



Personnel Committee Meeting Agenda

August 19, 2026: 9:30 a.m. – 11:00 a.m.

Partnership In-person Locations:

Fairfield Office located at 4665 Business Center Drive, Fairfield, CA 94534, (Shasta, 3rd Floor)

Redding Office located at 2525 Airpark Drive, Redding, CA 96001, (Burney Falls, 1st Floor)

Eureka Office located at 1036 5th Street, Suite E, Eureka, CA 95501, (Sue-Meg, 1st Floor)

Auburn Office located at 281 Nevada Street, Auburn, CA 95603, (Lincoln, 1st Floor)

Plumas District Hospital located at 80 Main Street, Quincy, CA, 95971, (Satellite Office)

Public Participation

Public comment is welcome during designated "Public Comments" time frames or by emailing comments to the Board Clerk at 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	Angela Casillas	
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: CHRO Update	N/A	Naomi Gordon
1.5	INFORMATION: Partnership's 2026 Employee Benefits Handbook <i>This request is for the Personnel Committee to review the benefits offered to PHC employees.</i>	5 - 23	Naomi Gordon
1.6	ACTION: Partnership'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 Partnership employees.</i>	25 - 195	Naomi Gordon

	Group 2: Policies Containing Changes • HR506 – Employee Reimbursement for Employee Growth & Career Development 25-32 • HR507 – Remote Work Program 33 - 48 • HR508 – Compensation 49-56 • HR509 – Bilingual Standards & Compensation 57-60 • HR511 – Attendance & Punctuality 61- 72 • HR512 – Mileage Reimbursement 73-77 • HR515 – Relocation & Moving Expenses 78-83 • HR605 – Management Incentive Program 84-89 • HR608 – Employee Recognition 90-93 • HR610 – Holiday Pay 94-99 • HR611 – Staff Events 100-105 • HR703 – Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave 106-126 • HR710 – Paid Sick Leave 127-132 Group 3: Policies Containing No Changes • HR207 – Referral Awards 133-134 • HR210 – Working Out of Job Class 135-136 • HR212 – Temporary Agency Workers 137-139 • HR215 – Employee Separation and Eligibility for Rehire 140-142 • HR404 – Performance Reviews 143-146 • HR503 – Meals and Rest Periods 147-148 • HR504 – Overtime and Shift Differentials 149-150 • HR514 – Employee Growth & Career Development 151-156 • HR517 – Disaster/Emergency Compensation 157-159 • HR604 – Spot Bonus 160-161 • HR606 – Employee Award Program 162-163 • HR612 – Community Service 164-165 • HR613 – Catering Guidelines 166-167 • HR701 – Paid Time Off (PTO) 168-170 • HR702 – Paid Time Off Cash-Out Program 171-172 • HR706a – 9/80 Workweek (Exempt) 173-176 • HR706b – 9/80 Workweek (Non-Exempt) 178-181 • HR712 – Other Leaves 182-188 • HR803 – Workers’ Compensation 189-192 • HR807 – Cyber Security & Internet Usage 193-194 • HR817 – Employee Social Media 195-197		
1.7	INFORMATION: 2026 Organization Operational Calendar <i>This request is for the Personnel Committee to review the 2026 Event Calendar is available for all Partnership employees.</i>	198	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 Partnership regional offices (see locations above). It can also be found online at www.partnershiphp.org. Partnership 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.

2026 Employee Benefits Handbook

Key Highlights & Details



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Welcome to **Partnership HealthPlan of California!**

This guide provides an overview of coverage choices and enrollment information so employees can build the best benefits package for themselves and their family.

Our Mission Statement

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

Working Together Value Statement

We, the Partnership 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.



Employee Benefits Overview

Partnership HealthPlan of California is committed to providing exceptional benefits to our employees. Keeping in mind the unique and diverse needs of our employees, we have put together a benefits program that will help protect the personal and financial well-being of employees and their family.

All full-time, active employees working a minimum of 30 hours per week are eligible on the first of the month following their date of hire. The benefit plan and dependent elections that employees make when they are hired are effective for the entire plan year, unless they experience a qualifying event (marriage, birth, adoption, or loss of coverage). If employees experience a qualifying event, they must notify Human Resources within 30-days; otherwise, they will be required to wait until the next Open Enrollment to make any changes to their benefit plan elections.

During Partnership's annual Open Enrollment, employees can make changes to their benefit plan elections, such as adding or deleting dependents, and/or changing health plans. Changes made during Open Enrollment will be effective January 1 of the following year.

Eligible Dependents

Employees may cover their dependents under many of the benefit plans if they are one of the following:

- *Spouse or domestic partner.*
- *Biological children, adopted children, stepchildren, and children of a domestic partner up to age 26 regardless of student or marital status.*
- *Disabled child(ren) regardless of age if incapable of self-sustaining employment, and if the disability began before the limiting age.*

Medical Benefits

Partnership is proud to offer medical benefits to all eligible employees through Kaiser Permanente, Blue Shield of California, and Western Health Advantage.

While eligible employees can enroll in the plan of their choosing, some plans may be out of their service area to access healthcare services. Plan service area is determined by employee's primary residence.

Below is a list of our medical plans and the Partnership office locations within their service area to assist in electing the best plan for employees based on their primary residence.

Partnership Office Location	Medical Plans
Fairfield Santa Rosa Auburn	• Blue Shield Preferred Provider Organization (PPO) • Blue Shield Health Savings Account (HSA) • Blue Shield Health Maintenance Organization (HMO) • Kaiser HMO • Kaiser HSA • Western Health Advantage HMO
Redding Eureka Chico	• Blue Shield Preferred Provider Organization (PPO) • Blue Shield Health Savings Account (HSA)

If an employee's primary residence is not near the above listed Partnership office locations, the links below can be used to identify the full list of service areas.

- [Blue Shield](#)
- [Kaiser](#)
- [Western Health Advantage](#)

Kaiser Permanente

In-Network	Kaiser Permanente	
	HSA Deductible HMO	Traditional HMO 20
Individual Deductible	\$2,000	\$0
Family Deductible	\$4,000	\$0
Individual Out of Pocket Maximum	\$3,400	\$1,500
Family Out of Pocket Maximum	\$6,400	\$3,000
Office Visit	\$30*	\$20
Specialist Visit	\$30*	\$35
Preventive Care	\$0	\$0
Chiropractic/Acupuncture	N/A	\$10 (30 combined visits)
Diagnostic Lab/X-Ray	\$10*	\$0
Complex Radiology (CT, MRI, PET)	\$50*	\$0
Inpatient Hospital	\$250/admit*	\$250/admit
Outpatient Surgery	\$150/procedure*	\$100/procedure
Urgent Care	\$30*	\$20
Emergency (waived if admitted)	\$100*	\$100
Rx Generic	\$10*	\$10
Rx Brand Name	\$30*	\$30
Rx Specialty	20% up to \$150*	25% up to \$150
Group Number: Phone Number: Website:	39768 (800) 464-4000 www.kp.org	

*Calendar year deductible applies

Blue Shield of California

In-Network	Blue Shield of California		
	Blue Shield PPO (Custom PPO Deductible 20-500)	Blue Shield HSA (Full PPO Savings 2250/3300/4500)	Blue Shield HMO (Access + HMO 20-250)
Individual Deductible	\$500	\$2,250	\$0
Family Deductible	\$1,000	\$4,500	\$0
Individual Out of Pocket Maximum	\$3,500	\$3,500	\$2,000
Family Out of Pocket Maximum	\$7,000	\$7,000	\$4,000
Office/Specialist Visit	\$20/\$20	20%*/20%*	\$20/\$30
Teladoc	\$0	\$0	\$0
Preventive Care	\$0	\$0	\$0
Chiropractic/Acupuncture*	\$20 (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 Number: Phone Number: Website:	W0053649 (888) 256-3650 www.blueshieldca.com		

*Calendar year deductible applies

Western Health Advantage

In-Network	Western Health Advantage
	Premier 20 HMO
Individual Deductible	\$0
Family Deductible	\$0
Individual Out of Pocket Maximum	\$1,500
Family Out of Pocket Maximum	\$3,000
Office Visit	\$20
Specialist Visit	\$20
Preventive Care	\$0
Chiropractic/Acupuncture	\$15 (20 visits each)
Diagnostic Lab/X-Ray	\$0
Complex Radiology (CT, MRI, PET)	\$0
Inpatient Hospital	\$0
Outpatient Surgery	\$20/visit in office or \$100/visit in facility + facility fee
Urgent Care	\$35
Emergency (waived if admitted)	\$100
Rx Generic	\$10
Rx Brand Name	\$30
Rx Specialty	\$50
Group Number:	107887
Phone Number:	(800) 563-2250
Website:	www.westernhealth.com

Dental Benefits

Partnership 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.

