

Chapter 9 Case Study: Performance Appraisal Evaluation

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The facility where Margie works made significant changes during the past year, especially in technology. The facility launched a new EHR and also an encoder in the HIM department. This technology dramatically changes workflow for everyone. Margie was a long-time employee, working for the same hospital for ten years, and she has been coding for twenty-five years in total. Most of her career likely utilized paper charts because the EHR recently became mandatory. She was used to fulfilling her duties in a certain way and following the policies and procedures for her current hospital. The EHR and encoder change everything. She needs extensive training just like everyone else, but she missed six weeks due to her husband's health. She probably did not receive adequate training for these new changes with the amount of time she missed from work (Kelly, 2020, p. 196).

Margie also experienced a dramatic change in her working environment. Now, everyone in the HIM department works together in the same area. Their desks are close to each other within cubicles. This concept leads to much noisier surroundings. She was used to a quiet office and may have the personality that needs the quiet to do her work well. Her desk now has dual monitors to use the encoder while viewing charts. She is working with new employees due to staffing changes. Not only is she in a new office space, but she has some new coworkers. More importantly, one of her coworkers received a promotion and is now her manager. Her review could have different results partly because of new management (Kelly, 2020, p. 196).

Margie's new manager made many mistakes during her performance appraisal review. The manager's behavior during the review reflects someone who is new to management and still behaves like an employee. The manager had the wrong attitude about the review. She scheduled

the review on a Friday afternoon, and she was in a hurry and eager to leave for the weekend. She handed Margie the evaluation and told her to ask her if she had any questions. After doing so, the manager considered her job complete. She gave Margie the impression that she would answer her questions but did not because she gave her other duties and even personal activities a higher degree of importance. She even got defensive in response to Margie's questions (Kelly, 2020, p. 197).

The manager was also rude regarding her phone and computer use. She started the review ten minutes late because she took a personal phone call. Her phone was distracting and noisy because she played music on it, and it continued to ring throughout the review. She also had constant notifications and checked her emails instead of giving Margie the time she deserved. The distractions she created with the technology showed her lack of professionalism (Kelly, 2020, p. 197).

The manager was impersonal and unempathetic toward Margie. She was preoccupied with her own duties and personal activities that she was oblivious to Margie's needs and feelings. Her focus and attention were in the wrong place. She was defensive when Margie asked her questions. She put her own needs and desires first. In doing so, Margie did not get answers, and the hospital lost a long-term employee (Kelly, 2020, p. 197).

The overall process for the performance appraisal cycle needs improvement. Margie's manager did a poor job with her year-end evaluation. Margie left the review upset, and ultimately, she decided to leave the hospital and take a new job. If she stayed, she would not know how to improve her performance and perhaps have the same results for the upcoming year (Kelly, 2020, p. 197).

Margie did not receive periodic feedback during the year despite periodic reviews. The hospital could have regular reviews with the employees rather than only at year-end. If Margie had the results of the periodic reviews throughout the year, she would have had a chance to improve her performance earlier instead of being shocked at year-end (Kelly, 2020, p. 197).

Margie also did not get a chance to do a self-assessment or get a 360 performance review from her peers. A self-assessment provides an opportunity for Margie to build her case for her hard work and allows her to communicate to her manager how she thinks she is doing. It also allows the manager to see the discrepancy between how she thinks Margie is doing and how and Margie believes she is doing. The other employees may also have the same issue in believing they are performing better than they realize. Self-assessments and 360 performance reviews might provide a broader picture of actual performance by seeing all employee's points of view (Kelly, 2020, p. 192-93, 197).

References

Kelly, J. R., & Greenstone, P. S. (2020). *Management for the Health Information Professional*. (2nd ed.). Chicago, IL: AHIMA Press.