will be effective at the time of the new Wage and Grade Table effective date. Minimum grade adjustments will be made to the base pay before any merit pay is awarded.

H. Lump Sum Merit Payout

1. The Lump Sum Merit Payout (LSMP) is for those employees who meet or exceed the maximum range of the pay grade. Should the budget allow, and when eligibility requirements have been met, employees may receive an LSMP in lieu of salary increase.
2. Staff are eligible for LSMP when the following requirements are met:
 - a. Current compensation has reached the maximum of the range for the pay grade and employee has received a merit increase as a result of their performance evaluation.
 - b. For employees at the maximum of the pay grade, he/she may be eligible to receive merit pay or a percentage thereof in a lump sum twelve (12) months after the performance evaluation due date. The LSMP will be based on the prevailing rate of pay at the time of payout and the evaluation score received in the prior year.
 - c. For employees whose merit increase results in exceeding his/her pay grade maximum, the employee will receive a partial increase to reach the maximum of the grade. The remaining percent of the merit increase will be paid in lump sum payment twelve (12) months after the performance evaluation due date. (See Scenario attachment.)
 - d. If an employee's salary is below the maximum pay grade times the proposed merit, the employee will be eligible for the difference between the two amounts. (See Scenario attachment.)
 - e. If an employee's current salary exceeds the maximum of their grade times the proposed merit, the employee is not eligible for an LSMP. (See Scenario attachment.)
 - f. If an employee previously eligible for LSMP receives a promotion in the middle of their review period, they will receive a prorated LSMP. Payout for the LSMP will occur with the annual review process.
 - g. If an employee separates from PHC prior to LSMP payout date, no LSMP will be paid.
 - h. All LSMPs will be taxed at the current applicable federal and state rates.

VII. REFERENCES:

- A. N/A

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VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Supervisors, Managers, Directors

X. REVISION DATES:

08/17/2005, 03/17/2009, 09/26/2013, 01/24/2019, 03/25/2019, 06/13/2019, 10/17/2019, 06/01/2020, 07/21/2021, 02/02/2023

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR515			Lead Department: Human Resources	
Policy/Procedure Title: Relocation & Moving Expenses			<input type="checkbox"/> External Policy <input checked="" type="checkbox"/> Internal Policy	
Original Date: 06/01/2015		Next Review Date: 08/05/2025 Last Review Date: 08/05/2024		
Applies to:	<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Healthy Kids	<input checked="" type="checkbox"/> Employees	
Reviewing Entities:	<input type="checkbox"/> IQI	<input type="checkbox"/> P & T	<input type="checkbox"/> QUAC	
	<input type="checkbox"/> OPERATIONS	<input type="checkbox"/> EXECUTIVE	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> DEPARTMENT
Approving Entities:	<input type="checkbox"/> BOARD	<input type="checkbox"/> COMPLIANCE	<input type="checkbox"/> FINANCE	<input type="checkbox"/> PAC
	<input checked="" type="checkbox"/> CEO <input type="checkbox"/> COO	<input type="checkbox"/> CREDENTIALING	<input type="checkbox"/> DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 08/05/2024	

I. RELATED POLICIES:

A. N/A

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

- A. Home Residence: A house, apartment, condominium, houseboat, house trailer, or similar. It does not include other homes owned or kept up by employee or members of employee's family. It also does not include a seasonal home, such as a summer beach cottage.
- B. Household Member: Anyone who has both employee's former and new address as his or her home.
- C. Personal Effects: Includes but is not limited to movable personal property that the taxpayer owns and frequently uses.

IV. ATTACHMENTS:

A. N/A

V. PURPOSE:

The purpose of this policy is to establish guidelines for payment and/or reimbursement of relocation and moving expenses incurred by existing and potential Partnership employees as a recruiting and retention incentive.

VI. POLICY / PROCEDURE:

Partnership aims to recruit and retain the best qualified candidates. Partnership will reimburse certain relocation expenses when candidates must move their residence to work at Partnership. This includes employees transferring from one office to another provided they meet all of the eligibility requirements.

A. Eligibility Criteria

1. Employee's new main job location must be at least 50 miles farther than their former residence was to their old main job location.
2. Employee's old residence must be at least 50 miles from employee's new main job location.
3. Relocation agreement, including the maximum allowance, must be negotiated prior to employment, approved by CEO or designee, and must be included in the offer letter of employment.
4. Employee must sign an agreement prior to receiving any relocation benefits.
5. Reimbursable moving expenses must be incurred within 1 year from the employee's date of hire, unless the employee can prove that circumstances existed preventing the move within that time. (i.e. Employee delayed the move for 18 months to allow their child to complete high school.)

