



<b>Policy and Procedure No: QM 116.2   Revision No:2</b>	
<b>Division: Care Management</b>	
<b>Department: Quality Management</b>	
<b>Title: PHP Managed Care Pulse Performance Evaluation</b>	
<b>Effective Date: 12/21/2018</b>	
<b>Supersedes Policy No: QM 16.0, QM 116.0, QM 116.1</b>	
<b>Reviewed/Revised by: Karen Haughey</b>	<b>Review/Revision Date: 12/10/2025</b>
<b>Approving Committee: Quality Management Committee</b>	<b>Date: 12/11/2025</b>
<b>Executive Oversight Committee Date: 12/16/2025</b>	

### **Purpose:**

The Care Management Pulse Performance Evaluation process provides a means for discussing, planning and reviewing the performance of each employee as it relates to their position and responsibilities.

### **Policy:**

All Care Management staff who have successfully completed the ninety (90) day probationary period of employment will receive a written Pulse Performance evaluation from their manager as an annual occurrence. This evaluation is an internal Care Management process and in addition to evaluation of staff members, may be referred to when evaluating staff for a holiday bonus. The distribution of a holiday bonus is at the sole discretion of Senior Management and is exclusive to this evaluation. This evaluation serves as a mechanism to discuss accountability, performance, and review yearly progress and goals.

### **Procedure:**

1. **Eligibility:** All Care Management full-time staff who have completed their ninety (90) day probationary period with at least nine (9) months of employment in the Care Management division will receive this evaluation.
2. **Performance Review Schedule:** Schedule of review will be based on a calendar year.
3. **Scoring:** The rating guidelines are based on an alphabetical score of A, B, C D distributed per Human Resources.
  - a. A – Highest achievable score and signifies employee excels in their work, volunteers for other assignments, and goes above and beyond in assisting their colleagues with other tasks.
  - b. B – Solid understanding of responsibilities, strong work performance, understands and consistently meets expectations.
  - c. C – Employee is lacking in motivation or skills and may need more experience to fully understand and execute responsibilities. Employees who are rated C require a formal written Performance Improvement Plan.

- d. D - Employee has failed to make reasonable progress to meet job expectations. In addition to the requirement of a written Performance Improvement Plan, a "D-rated employee is not eligible for a bonus.

4. Criteria: Based on the following derived from the Health Plan's ninety (90) day evaluation criteria

- Client Experience
 

*Explain the employee's ability to develop relationships inside and outside their department by listening, understanding, prioritizing and providing solutions to create successful partnerships.*
- Teamwork/Communication
 

*How has the employee been able to work and communicate with co-workers and colleagues from other departments/divisions?*
- Adaptability
 

*How has the employee embraced our mission & goals?*

*How has the employee been able to adapt to the AHF Culture and work environment?*
- Quality
 

*How has the employee demonstrated quality and accountability in the work Performance?*
- Dependability
 

*How has the employee shown a strong work ethic, accountability and reliability in completing assigned tasks and overall punctuality and attendance?*

5. The Chief of Care Management reserves the right to add other criteria as appropriate to this Pulse Session evaluation.

6. Sample (Page 3) of the evaluation referred to as a Care Management "Pulse Session" which is reviewed with the employee by the Director or Manager with an opportunity for comment.

- a. This evaluation will be sent to all Care Management no later than October 15<sup>th</sup> of each year. The Care Management deadline for employee rating is November 5<sup>th</sup>. 
- b. If the evaluation itself is not able to be completed by the 11/5 deadline, Managers will send the rating of each employee to the Chief of Care Management or designee.
- c. The reviewed and signed Pulse Evaluation form must be completed and reviewed with staff members and signed by staff members no later than December 31 of each year and sent to the Chief of Care Management or designee.

## **Monitoring:**

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This Policy and Procedure is reviewed at least annually by the Quality Improvement and Health Equity Committee (QIHEC).

**Reference(s):**

1. Society for Human Resources Management (SHRM)

## 2022 Managed Care Pulse Session

*This Managed Care Pulse Session evaluation is designed to serve as an annual touch base for supervisor and employee. At this meeting the Supervisor will provide feedback on his/her observations of the employee's performance in 2022 based on the measurements listed below. This Pulse session will be included in the determination of 2022 bonus amounts.*

*Please complete for all staff with a hire date of 9/30/2022 or earlier. Employees in their first year of employment will be eligible for a pro-rated bonus amount.*

Employee Name	Date of Hire	Date of Meeting
Job Title	Work Location	Supervisor Name

**Has this staff member received Disciplinary Action in this evaluation year?**

  No

  Yes, if yes provide: Date of Action \_\_\_\_\_

Level of Disciplinary Action \_\_\_\_\_

Type of Violation/Infraction \_\_\_\_\_

Note: Formal Disciplinary Action will impact the determination of the employee's 2022 bonus. Each case will be reviewed on an individual basis. Employees currently on a Final Warning are not eligible for bonus, however this Pulse Session must be completed.

**Rating Guide**

***2022 Rating Criteria are as follows:***

- (A) - Employee goes above and beyond**
- (B) - Employee does what is required of the job**
- (C) - Employee is lacking in Motivation or Skills (however is working to improve)**
- (D) - A score of D will require a Performance Improvement Plan and bonus would not be considered.**

Measure	Rating A B C or D
<b>Client Experience</b> Explain the employee's ability to develop relationships both inside and outside of their department by making the effort to listen, understand, prioritize and provide solutions to create successful partnerships.	
<b>Teamwork/Communication</b> How has the employee been able to work with co-workers and colleagues from other departments?	
<b>Adaptability</b> How has the employee embraced our mission & goals? How has the employee been able to adapt to the AHF Culture and work environment?	
<b>Quality</b> How has the employee demonstrated quality and accountability in their work performance?	
<b>Dependability</b> How has the employee demonstrated strong work ethic, accountability and reliability in regards to completing assigned tasks and overall punctuality and attendance?	
<b>Overall Average letter Score of above measures</b>	

**Supervisor / Employee Dialogue**

These suggestions may work to encourage/initiate a dialogue with your staff.

- ✓ Do you understand the mission of the organization? Of Managed Care?
- ✓ How do you see your position impacting patients and the Managed Care Division?
- ✓ What tools can leadership provide (I.E: training, processes, policies) to better assist you?

Employee remarks (optional)

Supervisor remarks (optional)

**Next Follow Up**

minimum 325 days

**Acknowledgements**

*Signature is simply an acknowledgement that this meeting has taken place.*

*Supervisor's Signature/Date*

*Employee's Signature / Date*

*Please send signed/dated/completed form to VP Managed Care [Karen.Haughey@ahf.org](mailto:Karen.Haughey@ahf.org) (If you report to Donna, please send to both of us. Please give a copy to your staff member and keep one for your files. This evaluation must be completed no later than 12/31/2023)*