Cypress Exclusive Network	In-Network	Out-of-Network (90th UCR)
Preventive Services (exams, cleanings*, x-rays)	100%	100%
Basic Services (basic fillings, extractions, oral surgery)	90%	80%
Major Services (crowns, inlays, bridges, dentures)	60%	50%
Calendar Year Deductible	\$50 individual/\$150 family	\$50 individual/\$150 family
Calendar Year Maximum Benefit	\$3,500 per member	\$3,500 per member
Lifetime Orthodontic Maximum (adult and child)	50% up to \$1,500	
Group Number: Phone Number: Website:	PHP0116 (855) 844-0626 www.directdentalplans.com	

*Three standard cleanings per calendar year

While employees may see any provider, this plan has access to the Cypress Exclusive Network (CEN), and DenteMax Plus PPO (which includes nationwide, Dental Health Alliance (DHA) and Careington Network providers) (CEN not available in all areas). When employees visit an in-network provider, fees may be up to 35% less than an out-of-network provider. Visit www.directdentalplans.com to find an in-network dentist.

Vision Benefits

Partnership offers its employees and their eligible dependents vision coverage through Vision Service Plan (VSP), which has over 23,000 doctors located in rural and metropolitan areas throughout the nation. Visit www.vsp.com to search 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)	\$220 allowance + 20% discount
Contact Lenses (in lieu of glasses, every 12 months)	\$200 allowance + up to \$60 copay
Group Number: Phone Number: Website:	12251672 (800) 877-7195 www.vsp.com

Employee Share of Cost

2026 Health Care Cost Per Pay Period			
	Employee Only	Employee + 1	Employee + Family
Blue Shield of California HMO (Access+ HMO 20-250)	\$15.64	\$128.25	\$200.82
Blue Shield of California HSA (Full PPO Savings 2250/3000/4500)	\$18.12 Partnership contributes \$366.66 per month	\$135.28 Partnership contributes \$729.16 per month	\$193.04 Partnership contributes \$729.16 per month
Blue Shield of California PPO (Custom PPO Deductible 20/500)	\$15.57	\$127.70	\$199.96
Kaiser Permanente HMO (Traditional HMO 20)	\$12.92	\$103.72	\$175.34
Kaiser Permanente HSA (HSA Deductible HMO)	\$14.04 Partnership contributes \$366.66 per month	\$113.39 Partnership contributes \$729.16 per month	\$160.77 Partnership contributes \$729.16 per month
Western Health Advantage HMO (Premier 20 HMO)	\$13.46	\$104.97	\$162.77
Direct Dental	\$0.00	\$0.00	\$0.00
Vision Service Plan	\$0.00	\$0.00	\$0.00
Waiving Coverage	Medical: Receive \$138.50/pay period with acknowledgment of waive reason completed through ADP self-service. Dental and Vision: Receive \$18.50/pay period with acknowledgment of waive reason completed through ADP self-service (must waive both to receive credit).		

Health Savings Account (HSA)

A Health Savings Account (HSA) is a tax-advantaged savings account available to those enrolled in a high deductible health plan, that can be used to pay for qualified healthcare expenses. The IRS limits how much can be contributed to an HSA account annually, \$4,400 for individual coverage and \$8,750 for family coverage. Partnership will contribute to an employee's HSA with monthly contributions, **\$366.66 for individuals and \$729.16 for families**, which meets the annual IRS maximum amount.

Employees 55 or older may make an additional catch-up contribution of \$1,000. Catch-up contributions must be made directly with HSA Bank. Authorized signers who are 55 or older must have their own HSA to make the catch-up contribution.

HSA Eligibility

To enroll in a HSA, employees must be enrolled in a high-deductible health plan, and must not be covered by any other non-HSA compatible plan such as Medicare Parts A and B, be covered by TriCare, or be claimed as a dependent on anyone other than their spouses' tax return.

MissionSquare Retirement

Partnership provides a retirement plan for eligible employees administered by MissionSquare Retirement. The plan has two accounts Deferred Compensation 457 Plan and Money Purchase 401(A) Plan. For both accounts, participants can elect to invest the contributions in an array of mutual fund options. Contributions and earnings are not taxed until funds are withdrawn, generally upon retirement. Employees are auto enrolled at plan default investment and contribution options as noted above, but may make changes at any time by creating an online account at www.msqplanservices.org/myplan/303962.

Action or Condition	Deferred Compensation 457 Plan	Money Purchase 401(A) Plan
Participation	Auto enrolled at default Employer 1% contribution. Employee contribution is voluntary	Auto enrolled at appropriate contribution rate listed below. Employee contribution is mandatory
Eligibility	Immediately	Immediately
Contributions/Match	Employee can contribute up to 75% of salary. Partnership will match dollar-for-dollar up to 6% of salary.	Employee/Employer; Employee: 6.2% /Partnership 6.2% Sr. Director: 7.2% /Partnership 6.2% Executive: 9.2% /Partnership 6.2%
Rollovers	Can be rolled over to other qualified plans and conduit IRA's.*	Can be rolled over to other qualified plans and conduit IRA's.*

Portability	May be transferred to another qualified plan, if plan accepts transfers, or cash out (taxable as ordinary income in year received).	May be transferred to another qualified plan, if plan accepts transfers, or cash out (taxable as ordinary income in year received).
Annual Limit (Employee & Employer)	Lesser of applicable dollar limit (\$24,500 in 2026) or 100% of participant's includible compensation.	In 2026, \$72,000 combined employee and employer contributions annually (refer to contribution/match percentages above).
Age 50 Catch-up Provision <i>-for individuals who are age 50 or over at the end of the taxable year</i> <i>-Note: see below, cannot use in years that a participant is taking advantage of the increased limit during the final 3 years before attaining normal retirement age</i>	Salary deferral dollar limit increased by \$8,000 (up to a total of \$32,500 in 2026).	N/A
Age 60-63 Super Catch-up Provision <i>-increased contribution limit in the calendar year individuals attain age 60-63.</i> <i>-once you reach age 64, you revert to the standard age 50+ catch-up provision.</i> <i>-Note: see below 3 Year Catch Up Provision, cannot use in years that a participant is taking advantage of the increased limit during the final 3 years before attaining normal retirement age</i>	Salary deferral dollar limit increased by \$11,250 (up to a total of \$35,750 in 2026)	N/A
Vesting	100% vested immediately	100% vested immediately
3-Year Catch-up Provision <i>-Increased salary reduction limit for final 3 years before attaining normal retirement age</i> <i>-Note: see above, cannot use the increased limit if using age 50 catch up contributions. Therefore, in years</i>	Lesser of 2 x applicable dollar limit (\$49,000 in 2026) or applicable dollar limit plus sum of unused deferrals in prior years (to the extent that deferrals made were less than the applicable limits per the given year; age 50 catch up contributions are not counted for this purpose). For more information contact Amaya Fine at afine@missionsq.org	N/A

**only upon separation from service, or having attained age 59 ½*

Pet Benefit Solutions

Eligible Partnership employees can purchase voluntary Total Pet Plan for savings on pet care services and/or Wishbone Pet Health Insurance for pet care coverage.