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6. Employee must have or will work full time as an employee for at least 39 weeks in the first 12 months after moving expenses are incurred.
- B. Reimbursable expenses
1. Reimbursable expenses must be reasonable, related directly to the relocation, and will only be reimbursed for the employee and members of the employee's household who will move from the former home to the new home.
 2. House hunting trips are considered discretionary and the CEO will determine if it is in PHC's best interest to reimburse travel expenses for one round trip for employee and spouse to locate housing once an offer has been accepted. The purpose of the house hunting trip is to reduce the overall costs to Partnership for the relocation.
 3. Mileage associated with travel by car from a former home to a new home is considered a reasonable expense and can be reimbursed at the current IRS rate or actual expenses for gas and oil if records are kept, but not both mileage and gas.
 4. General repairs, maintenance, insurance, or depreciation of a personal vehicle are not considered reasonable expenses.
 5. Travel expenses including cost of transportation and lodging for employee and members of employee's household while traveling from the former home to the new home, including expenses for the day of arrival, based on the shortest and most direct route available by conventional transportation can be reimbursed.
 6. The cost of only one trip to a new home is considered a reasonable expense.
 7. Meals in transit are not reimbursable.
 8. Additional expenses for side trips during or stopovers for personal reasons cannot be considered as a reasonable expense.
 9. Parking fees and tolls are reimbursable.
 10. The costs of packing, crating, and transporting employee's household goods and personal effects and those of the members of employee's household from the former home to the new home can be reimbursed.
 11. Storage of household goods and personal effects within any period of 30 consecutive days after the day employee's things are moved from the former home and before they are delivered to the new home can be reimbursed.
 12. Cost of shipping a car or household pets to a new home from a former home can be reimbursed.
 13. Cost of connecting or disconnecting utilities caused by a move of household goods, appliances, or personal effects can be reimbursed.
- C. Position Criteria
1. Officers may be eligible for reimbursement for all reasonable and customary expenses for the moving of household goods; reimbursement for reasonable personal expenses related to the move of the family; and reimbursement for reasonable expenses for one trip to search for housing.
 2. Senior Directors and Directors are eligible for reimbursement for the same expenses as Officers, limited to a maximum total reimbursement of up to \$5,000.00. Other cases will be evaluated as needed and approved by the CEO or designee, when appropriate.
- D. Reimbursement process
1. All reimbursements for relocation expenses must be approved by the Sr. Director of Human Resources and CEO.
 2. All reimbursable expenses must be properly documented with receipts/third party invoices, bills, or statements detailing the expenses.
 3. All reimbursable expenses that do not meet the IRS's definition of "deductible moving expenses" will be included as earned income and subject to Federal, State, and Medicare withholding. The tax burden of these taxes is the responsibility of the employee.
 4. Relocation expense reimbursement is considered a loan, forgivable after the completion of one year

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of employment with Partnership. Otherwise, the reimbursement may be voluntarily deducted by payroll deduction from wages payable at the time of separation from employment, or by other mutually-agreed upon method.

VII. REFERENCES:

A. IRS Publication 521

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Senior Director of Human Resources, CEO

X. REVISION DATES:

03/23/2018

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy Number: 901		Lead Department: Human Resources
Policy Title: Severance Pay		
Original Date: 08/14/03		Revision Date: 02/05/14
Applies to:	<input checked="" type="checkbox"/> Employees	
Approving Entities:	<input checked="" type="checkbox"/> CEO	
Approval Signature:		Approval Date:

I. ATTACHMENTS: NONE

II. PURPOSE:

- A. PHC will provide severance pay to eligible employees whose employment is involuntarily terminated. No severance pay will be granted for separation which is the result of voluntary termination, disability or discharged for cause, unless determined by the CEO to be appropriate in a particular case.

III. POLICY / PROCEDURE:

A. Guidelines

Subject to the following provisions, severance pay may be provided to a full-time exempt or non-exempt employee who is released due to reduction in force, release without fault or involuntarily termination:

- Less than three (3) years of continuous service: 2 weeks;
- Three (3) years, but less than five (5) years continuous service: 3 weeks;
- Five (5) years but less than seven (7) years continuous service: 4 weeks;
- Seven (7) years but less than nine (9) years continuous service: 5 weeks;
- Nine (9) years but less than eleven (11) years of continuous service: 6 weeks;
- One (1) week for each two (2) years thereafter, with maximum at 15 weeks;
- No severance pay will be granted to temporary, introductory period or volunteer employees.

