

Check Your Understanding

1. Discuss three ways performance appraisals are perceived as positive and three ways performance appraisals are perceived as negative.
2. Identify the six performance appraisal methods commonly used by HIM departments and explain the advantages and disadvantages of each.
3. Discuss best practices for performing a self-assessment appraisal.
4. Discuss best practices for giving a performance appraisal review.
5. Identify one reason why an employee might be placed on a performance improvement plan (PIP) and outline the six steps for initiating an employee PIP.

Case Study

Objectives

- Assess the factors that impact a long-term employee's job performance
- Evaluate a performance appraisal review meeting
- Identify methods for improving performance appraisal review outcomes

Instructions

Review the following case study and create a document that provides responses that correlate to the questions in terms of assessing an HIM coder's job performance.

Scenario

Margie has been a coder in the HIM department of a large acute-care facility for the past 10 years and prior to working at this organization, she coded for 15 years at a similarly sized acute-care facility. Throughout her coding tenure, Margie mostly coded outpatient encounters such as outpatient observations, outpatient surgeries, and Emergency Room Department visits. Two years ago, Margie was cross-trained to code inpatient discharges as well. At last year's performance appraisal, Margie received an overall score of 3.8 out of 5, which denotes that she "exceeds job performance expectations." This past performance appraisal cycle, the HIM coding area and Margie personally experienced the following changes:

- The hospital implemented a new EHR that required extensive training for all hospital employees.
- The coding area had some management turnover with the long-term coding manager retiring and the coding lead promoted to the coding manager position.
- The HIM department's coding productivity was updated to include computer-assisted coding and all coders went from using one monitor to dual monitors.
- Margie used to sit in a quiet office area with one other individual but the department was reconfigured and all coders were moved to a central location. The coding office is a large room with each coder occupying a "cubby-type" area with dividers between each desk. The noise in the open concept office tends to magnify even with the dividers.
- Margie's husband had some health issues as well, which caused Margie to be on family medical leave for six weeks.

It is that time of year for all performance appraisal reviews to be conducted and Margie has expectations that her performance evaluation will be similar to last year's. Margie's coding manager set up a time to go over Margie's review, Friday afternoon at 3:00 p.m. in the manager's office. Margie arrives promptly at the manager's office but has to sit outside the office for 10 minutes waiting for the coding manager to finish up a personal phone call. Margie enters the room and the coding manager has music playing from her iPhone and her computer is open with the email notification on. Margie sits down at the chair on the other side of the manager's desk and the coding manager hands Margie the evaluation and says, "review this please and let me know if you have any questions, I have to answer a few emails because it is Friday afternoon."

Margie reviews the evaluation and she is stunned by the final evaluation score that she is receiving this year. Her final score is a 2.8 out of 5 and she is being put on a PIP with no pay raise. There are items included in the evaluation that Margie had no idea had been a problem throughout the year. Margie's productivity and quality were marked below average and the statistics included in the review were ones that Margie had not seen all year. As Margie read the evaluation, the coding manager's phone kept ringing and the manager kept answering her emails. Margie was very upset and tried to address the evaluation with the coding manager, which in turn made the coding manager defensive. The coding manager was not open to discussing any of incidences noted in the evaluation and she stated that she did not have time to review Margie's monthly productivity and quality scores with her. As Margie typically does not like conflict, she signed the evaluation and PIP but she was very upset leaving the room. The coding manager did not seem to notice that Margie was upset and continued answering her emails.

Two months later: Margie accepted another job at a specialty hospital within the same geographic region of her facility and she resigned with a two-week notification.

Assumptions

- All performance appraisal reviews for the organization are performed at the end of the fiscal year.
- The healthcare facility requires periodic reviews of performance throughout the performance cycle but Margie did not receive any periodic feedback throughout the performance cycle.
- Margie did not get a chance to perform a self-evaluation or request 360 performance review from her peers.

Deliverables

1. Discuss two distinct items that might affect Margie's work performance. Explain in detail why you think these might cause Margie's job performance to vary from the previous year.
2. Identify three inappropriate occurrences that happened during the actual performance appraisal review meeting and how this meeting could be improved.
3. Identify three negative performance appraisal events that occurred throughout Margie's performance appraisal cycle and identify preventive methods so the same negative events do not occur next year.

Review Questions

1. Eleanor is a release of information clerk in the HIM department. Once a quarter she meets with her supervisor to review her productivity and progress toward her annual goals. This represents which phase in the performance appraisal life cycle?
 - a. Annual review
 - b. Periodic review
 - c. Planning
 - d. Training