Cafeteria Plan Flexible Spending Accounts (FSA)

Health Care FSA

Health Care FSA allows employees, not enrolled in a high-deductible health plan, to pay for eligible out-of-pocket medical expenses for themselves, their spouse, and tax-dependents regardless of if they are covered on their medical plan with pre-tax dollars through payroll deduction. Maximum allowed: \$3,400. Plan year effective January 1 through December 31.

Limited Purposes Health Care FSA

Limited Purposes Health Care FSA allows employees enrolled in a high-deductible health plan to pay for eligible out-of-pocket dental, vision, and orthodontia expenses for themselves, their spouse, and tax-dependents regardless of if they are covered on their medical plan with pre-tax dollars through payroll deduction. Maximum allowed: \$3,400. Plan year effective January 1 through December 31.

Dependent Care FSA

Dependent Care FSA allows employees to pay for qualified day care expenses for dependent children 12 years and younger and in some cases elder care, with pre-tax dollars through payroll deduction. Maximum allowed: \$7,500 per household, \$3,750 if married and filing separately. Plan year effective January 1 through December 31.

Mutual of Omaha Partnership Sponsored Group Benefits

Partnership provides all eligible employees with Short Term Disability (STD), Long Term Disability (LTD), and a Group Term Life/AD&D policy coverage through Mutual of Omaha.v

Short Term Disability Insurance

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

Long Term Disability Insurance

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

Group Life/AD&D Insurance

Benefit Amount	One times annual earnings up 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	65% at age 70 and 50% at age 75
Premium	Employer paid

Mutual of Omaha Voluntary Benefits

Employees may choose to purchase Accident Insurance, Critical Illness Insurance, and Term Life Insurance through Mutual of Omaha only during annual Open Enrollment to be effective January 1 of the following year. These benefits provide financial protection for employees and their family.

LegalShield

Employees may choose to purchase LegalShield, IDShield, or LegalShield IDShield Dual Plan through LegalShield either during annual Open Enrollment to be effective January 1 of the following year if electing payroll deductions or at any time during the year if electing direct pay. These plans provide many benefits including legal assistance, will preparation, fraud protection, dark web monitoring, and much more.

Pay Information

Paydays

Employees are paid every other Thursday. All non-exempt employees must review and confirm their electronic timesheets for supervisor or manager review by 8 a.m. on the Monday preceding payday. All exempt employees must submit any necessary electronic time off requests to their supervisor or manager by 8 a.m. on the Friday preceding payday.

Paid Time Off (PTO)

PTO is accrued based on hours paid, excluding overtime more than 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	497 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 year of employment, employees are eligible to cash-out up to their maximum annual PTO accrual during Partnership's Annual Open Enrollment period. There are two 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) and Part Time employees receive 40 hours of PSL upon date of hire. Employees are eligible to use PSL hours at the completion of 90 days of employment. Unused PSL hours do not carry over into the next year and are not paid out upon separation of employment. 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. PSL can be used for the employee and/or eligible family members of the employee for the following reasons: preventive care or diagnosis, treatment of an existing health condition, recovery from a physical/mental illness or injury or specified purposes for an employee who is a victim of domestic violence, sexual assault, or stalking.

Partnership Holidays

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

*To recognize our multi-cultural workforce, Partnership is providing employees with an eight-hour Cultural Diversity Holiday (CDH). This day must be used for religious or cultural holidays, employee birthdays, or other state or federal holidays during which Partnership remains 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

Partnership's Tuition and Certification Reimbursement Program provides a reimbursement opportunity for full-time employees who have completed six months of continuous employment that are seeking to develop their professional skills. Pre-approval must be obtained from their Department Director and Training and Development in Human Resources. Qualifying courses must be completed in an accredited educational institution and must be job-related and relevant to current job responsibilities or planned career progression. Partnership will reimburse 75% of approved employee-paid educational expenses, up to \$4,000.00 per calendar year.

Employee Assistance Program

The Claremont Employee Assistance Program (EAP) is a premier resource dedicated to improving quality of life. Highly skilled licensed professionals are available 24/7 to provide confidential support, guidance and referrals for issues and challenges employees may be experiencing. The EAP is available to all employees and their qualified family members living with them (including domestic partners). There is no cost to employees. The following is a brief overview:

- *5 counseling visits per incident*
- *Family, relationship and parenting issues*
- *Child and elder care needs*
- *Emotional and stress-related issues*
- *Conflicts at home or work*
- *Alcohol and drug dependencies*
- *Will preparation*

Commuter Benefits

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

Travel Assistance Program

As part of your employee benefits package, your Mutual of Omaha Group Life Insurance includes Worldwide Travel and ID Theft Assistance. While traveling more than 100 miles from home you may access travel assistance services 24/7 by calling (800) 856-9947. Your travel assistance benefit automatically includes identity theft assistance at no additional cost

Who Do You Contact for Benefits Assistance?

Employees can contact the Human Resources team at HRHelpdesk@partnershiphp.org if they have questions after contacting member services at one of the insurance providers.

For additional questions, employees can contact Partnership's Client Services Manager:

Patti Harvey

pharvey@acrisure.com

(408) 350-5738

Note: For more information, visit <https://mybenefits.cc/partnership/> to review plan designs, required notices, evidence of coverage, documents, and much more.



PartnershipHP.org



PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR506			Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development			☐ External Policy ☒ Internal Policy	
Original Date: 04/17/1995		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ 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.
- 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](#)
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- 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

Policy/Procedure Number: HR506		Lead Department: Human Resources	
Policy/Procedure Title: Employee Reimbursement for Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
Original Date: 04/17/1995		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 must be included with submission.

a. Entertainment expenses are not reimbursable.

b. Lodging incidentals are not covered by Partnership and should be charged to the employee's personal credit card. This includes items but not limited to laundry, spa treatments, mini-bar usage and damages.

a-c. Partnership is not responsible for the expenses of a spouse, guest, or pet who accompanies an employee while traveling on Partnership business.

b-d. Without receipt and an approved justification for the expense, the employee will not receive reimbursement.

e-e. 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

- 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

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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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.
- 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
 - 2) Receipt of payment
- c. Continuing education will be compensated as hours worked in accordance with applicable

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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, 07/17/2025 (no revision, review only)

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			☐ External Policy ☒ Internal Policy	
Original Date: 04/17/1995		Next Review Date: 03/03/2027 Last Review Date: 03/03/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 04/30/2026	

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.
- 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.

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 - 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
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Policy/Procedure Number: HR506		Lead Department: Human Resources	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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, 07/17/2025 (no revision, review only), 03/03/2026

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR507		Lead Department: Human Resources	
Policy/Procedure Title: Remote Work Program		☐ External Policy ☒ Internal Policy	
Original Date: 03/17/1997 ☐		Next Review Date: 06/17/2027 26/2025 Last Review Date: ☐ 06/26/2024 17/2026	
Applies to:	☐ Medi-Cal ☐ Healthy Kids	☐ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE ☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE ☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 06/26/2024

I. RELATED POLICIES:

- A. [HR104](#)
- B. [HR403](#)
- ~~A.C.~~ [HR504](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. **Approved Remote Location:** An approved location, other than a Partnership [HealthPlan of California \(Partnership\)](#) office, where job duties and business are performed. A remote employee's approved remote location must match their home address in ADP. All approved remote locations are subject to the approvals described in this policy. Exceptions may be made with approval from the CEO and ~~Sr. Director of HR-CHRO.~~
- B. **Partnership office:** Any Partnership ~~HealthPlan of California~~ office where employees are located and assigned for job duties and the organization's business. All employees will be assigned a Partnership office.
- C. **Remote Work Program:** A work arrangement where the employee enters into a formal agreement with Partnership ~~HealthPlan of California~~ to perform his/her usual job duties in an approved remote location per the frequency and manner outlined in their Remote Work Agreement.
- D. **Full-Time Remote Employee:** An employee who works ~~less than 20%~~ [less than 20%](#) ~~or less~~ in a Partnership office. Occasionally works at a Partnership office as required by the organization or their department leadership. This classification will require the employee to reserve a workspace through Eptura when working in a Partnership office.
 - 1. Example: working three days or less in the office a month
- E. **Part-Time or "hybrid" Remote Employee:** An employee who works more than 20% but less than 80% in a Partnership office. The employee will work in a Partnership office as required by their department

leadership and as indicated on their Remote Work Agreement. This classification will require the employee to reserve a workspace through Eptura when working in a Partnership office.