Severance pay approval will be determined by the CEO with insight from the Senior Director of Human Resources. All medical and dental will be terminated the month following termination, i.e. terminated in March, coverage is provided through the end of April. The last 401 and 457 deduction will be reflected on the employee's final paycheck. Information on continuing medical insurance through COBRA will be given to the employee his/her last day of work through the US Postal Service.

B. Severance Pay Discretionary

PHC reserves the right to amend, reduce, modify or discontinue all or part of severance pay with or without reason. This policy is not to be taken as a contract of employment between PHC and any person and nothing herein this policy requires the payment of severance pay for any reason.

2024 Organization Operational Calendar

Color Key: Company Wide Event; Southern Region Event; Northern Region Event; PHC Holidays; Mandatory Training; Department Week/Month; Meeting/Holiday not recognized by Partnership;

January	February	March
1-Jan New Year's Day	1-Feb Town Hall (Virtual Session)	7-Mar Executive Committee Meeting
2-Jan Employee Handbook	1-Feb Executive Committee Meeting	7-Mar IQI Meeting
2-Jan Partnership Compliance Plan	6-Feb ITUP Annual Conference (thru Feb 7)	12-Mar Operations Committee Meeting
2-Jan Policy HR102 - Conflict of Interest	7-Feb IQI Meeting	14-Mar Executive Committee Meeting
4-Jan Executive Committee Meeting	7-Feb Town Hall (NR)	14-Mar Employee Engagement Survey Launch
9-Jan Operations Committee Meeting	8-Feb Executive Committee Meeting	15-Mar Finance Committee
10-Jan IQI Meeting	13-Feb Operations Committee Meeting	15-Mar QI/AC Meeting
11-Jan Executive Committee Meeting	14-Feb Employee of the Year Event (Southern & Northern Region)	15-Mar HR Steering Committee
15-Jan MLK Holiday	15-Feb Finance Committee	20-Mar Finance Committee
16-Jan Executive Leadership Retreat	15-Feb QI/AC Meeting	21-Mar Executive Committee Meeting
17-Jan Finance Committee	15-Feb HR Steering Committee	26-Mar Office Hours w/ Dr. Moore
17-Jan Strategic Planning Committee	15-Feb Compliance Committee Meeting	28-Mar IT Steering Committee
18-Jan Executive Committee Meeting	15-Feb Executive Committee Meeting	28-Mar Phoenix Executive Steering Committee
18-Jan HR Steering Committee	19-Feb Presidents' Day Holiday	28-Mar Data Quality Governance Council
18-Jan Finance Committee	21-Feb Finance Committee	28-Mar Executive Committee Meeting
18-Jan QI/AC Meeting	22-Feb Executive Committee Meeting	30-Mar Doctors' Day
20-Jan Annual Employee Holiday Party (SR)	22-Feb Board Strategic Planning Retreat	31-Mar Cesar Chavez Day
25-Jan Executive Committee Meeting	28-Feb Board Meeting	
31-Jan Town Hall (SR)	28-Feb IT Steering Committee	
31-Jan IT Steering Committee	28-Feb Phoenix Executive Steering Committee	
31-Jan Phoenix Executive Steering Committee	28-Feb Data Quality Governance Council	
31-Jan Data Quality Governance Council	29-Feb Executive Committee Meeting	
April	May	June
1-Apr Diversity, Inclusion, and Belonging	2-May Executive Committee Meeting	6-Jun Executive Committee Meeting
2-Apr Q2 Town Hall (SR)	6-May Nurses Day (National Nurses Week Mon 5/6 - Sun 5/12)	3-Jun Focal Review Launch
4-Apr Executive Committee Meeting	9-May IQI Meeting	11-Jun Operations Committee Meeting
6-Apr Phoenix Go-Live Conversion Start	9-May Executive Committee Meeting	13-Jun IQI Meeting
9-Apr Operations Committee Meeting	10-May Mental Health Awareness Week (May 10-16)	13-Jun Executive Committee Meeting
11-Apr IQI Meeting	14-May Operations Committee Meeting	19-Jun June/teenth
11-Apr Q2 Town Hall (Virtual)	15-May Finance Committee	19-Jun June/teenth