1. Example 1: one week in office/one week working remote

2. Example 2: working between one to ~~four~~three days a week in the office

F. **In-Office Employee:** An employee who works 80% or more in a Partnership office. Employees must notify and receive approval from their department head before working remotely and, while working remotely, must have the ability to do so without IT Support. This classification will have a designated workspace in a Partnership office.

1. Example 1: working at least 4 days in the office a week

G. **Hotel Space:** A workspace in a Partnership office that is available for remote employees to reserve.

IV. ATTACHMENTS:

A. [Remote Work Agreement](#)

B. [Remote Work Best Practices](#)

C. [Concur Remote Travel Reimbursement Quick Reference Guide](#)

D. [Initiating Remote Work Deployment Process](#)

~~E.~~

V. PURPOSE:

To provide Partnership ~~HealthPlan of California~~ management and staff with appropriate guidance for requesting, approving, and conducting work at alternative work locations for all or part of their workweek. The purpose of the Remote Work Program is to develop a work structure that supports working from an alternative work location in order to support or improve productivity, job performance, and to recruit and retain skilled employees by enhancing work/life balance.

VI. POLICY / PROCEDURE:

A. About the Remote Work Program:

1. Partnership ~~HealthPlan of California~~ is committed to providing high-quality healthcare to its members and in the communities it serves. Partnership ~~HealthPlan of California~~ believes that some employees are able to meet this commitment through flexible, diverse, and alternative work locations or schedules that enhance an individual's strengths and performance, without compromising their work quality, efficiency, or productivity. Partnership ~~HealthPlan of California~~ is committed to providing a work environment that assists employees in achieving a proper balance between their work, home, and family obligations. In some cases, this balance can best be achieved by allowing employees to perform some or all of their work from their homes when they can do so without compromising their work quality, efficiency, or productivity.
2. The Remote Work Program is a voluntary, alternative method of meeting the needs of the organization through a flexible work structure. It is not a universal employee benefit or entitlement and it may be revoked at any time.
3. Employees who are approved for the Remote Work Program will be required to sign a Remote Work Agreement consistent with this Policy.
4. The Remote Work Agreement may be established for a long-term or short-term period, and is subject to review per the frequency outlined on the Remote Work Agreement.
5. The decision to approve a remote work location and/or schedule is on a case-by-case basis.
6. All employees participating in the Remote Work Program are expected to perform the same work that they would in the central workplace in accordance with their same performance expectations, job duties, and Partnership ~~HealthPlan of California~~ policies.
7. Working remotely may also be considered on a case-by-case basis as a reasonable

accommodation as provided by the policy HR703 Family and Medical Leave, for qualified employees.

8. Exceptions to this policy may be made at the discretion of the CEO.

B. Responsibilities and Approvals

1. Department Directors are responsible for evaluating their department and determining if the Remote Work Program is appropriate.
2. Prior to approving remote work, department management must consider the impact the proposed work schedule will have on fellow employees and employee morale, as well as the functional needs of the department as a whole. The department Directors are responsible to ensure necessary adjustments are implemented and that the remote work policy is administered in a manner that will positively impact their departments.

~~C. Initiating Remote Deployment:~~

- ~~1. Position eligibility must have approval from the CEO.~~
- ~~2. Once a position is approved, a conversation must occur between the employee and their direct supervisor to discuss the remote work schedule. A signed Remote Work Agreement (HR507A) must be submitted to the HRHelpDesk@partnershiphp.org. The remote work schedule will be reviewed on an annual basis, during the annual review process.~~
- ~~3. Once HR receives a signed Remote Work Agreement, they will notify Facilities and IT to begin the deployment process.~~
 - ~~a. An Equipment Test Day will be scheduled based on IT resources.~~
 - ~~b. The employee will meet with IT on the Equipment Test Day to review the equipment and proper setup procedures.~~
 - ~~c. The employee will bring home and set up the equipment with IT assistance as needed.~~
 - ~~d. The employee will remain working from home for the remainder of the Equipment Test Day, but will return to working in the office the following business day.~~
 - ~~e. HR will notify the employee and their direct supervisor of the official deployment date, which is determined by HR and will coincide with the beginning of a pay period.~~~~Exceptions may be made on a case-by-case basis.~~

~~D.C.~~ Remote Work Eligibility Criteria:

1. Selection of employees shall not be arbitrary, based on seniority, and/or previous or current department participation in the Remote Work Program. Instead, the approval of an employee's request shall be based on specific, work-related criteria that department leadership will use in determining eligibility and suitability.
2. Supervisors, Managers, Directors, or Executive-level employees are not eligible for full-time remote work. At the discretion of the CEO, exceptions may be made for Supervisors and Managers.
3. The positions must:
 - a. Be able to be performed effectively away from a Partnership office
 - b. Allow work to be accessed from the employee's approved remote location while ensuring confidentiality where necessary and compliance with HIPAA regulations
 - c. Not require a daily physical presence at a Partnership office.
 - d. Not be dependent on accessing equipment, materials, files, etc., that are only available in a Partnership office.

4. The Remote Work candidate must:
 - a. Be able to perform job duties independently with little supervision or feedback required.
 - b. Demonstrate good attendance, punctuality, performance, responsibility, and reliability.
 - c. Demonstrate a high level of productivity, responsiveness and accountability.
 - d. Demonstrate effective communication skills.
 - e. Have the ability to establish priorities and effectively manage their time.
 - f. Have available workspace at their approved remote location that is conducive to conducting the job functions and duties similar to that of a Partnership office location. Requirements include:
 - A defined workspace for conducting telephone and/or video calls free from interruption or distraction.
 - A secure location or receptacle for storing Partnership issued equipment and/or PHI in accordance with all Partnership Compliance policies
 - A secure process to dispose of or destroy printed PHI
 - Access to or near network/internet connection
 - A broadband Internet connection such as DSL, cable, or fiber. Broadband Internet is defined as having a minimum of 25 Mbps download and 3 Mbps upload speeds. IT will not support an employee's home network. Satellite Internet service such as Starlink, Frontier, HughesNet, or any ISP that uses wireless towers to provide broadband Internet, are not supported.
 - g. Adhere to all regulations when transporting, storing, sharing, or disposing of printed PHI
 - Printed PHI should be securely disposed of in a timely manner when no longer needed.
5. All Partnership-provided computer and phone equipment is to be connected to the primary Internet modem via Ethernet cabling. Connecting Partnership equipment to network extenders or repeaters is not supported.
- ~~6.~~ 6. -Working remotely is not intended to serve as a substitute for child or adult care. If children or adults in need of care are in the Approved Remote Location during employees' work hours, another person must be present to provide the care.
- ~~6.7.~~ 6.7. -As Partnership strives to keep a local footprint no additional out of state remote work is being granted.

~~E.D.~~ E.D. Ergonomic Equipment:

1. Ergonomic Assessments:
 - a. Approved remote locations and workspaces at Partnership offices are eligible for ergonomic assessments per policy HR104.
2. Specialty ergonomic equipment and/or ergonomic equipment that requires Partnership ergonomic evaluation and -installation by Facilities (a desk, chair, Morency rest, etc.):
 - a. It is the employee's responsibility when these items are required or recommended for the approved remote location.
 - b. Part-time remote employees with specialty/installed ergonomic needs may be assigned a workspace at a Partnership office. This workspace will not be available for reservation in Eptura, and will be a dedicated workspace for the employee when working in the office.
3. Basic or non-installed ergonomic equipment (keyboard, mouse, backrest, etc.)
 - a. It is the remote employee's responsibility to bring this equipment to and from their approved remote location and a Partnership office. Two sets of this equipment will not be provided.
4. For additional information regarding office ergonomics refer to policy HR104.

~~F.~~ F. ~~Mileage Reimbursement and Compensable time for Remote Workers~~

- ~~1. Part-Time Remote: Employees will not be reimbursed mileage to travel to their assigned~~

Partnership office. If employees are required to travel to any Partnership office to which they are not assigned, or any location that is not a Partnership office, they will be reimbursed their mileage in excess of their normal commute.

a. ~~Example: Employee lives 5 miles away from their assigned Partnership office. 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 they will be reimbursed for mileage from their home to any Partnership office, minus 30 miles one way as this is considered a reasonable commute radius, regardless of their assigned Partnership office. If employees are required to travel to any location that is not a Partnership office, they will be reimbursed from their starting location.~~

a. ~~Example 1: Employee travels 31 miles to a Partnership office, employee will be reimbursed for one mile.~~

b. ~~Example 2: Employee travels to Dr. Smith's office from their home, they will be reimbursed the full distance traveled.~~

3. ~~Reimbursable events: Employees will be eligible for mileage reimbursement when they are required to drive to a Partnership office to attend required events. Employees will not be eligible for mileage reimbursement when they choose to attend a voluntary event at a Partnership office.~~

a. ~~See table for events that are considered reimbursable and not reimbursable. Department leadership will determine what are required teambuilding activities and what are voluntary engagement activities:~~

Reimbursable	Non-Reimbursable
Employee Recognition Celebration (May)	Appreciation Luncheon (November)
Town Halls	Summer Celebration
Required Teambuilding Activities	Fundraisers
Department Meetings	Craft Fair
Task Force Meetings	Halloween
	Pictures with Santa
	Ice Cream Social
	Voluntary Engagement Activities

~~**Out of State Employees or those more than 300 miles from their assigned Partnership Office:** Employees will be reimbursed for up to two visits to their assigned 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.~~

~~**Compensable Time for all Remote Workers:** Partnership highly encourages remote workers to start and end their workday at a Partnership office when it's necessary to come in for meetings or other activities. When starting/ending your workday at a Partnership office, travel time is not compensable.~~

~~If an employee is required to travel to a Partnership office for required meetings/activities during their regularly scheduled work hours, it is considered compensable time.~~

~~If an employee chooses to travel to a Partnership office for voluntary activities with no other work being performed as outlined below, it is not considered compensable time. —~~

~~Outside of normal business hours (lunch, weekends)~~

~~Voluntary~~

~~Not job related~~

~~No other work concurrently performed~~

G.E. General Expectations and Conditions:

1. Compliance with Policies.

- a. Employees must agree to comply with all Partnership rules, policies, practices and instructions and understand that violation of such may result in the termination of the remote work arrangement and/or disciplinary action, up to and including dismissal. Employees who participate in the Remote Work Program will be subject to the same policies as other employees, including policies relating to information security and data protection, dress code, professionalism, attendance & punctuality, etc.

2. Performance

- a. Employees working remotely must be on video during all work meetings. Approved remote work locations that don't support the use of video conferencing (i.e. internet bandwidth, environment, etc.) will be closely reviewed on a case-by-case basis and may affect the employee's ability to participate in the Remote Work Program.
- b. When participating in video and/or teleconferencing activities, remote work employees are expected to adhere to all professional practices and the organization's code of conduct per policy HR403 – Appearance & Hygiene.

~~Employees working remotely must be on video during all work meetings. Approved remote work locations that don't support the use of video conferencing (i.e. internet bandwidth, environment, etc.) will be closely reviewed on a case by case basis and may affect the employee's ability to participate in the Remote Work Program.~~

~~When participating in video and/or teleconferencing activities, remote work employees are expected to adhere to all professional practices and the organization's code of conduct.~~

~~a-c.~~ Employees who participate in full-time or part-time hybrid remote work must indicate remote work days on their Outlook calendar and SkypeWebEx.

~~b-d.~~ Employees are required to attend in-person meetings, trainings and/or other Partnership HealthPlan of California business when indicated or directed by a member of their department leadership and as outlined in their Remote Work Agreement. The Remote Work Agreement will be reviewed by supervisor and employee at least annually and subject to change at any time to meet the needs of the organization.

e. Employees are expected to work at their approved remote location or at a Partnership office. If at any time the employee travels to a location not approved as an approved remote location or a Partnership office, they must receive approval from the CEO, CIO and Sr. Director of HRCHRO, with recommendation and justification from their department head. Exceptions may be made for travel due to business needs, such as an offsite meeting and conference attendance.

~~e-f.~~ Business needs that require employees to work away from his or her regular work site refer to HR512, Mileage Reimbursement policy.

2.3. Hours of Work

- a. The total number of hours that employees are expected to work will not change, regardless of work location. Partnership HealthPlan of California also expects the same level of productivity from staff participating in the Remote Work Program that is expected from employees in a Partnership office. Employees are expected to meet their work commitments as if they were working at their assigned Partnership office.
- b. Employees who are not exempt from the overtime requirements of the Fair Labor

Standards Act will be required to record all hours worked in accordance with policy HR504. Hours worked in excess of those specified in the Remote Work Agreement will require the advance approval of the Supervisor.

3.4. Costs of the Remote Work Program Participation

- a. Working remotely is a voluntary program. Partnership is not obligated to assume responsibility for operating costs, home maintenance, or other costs incurred by employees in the use of their homes as an approved remote location.
- b. Necessary office supplies or ancillary required items are to follow normal departmental requests and processing workflows.

4.5. Privacy and Compliance

- a. Employees must safeguard information used or accessed while working in an approved remote location, in accordance with the organization's privacy and compliance standards set forth in the compliance and informational technology policies. Violation of these policies, or any other of policies related to compliance or data safety may result in disciplinary action including termination.

5.6. Emergency Procedures:

- a. If a Partnership office is closed due to an emergency disaster or inclement weather, the remote employee will be contacted by their Supervisor and/or through Alert Media. The remote worker is expected to work business as usual at their approved remote location.
- b. If there is an emergency at the approved remote location, such as a power outage, the remote worker will notify their supervisor as soon as possible. To the extent possible, management will include a description of emergency duties if emergency duties differ from the remote worker's normal duties. If the employee is unable to perform normal or emergency duties (due to the nature of the position; i.e. dependent of phone/computer), the employee will be given the option to:
 - a. Return to a Partnership office location. The travel time to a Partnership office will not be compensable.
 - b. Take PTO or unpaid time off if the option to travel to a Partnership office is unreasonable (i.e. employee's home office is more than 50 miles from a Partnership office; the power failure occurs within the last 2 hours of the employee's scheduled work time).
- c. If there are issues with Partnership equipment (laptop, phone, monitors, etc.) issued to a remote employee and the employee is unable to perform their duties, the employee must notify their supervisor as soon as possible. If the equipment must be fixed in the office by IT, the commute to a Partnership office will be compensable.

6.7. Liability

- a. The remote worker is solely responsible for ensuring the safety of his or her approved remote location.
- b. The remote worker's home workspace is an extension of Partnership ~~HealthPlan of California~~ workspace only when used for work. Employees may therefore be covered for workers' compensation if they are injured while performing work on behalf of Partnership ~~HealthPlan of California~~ in the remote work site workspace during remote work hours.
- c. For all ergonomic issues please refer to policy HR104 (Office Ergonomics) for reporting and procedures.
- d. Because Partnership ~~HealthPlan of California~~ may be liable for hazards that might cause serious harm or injury, the company reserves the right to periodically inspect the remote worker's workspace. Any such inspection will be preceded by advance notice and an appointment will be scheduled.
- e. Partnership ~~HealthPlan of California~~ will not be held liable for any incident or accident that

occurs outside of normal job related activities.

- f. In the event of a job-related incident or accident during remote work hours, the employee must immediately report the incident to their supervisor. The employee, supervisor, and agency must follow the policies regarding the reporting of injuries for employees injured while at work.
- g. Partnership ~~HealthPlan of California~~ is not responsible for any injuries to family members, visitors, and others in the remote work workspace.
- h. Partnership ~~HealthPlan of California~~ will not be responsible for any loss or damage to:
 - a. The remote worker's property
 - b. Personal property owned by the employee or any of the employee's family members
 - c. Property of others in custody of the employee
- i. The employee is responsible for contacting their insurance agent and a tax consultant and consulting local ordinances for information regarding home workplaces.