11-Apr Executive Committee Meeting	16-May Executive Committee Meeting	20-Jun Executive Committee Meeting
16-Apr National Healthcare Decision Day	16-May Compliance Committee Meeting	21-Jun HR Steering Committee
16-Apr Q2 Town Hall (NR)	17-May HR Steering Committee	21-Jun Finance Committee
17-Apr Strategic Planning Committee	17-May Finance Committee	21-Jun QI/AC Meeting
18-Apr Executive Committee Meeting	17-May QI/AC Meeting	26-Jun Board Meeting
19-Apr HR Steering Committee	22-May Employee Recognition Lunch (SR)	27-Jun IT Steering Committee
19-Apr Finance Committee	23-May Executive Committee Meeting	27-Jun Phoenix Executive Steering Committee
19-Apr QI/AC Meeting	27-May Memorial Day Holiday	27-Jun Data Quality Governance Council
24-Apr Administrative Professionals Day	30-May IT Steering Committee	27-Jun Office Hours w/ Dr. Moore
24-Apr Board Strategic Planning Retreat	30-May Phoenix Executive Steering Committee	27-Jun Executive Committee Meeting
25-Apr IT Steering Committee	30-May Data Quality Governance Council	
25-Apr Phoenix Executive Steering Committee	30-May Executive Committee Meeting	
25-Apr Data Quality Governance Council	30-May Employee Recognition Lunch (NR)	
25-Apr Executive Committee Meeting		
26-Apr Board Meeting		
TBD Health Equity Week		
July	August	September
2-Jul Q3 Town Hall (SR)	1-Aug Executive Committee Meeting	1-Sep Healthcare Fraud, Waste, and Abuse
4-Jul Independence Day Holiday	5-Aug Phoenix Go-Live	1-Sep HIPAA Privacy and Security Overview
5-Jul Executive Committee Meeting - Tentative	7-Aug Focal Review Direct Supervisor Write Block Day 1	1-Sep Partnership Code of Conduct
9-Jul Operations Committee Meeting	8-Aug IQI Meeting	2-Sep Labor Day Holiday
10-Jul Focal Review Self-Appraisal Block Day	8-Aug Executive Committee Meeting	5-Sep Executive Committee Meeting
11-Jul IQI Meeting	9-Aug Physician's Advisory Committee Meeting	7-Sep Executive Committee Meeting
11-Jul Q3 Town Hall (Virtual)	12-Aug Focal Review Direct Supervisor Write Block Day 2	10-Sep Operations Committee Meeting
11-Jul Executive Committee Meeting	13-Aug Operations Committee Meeting	10-Sep Summer Celebration (NR)
16-Jul Q3 Town Hall (NR)	15-Aug Executive Team Huddle	11-Sep Leadership Retreat
17-Jul Finance Committee	15-Aug QI Functional Review	12-Sep IQI Meeting
17-Jul Strategic Planning Committee	15-Aug Compliance Committee Meeting	12-Sep Executive Committee Meeting
18-Jul Executive Committee Meeting	15-Aug Executive Committee Meeting	13-Sep Physician's Advisory Committee Meeting
19-Jul HR Steering Committee	16-Aug HR Steering Committee	18-Sep Executive Team Huddle
19-Jul Finance Committee	16-Aug Finance Committee	18-Sep HR Functional Review
19-Jul QI/AC Meeting	16-Aug QI/AC Meeting	18-Sep Finance Committee
25-Jul IT Steering Committee	16-Aug Peer Review Meeting	19-Sep Executive Committee Meeting
25-Jul Phoenix Executive Steering Committee	17-Aug Compliance Committee Meeting	19-Sep HR Steering Committee
25-Jul Data Quality Governance Council	20-Aug Employee Summer Celebration	20-Sep Finance Committee
25-Jul Executive Committee Meeting	21-Aug Executive Team Huddle	20-Sep QI/AC Meeting
	21-Aug Finance Committee	20-Sep Peer Review Meeting
	21-Aug Personnel Committee Meeting	23-Sep Compliance Week
	22-Aug Executive Committee Meeting	25-Sep Executive Team Huddle
	23-Aug Board Meeting	25-Sep Office Hours w/ Dr. Moore
	23-Aug Executive Team Huddle	26-Sep IT Steering Committee
	27-Aug Focal Review Second Level Review Block Day	26-Sep Phoenix Executive Steering Committee
	28-Aug Executive Team Huddle	26-Sep HR Function Review
	28-Aug Board Meeting	26-Sep Data Quality Governance Council
	29-Aug Phoenix Executive Steering Committee	26-Sep Operations Committee Mtg. - Sr. Leaders & Dept. Heads