H.F. Terms of Remote Work:

- 1. Partnership ~~HealthPlan of California~~ retains the right in its sole discretion to designate positions that are appropriate for remote work and approve employees for the remote work program. Other than those duties and obligations expressly imposed on the employee under the Remote Work Agreement, working remotely does not change the conditions of employment or required compliance with all of Partnership's ~~HealthPlan of California's~~ policies and procedures. Failure to follow policy, rules, and procedures may result in termination of the telework arrangement and/or disciplinary action.
- 2. Partnership ~~HealthPlan of California~~ reserves the right to change or terminate the Remote Work Agreement at any time, without cause or advance notice. Remote Work will be voluntary and may be terminated by the employee, unless specifically stated as a condition of employment.
- 3. An employee's ability to work under a Remote Work Agreement rests in the sole discretion of Partnership.
- 4. Employees who currently receive "live" paper paychecks are highly encouraged to enroll in direct deposit. Questions should be directed to Payrollhelpdesk@partnershiphp.org.

H.G. Removal from Remote Work Program:

- 1. It is at management's discretion to assign or remove this privilege at any time based on business needs, performance, or changes in the eligibility status of the participant. The employee's supervisor must email HRHelpDesk@partnershiphp.org if this privilege is revoked. Human Resources will determine the effective date of the employee's new remote status.
- 2. Upon removal from program and/or employee termination, voluntary or otherwise, the employee is required to return all property of Partnership ~~HealthPlan of California~~. Property that is not returned, as defined above, will be deemed stolen property and the appropriate action may be taken.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES: 10/18/2012, 02/05/2014, 03/03/2015, 08/08/2018, 06/26/2019, 07/07/2021, 12/14/2021, 04/10/2023, 07/06/2023, 01/01/2024, 06/26/2024, 06/17/2026

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR507			Lead Department: Human Resources		
Policy/Procedure Title: Remote Work Program			☐ External Policy ☒ Internal Policy		
Original Date: 03/17/1997			Next Review Date: 06/17/2027 Last Review Date: 06/17/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☐ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC		
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT	
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC	
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER		
Approval Signature: Sonja Bjork			Approval Date: 06/30/2026		

I. RELATED POLICIES:

- A. [HR104](#)
- B. [HR403](#)
- C. [HR504](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS:

- A. **Approved Remote Location:** An approved location, other than a Partnership HealthPlan of California (Partnership) office, where job duties and business are performed. A remote employee's approved remote location must match their home address in ADP. All approved remote locations are subject to the approvals described in this policy. Exceptions may be made with approval from the CEO and CHRO.
- B. **Partnership office:** Any Partnership office where employees are located and assigned for job duties and the organization's business. All employees will be assigned a Partnership office.
- C. **Remote Work Program:** A work arrangement where the employee enters into a formal agreement with Partnership to perform his/her usual job duties in an approved remote location per the frequency and manner outlined in their Remote Work Agreement.
- D. **Full-Time Remote Employee:** An employee who works less than 20% in a Partnership office. Occasionally works at a Partnership office as required by the organization or their department leadership. This classification will require the employee to reserve a workspace through Eptura when working in a Partnership office.
 - 1. Example: working three days or less in the office a month
- E. **Part-Time or "hybrid" Remote Employee:** An employee who works more than 20% but less than 80% in a Partnership office. The employee will work in a Partnership office as required by their department leadership and as indicated on their Remote Work Agreement. This classification will require the employee to reserve a workspace through Eptura when working in a Partnership office.
 - 1. Example 1: one week in office/one week working remote
 - 2. Example 2: working between one to three days a week in the office

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F. **In-Office Employee:** An employee who works 80% or more in a Partnership office. Employees must notify and receive approval from their department head before working remotely and, while working remotely, must have the ability to do so without IT Support. This classification will have a designated workspace in a Partnership office.

1. Example 1: working at least 4 days in the office a week

G. **Hotel Space:** A workspace in a Partnership office that is available for remote employees to reserve.

IV. ATTACHMENTS:

- A. [Remote Work Agreement](#)
- B. [Remote Work Best Practices](#)
- C. [Concur Remote Travel Reimbursement Quick Reference Guide](#)
- D. [Initiating Remote Work Deployment Process](#)

V. PURPOSE:

To provide Partnership management and staff with appropriate guidance for requesting, approving, and conducting work at alternative work locations for all or part of their workweek. The purpose of the Remote Work Program is to develop a work structure that supports working from an alternative work location in order to support or improve productivity, job performance, and to recruit and retain skilled employees by enhancing work/life balance.

VI. POLICY / PROCEDURE:

A. About the Remote Work Program:

1. Partnership is committed to providing high-quality healthcare to its members and in the communities it serves. Partnership believes that some employees are able to meet this commitment through flexible, diverse, and alternative work locations or schedules that enhance an individual's strengths and performance, without compromising their work quality, efficiency, or productivity. Partnership is committed to providing a work environment that assists employees in achieving a proper balance between their work, home, and family obligations. In some cases, this balance can best be achieved by allowing employees to perform some or all of their work from their homes when they can do so without compromising their work quality, efficiency, or productivity.
2. The Remote Work Program is a voluntary, alternative method of meeting the needs of the organization through a flexible work structure. It is not a universal employee benefit or entitlement and it may be revoked at any time.
3. Employees who are approved for the Remote Work Program will be required to sign a Remote Work Agreement consistent with this Policy.
4. The Remote Work Agreement may be established for a long-term or short-term period, and is subject to review per the frequency outlined on the Remote Work Agreement.
5. The decision to approve a remote work location and/or schedule is on a case-by-case basis.
6. All employees participating in the Remote Work Program are expected to perform the same work that they would in the central workplace in accordance with their same performance expectations, job duties, and Partnership policies.
7. Working remotely may also be considered on a case-by-case basis as a reasonable accommodation as provided by the policy HR703 Family and Medical Leave, for qualified employees.
8. Exceptions to this policy may be made at the discretion of the CEO.

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B. Responsibilities and Approvals

1. Department Directors are responsible for evaluating their department and determining if the Remote Work Program is appropriate.
2. Prior to approving remote work, department management must consider the impact the proposed work schedule will have on fellow employees and employee morale, as well as the functional needs of the department as a whole. The department Directors are responsible to ensure necessary adjustments are implemented and that the remote work policy is administered in a manner that will positively impact their departments.

C. Remote Work Eligibility Criteria:

1. Selection of employees shall not be arbitrary, based on seniority, and/or previous or current department participation in the Remote Work Program. Instead, the approval of an employee's request shall be based on specific, work-related criteria that department leadership will use in determining eligibility and suitability.
2. Supervisors, Managers, Directors, or Executive-level employees are not eligible for full-time remote work. At the discretion of the CEO, exceptions may be made for Supervisors and Managers.
3. The positions must:
 - a. Be able to be performed effectively away from a Partnership office
 - b. Allow work to be accessed from the employee's approved remote location while ensuring confidentiality where necessary and compliance with HIPAA regulations
 - c. Not require a daily physical presence at a Partnership office.
 - d. Not be dependent on accessing equipment, materials, files, etc., that are only available in a Partnership office.
4. The Remote Work candidate must:
 - a. Be able to perform job duties independently with little supervision or feedback required.
 - b. Demonstrate good attendance, punctuality, performance, responsibility, and reliability.
 - c. Demonstrate a high level of productivity, responsiveness and accountability.
 - d. Demonstrate effective communication skills.
 - e. Have the ability to establish priorities and effectively manage their time.
 - f. Have available workspace at their approved remote location that is conducive to conducting the job functions and duties similar to that of a Partnership office location. Requirements include:
 - A defined workspace for conducting telephone and/or video calls free from interruption or distraction.
 - A secure location or receptacle for storing Partnership issued equipment and/or PHI in accordance with all Partnership Compliance policies
 - A secure process to dispose of or destroy printed PHI
 - Access to or near network/internet connection
 - A broadband Internet connection such as DSL, cable, or fiber. Broadband Internet is defined as having a minimum of 25 Mbps download and 3 Mbps upload speeds. IT will not support an employee's home network. Satellite Internet service such as Starlink, Frontier, HughesNet, or any ISP that uses wireless towers to provide broadband Internet, are not supported.
 - g. Adhere to all regulations when transporting, storing, sharing, or disposing of printed PHI
 - Printed PHI should be securely disposed of in a timely manner when no longer needed.
5. All Partnership-provided computer and phone equipment is to be connected to the primary Internet modem via Ethernet cabling. Connecting Partnership equipment to network extenders or repeaters is not supported.
6. Working remotely is not intended to serve as a substitute for child or adult care. If children or adults

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in need of care are in the Approved Remote Location during employees' work hours, another person

must be present to provide the care.