	29-Aug IT Steering Committee	26-Sep Executive Committee Meeting
	29-Aug Data Quality Governance Council	27-Sep Executive Team Huddle
	29-Aug Operations Committee Mtg. - Sr. Leaders & Dept. Heads	
	29-Aug Executive Committee Meeting	TBD Summer Celebration
	30-Aug Executive Team Huddle	
		TBD Annual Leadership Retreat
October	November	December
1-Oct Cybersecurity Awareness Month	7-Nov IQI Meeting	2-Dec Harassment Prevention: Individual Contributor
1-Oct [Cybersecurity Month] Cyber Security Threats Training	7-Nov Executive Committee Meeting	2-Dec Harassment Prevention: Management (Assigned on Even Years)
1-Oct Q4 Town Hall (SR)	11-Nov Veterans' Day	4-Dec Board Meeting
2-Oct Customer Service Week (thru October 6)	12-Nov Operations Committee Meeting - Managers & Above	5-Dec Executive Committee Meeting
2-Oct Executive Team Huddle	14-Nov Executive Committee Meeting	6-Dec Board Meeting
3-Oct Executive Committee Meeting	14-Nov Fairfield's Pop-Up Shop	7-Dec SR Pictures with Santa
4-Oct Configuration Functional Review	15-Nov Finance Committee	10-Dec Operations Committee Mtg. - Mgrs. & Above
5-Oct Executive Committee Meeting	15-Nov QI/AC Meeting	11-Dec Executive Team Huddle
6-Oct Mental Health Awareness Week	15-Nov HR Steering Committee	11-Dec Finance Functional Review
8-Oct Operations Committee Meeting	15-Nov Peer Review Meeting	12-Dec Executive Committee Meeting
9-Oct Executive Team Huddle	20-Nov Executive Team Huddle	12-Dec IQI Meeting
10-Oct IQI Meeting	20-Nov Finance Committee	18-Dec Office Hours w/ Dr. Moore
10-Oct Q4 Town Hall (Virtual)	20-Nov Staff Appreciation Luncheon (SR)	19-Dec Executive Committee Meeting
10-Oct Executive Committee Meeting	21-Nov Executive Committee Meeting	20-Dec HR Steering Committee
11-Oct Physician's Advisory Committee Meeting	21-Nov Compliance Committee Meeting	20-Dec QI/AC Meeting
15-Oct Q4 Town Hall (NR)	27-Nov Executive Team Huddle	25-Dec Christmas Holiday (observed through Dec. 26)
16-Oct Tribal Health Engagement	28-Nov Thanksgiving Holiday (through 11/29)	26-Dec Executive Committee Meeting
16-Oct Finance Committee	28-Nov IT Steering Committee	26-Dec IT Steering Committee
16-Oct Strategic Planning Committee	28-Nov Phoenix Executive Steering Committee	26-Dec Phoenix Executive Steering Committee
17-Oct Executive Committee Meeting	28-Nov Data Quality Governance Council	26-Dec Data Quality Governance Council
18-Oct Finance Committee	28-Nov Operations Committee Mtg. - Sr. Leaders & Dept. Heads	27-Dec Executive Team Huddle
18-Oct HR Steering Committee	28-Nov Claims Functional Review	TBD Pictures with Santa's (SR) - Tentative
18-Oct IT Functional Review	28-Nov Executive Committee Meeting	TBD Pictures with Santa/Santa's Workshop (NR) - Tentative
18-Oct Peer Review Meeting	29-Nov Executive Team Huddle	TBD Holiday Party (NR) - Tentative
18-Oct QI/AC Meeting	TBD Staff Appreciation Luncheon (Eureka)	
21-Oct HEDIS Week 2024	TBD Staff Appreciation Luncheon (Atecha)	
23-Oct Board Meeting	TBD Staff Appreciation Luncheon (Airport)	
24-Oct Executive Committee Meeting		
25-Oct Board Meeting		
25-Oct CAHP Conference; Palm Desert		
30-Oct Executive Team Huddle		
30-Oct GSA Functional Review		
31-Oct Executive Committee Meeting		
31-Oct Data Quality Governance Council		
31-Oct IT Steering Committee		
31-Oct Operations Cmte. Mtg. - Sr. Leaders & Dept. Heads		
31-Oct Phoenix Executive Steering Committee		
TBD Halloween Festivities (SR) - Tentative		
TBD Halloween Carnival (NR) - Tentative		
TBD Benefits Fair		

Color Key: Company Wide Event; Southern Region Event; Northern Region Event; PHC Holidays; Mandatory Training; Department Week/Month; Meeting/Holiday not recognized by Partnership;

Last update: Fri, August 16, 2024