7. As Partnership strives to keep a local footprint no additional out of state remote work is being granted.

D. Ergonomic Equipment:

1. Ergonomic Assessments:
 - a. Approved remote locations and workspaces at Partnership offices are eligible for ergonomic assessments per policy HR104.
2. Specialty ergonomic equipment and/or ergonomic equipment that requires Partnership ergonomic evaluation and installation by Facilities (a desk, chair, Morency rest, etc.):
 - a. It is the employee's responsibility when these items are required or recommended for the approved remote location.
 - b. Part-time remote employees with specialty/installed ergonomic needs may be assigned a workspace at a Partnership office. This workspace will not be available for reservation in Eptura, and will be a dedicated workspace for the employee when working in the office.
3. Basic or non-installed ergonomic equipment (keyboard, mouse, backrest, etc.)
 - a. It is the remote employee's responsibility to bring this equipment to and from their approved remote location and a Partnership office. Two sets of this equipment will not be provided.
4. For additional information regarding office ergonomics refer to policy HR104.

E. General Expectations and Conditions:

1. Compliance with Policies.
 - a. Employees must agree to comply with all Partnership rules, policies, practices and instructions and understand that violation of such may result in the termination of the remote work arrangement and/or disciplinary action, up to and including dismissal. Employees who participate in the Remote Work Program will be subject to the same policies as other employees, including policies relating to information security and data protection, dress code, professionalism, attendance & punctuality, etc.
2. Performance
 - a. Employees working remotely must be on video during all work meetings. Approved remote work locations that don't support the use of video conferencing (i.e. internet bandwidth, environment, etc.) will be closely reviewed on a case-by-case basis and may affect the employee's ability to participate in the Remote Work Program.
 - b. When participating in video and/or teleconferencing activities, remote work employees are expected to adhere to all professional practices and the organization's code of conduct per policy HR403 – Appearance & Hygiene.
 - c. Employees who participate in full-time or part-time hybrid remote work must indicate remote work days on their Outlook calendar and WebEx.
 - d. Employees are required to attend in-person meetings, trainings and/or other Partnership business when indicated or directed by a member of their department leadership and as outlined in their Remote Work Agreement. The Remote Work Agreement will be reviewed by supervisor and employee at least annually and subject to change at any time to meet the needs of the organization.
 - e. Employees are expected to work at their approved remote location or at a Partnership office. If at any time the employee travels to a location not approved as an approved remote location or a Partnership office, they must receive approval from the CEO, CIO

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and CHRO, with recommendation and justification from their department head.

Exceptions may be made for travel due to business needs, such as an offsite meeting and conference attendance.

- f. Business needs that require employees to work away from his or her regular work site refer to HR512, Mileage Reimbursement policy.

3. Hours of Work

- a. The total number of hours that employees are expected to work will not change, regardless of work location. Partnership also expects the same level of productivity from staff participating in the Remote Work Program that is expected from employees in a Partnership office. Employees are expected to meet their work commitments as if they were working at their assigned Partnership office.
- b. Employees who are not exempt from the overtime requirements of the Fair Labor Standards Act will be required to record all hours worked in accordance with policy HR504. Hours worked in excess of those specified in the Remote Work Agreement will require the advance approval of the Supervisor.

4. Costs of the Remote Work Program Participation

- a. Working remotely is a voluntary program. Partnership is not obligated to assume responsibility for operating costs, home maintenance, or other costs incurred by employees in the use of their homes as an approved remote location.
- b. Necessary office supplies or ancillary required items are to follow normal departmental requests and processing workflows.

5. Privacy and Compliance

- a. Employees must safeguard information used or accessed while working in an approved remote location, in accordance with the organization's privacy and compliance standards set forth in the compliance and informational technology policies. Violation of these policies, or any other of policies related to compliance or data safety may result in disciplinary action including termination.

6. Emergency Procedures:

- a. If a Partnership office is closed due to an emergency disaster or inclement weather, the remote employee will be contacted by their Supervisor and/or through Alert Media. The remote worker is expected to work business as usual at their approved remote location.
- b. If there is an emergency at the approved remote location, such as a power outage, the remote worker will notify their supervisor as soon as possible. To the extent possible, management will include a description of emergency duties if emergency duties differ from the remote worker's normal duties. If the employee is unable to perform normal or emergency duties (due to the nature of the position; i.e. dependent of phone/computer), the employee will be given the option to:
 - a. Return to a Partnership office location. The travel time to a Partnership office will not be compensable.
 - b. Take PTO or unpaid time off if the option to travel to a Partnership office is unreasonable (i.e. employee's home office is more than 50 miles from a Partnership office; the power failure occurs within the last 2 hours of the employee's scheduled work time).
- c. If there are issues with Partnership equipment (laptop, phone, monitors, etc.) issued to a remote employee and the employee is unable to perform their duties, the employee must notify their supervisor as soon as possible. If the equipment must be fixed in the office by IT, the commute to a Partnership office will be compensable.

7. Liability

- a. The remote worker is solely responsible for ensuring the safety of his or her approved remote

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location.

- b. The remote worker's home workspace is an extension of Partnership workspace only when used for work. Employees may therefore be covered for workers' compensation if they are injured while performing work on behalf of Partnership in the remote work site workspace during remote work hours.
- c. For all ergonomic issues please refer to policy HR104 (Office Ergonomics) for reporting and procedures.
- d. Because Partnership may be liable for hazards that might cause serious harm or injury, the company reserves the right to periodically inspect the remote worker's workspace. Any such inspection will be preceded by advance notice and an appointment will be scheduled.
- e. Partnership will not be held liable for any incident or accident that occurs outside of normal job related activities.
- f. In the event of a job-related incident or accident during remote work hours, the employee must immediately report the incident to their supervisor. The employee, supervisor, and agency must follow the policies regarding the reporting of injuries for employees injured while at work.
- g. Partnership is not responsible for any injuries to family members, visitors, and others in the remote work workspace.
- h. Partnership will not be responsible for any loss or damage to:
 - a. The remote worker's property
 - b. Personal property owned by the employee or any of the employee's family members
 - c. Property of others in custody of the employee
- i. The employee is responsible for contacting their insurance agent and a tax consultant and consulting local ordinances for information regarding home workplaces.

F. Terms of Remote Work:

1. Partnership retains the right in its sole discretion to designate positions that are appropriate for remote work and approve employees for the remote work program. Other than those duties and obligations expressly imposed on the employee under the Remote Work Agreement, working remotely does not change the conditions of employment or required compliance with all of Partnership's policies and procedures. Failure to follow policy, rules, and procedures may result in termination of the telework arrangement and/or disciplinary action.
2. Partnership reserves the right to change or terminate the Remote Work Agreement at any time, without cause or advance notice. Remote Work will be voluntary and may be terminated by the employee, unless specifically stated as a condition of employment.
3. An employee's ability to work under a Remote Work Agreement rests in the sole discretion of Partnership.
4. Employees who currently receive "live" paper paychecks are highly encouraged to enroll in direct deposit. Questions should be directed to Payrollhelpdesk@partnershiphp.org.

G. Removal from Remote Work Program:

1. It is at management's discretion to assign or remove this privilege at any time based on business needs, performance, or changes in the eligibility status of the participant. The employee's supervisor must email HRHelpDesk@partnershiphp.org if this privilege is revoked. Human Resources will determine the effective date of the employee's new remote status.
2. Upon removal from program and/or employee termination, voluntary or otherwise, the employee is required to return all property of Partnership. Property that is not returned, as defined above, will be deemed stolen property and the appropriate action may be taken.

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VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES: 10/18/2012, 02/05/2014, 03/03/2015, 08/08/2018, 06/26/2019, 07/07/2021, 12/14/2021, 04/10/2023, 07/06/2023, 01/01/2024, 06/26/2024, 06/17/2026

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR508			Lead Department: Human Resources	
Policy/Procedure Title: Compensation			☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/2025 03/003/2027 Last Review Date: 08/05/2024 03/03/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ 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 (PHCPartnership) 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		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/2025 03/03/2027 Last Review Date: 08/05/2024 03/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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~~Chief of Human Resources (~~CHRO~~) 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.

Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/2025 03/03/2027 Last Review Date: 08/05/2024 03/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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-Partnership~~ 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:

Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 08/05/202503/03/2027 Last Review Date: 08/05/202403/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

A. N/A

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, 03/03/2026

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR508			Lead Department: Human Resources	
Policy/Procedure Title: Compensation			☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 03/03/2027 Last Review Date: 03/03/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ PAC
Approval Signature: Sonja Bjork			Approval Date: 04/30/2026	

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 (Partnership) 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:

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Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 03/03/2027 Last Review Date: 03/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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 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 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.
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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 Human Resources. Requests must be made using the Promotion/Equity Justification Request form.

Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 03/03/2027 Last Review Date: 03/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 - 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.
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 - 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 Partnership 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

Policy/Procedure Number: HR508		Lead Department: Human Resources	
Policy/Procedure Title: Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 08/29/2017		Next Review Date: 03/03/2027 Last Review Date: 03/03/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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, 03/03/2026

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			☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2004		Next Review Date: 02/21/2026 04/23/2027 Last Review Date: 02/21/2025 04/23/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 03/24/2025	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
A. All departments

III. DEFINITIONS:

A. Member Facing Department: Behavioral Health, Care Coordination, Enhanced Health Services, Grievance and Appeals, Health Equity, Member Services, Population Health, Transportation, and Utilization Management

B. Threshold languages: Punjabi, Russian, Spanish, and Tagalog

~~**III.IV. Member Facing Department: Member Services, Enhanced Health Services Utilization Management, Population Health, Care Coordination, Grievance, and Transportation.**~~

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

V.VI. PURPOSE:

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

VI.VII. 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:
 - 1) Pre-employment Bilingual Testing
 - 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

Policy/Procedure Number: HR509		Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards		☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2004		Next Review Date: 04/23/2027 02/16/2025 Last Review Date: 02/16/2024 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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.
- 2) Bilingual Testing for Existing Employees
 - a) A manager must submit a request to Human Resources to administer the bilingual examination
 - b) HR will confirm that the job description references a bilingual skill preference.
 - c) HR will reach out to the employee and management team to schedule the test.
 - d) Once HR receives the results, the employee and the department leadership will be notified of the outcome and whether or not the employee passed the exam.
 - e) If the employee passes the exam, HR will draft a PAF to add bilingual compensation to their ADP profile effective the beginning of the pay period following the exam date.
- B. Re-Testing
- C. Employees and/or candidates who fail the bilingual examination may re-test after six (6) months or may apply for a position that does not require bilingual skills following the policy HR206 as it relates to transfers or promotions. 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.~~VIII. REFERENCES:

- A. Cultural & Linguistic Program Description

~~VIII.~~IX. DISTRIBUTION:

- A. PowerDMS

~~IX.~~X. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

~~X.~~XI. REVISION DATES: 10/25/2007, 03/28/2013, 06/01/2018, 12/04/2020, 02/16/2024, 02/21/2025, 04/23/2026

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			☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2004		Next Review Date: 04/23/2027 Last Review Date: 04/23/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 05/06/2026	

I. RELATED POLICIES:

A. [HR206](#)

II. IMPACTED DEPTS:

A. All departments

III. DEFINITIONS:

A. Member Facing Department: Behavioral Health, Care Coordination, Enhanced Health Services, Grievance and Appeals, Health Equity, Member Services, Population Health, Transportation, and Utilization Management

B. Threshold languages: Punjabi, Russian, Spanish, and Tagalog

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 in one or more of the threshold languages will be tested as outlined below:
 - a. Pre-employment Bilingual Testing
 1. 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.
 2. 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.
 3. The exam rating Partnership will consider as passing is Advanced Low or higher.
 4. 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.
 5. 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

Policy/Procedure Number: HR509		Lead Department: Human Resources	
Policy/Procedure Title: Bilingual Standards		☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2004		Next Review Date: 04/23/2027 Last Review Date: 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

and the position is not being offered.

6. 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. Bilingual Testing for Existing Employees

1. A manager must submit a request to Human Resources to administer the bilingual examination
2. HR will confirm that the job description references a bilingual skill preference.
3. HR will reach out to the employee and management team to schedule the test.
4. Once HR receives the results, the employee and the department leadership will be notified of the outcome and whether or not the employee passed the exam.
5. If the employee passes the exam, HR will draft a PAF to add bilingual compensation to their ADP profile effective the beginning of the pay period following the exam date.

B. Re-Testing

1. Employees and/or candidates who fail the bilingual examination may re-test after six (6) months or may apply for a position that does not require bilingual skills following the policy HR206 as it relates to transfers or promotions.

C. 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, 02/21/2025, 04/02/2025, 04/23/2026

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			☐ External Policy ☐ Internal Policy	
Original Date: 06/26/2009		Next Review Date: 07/17/2026 06/12/2027 Last Review Date: 07/17/2025 06/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☒ OPERATIONS	☒ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ 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

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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

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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.

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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 rehired 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. Occurrence points may apply to partial time off when PSL is not used as defined in section A.
 - 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

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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

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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, 07/17/2025 (review only, no revisions), 06/12/2026

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR511			Lead Department: Human Resources	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☒ OPERATIONS	☒ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 06/25/2026	

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.
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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 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, 07/17/2025 (review only, no revisions), 06/12/2026

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR512			Lead Department: Human Resources		
Policy/Procedure Title: Mileage Reimbursement			☐ External Policy ☒ Internal Policy		
Original Date: 03/11/2013		Next Review Date: 07/17/2026 06/17/2027 Last Review Date: 07/17/2025 06/17/2026			
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC		
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT	
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC	
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ 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 Partnership** 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. **Full-Time in Office and Part Time Remote (hybrid):** 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.
 1. 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)
- C. **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.
 1. Example 1: Employee lives 31 miles from central worksite, employee will be reimbursed for one mile.
 2. 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		☐ External Policy ☒ Internal Policy	
Original Date: 03/11/2013		Next Review Date: 07/17/2026 06/17/2027 Last Review Date: 07/17/2025 06/17/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- D. **Out of State Employees or those more than ~~300~~200 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.
- E. **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.
1. 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.
 2. 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.
 - a. Outside of normal business hours (lunch, weekends)
 - b. Voluntary
 - c. Not job related
 - d. No other work concurrently performed
 - e. See table below on what events are considered reimbursable/non reimbursable:

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

- F. If attending a business meeting and you leave from the central worksite, record mileage from the central worksite to meeting location.
- G. 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.
- H. All employees must use the mileage app in Concur to calculate mileage. If traveling from home to airport or off-site location to attend a business meeting for company business, deduct your usual mileage from home to work and record any remaining mileage to the destination airport.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
PowerDMS

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

IX. REVISION DATES: 03/23/2018, 06/07/2020, 05/07/2024, 07/17/2025 (review only, no revisions), 07/17/2026

PREVIOUSLY APPLIED TO: N/A

Policy/Procedure Number: HR512		Lead Department: Human Resources	
Policy/Procedure Title: Mileage Reimbursement		☐ External Policy ☒ Internal Policy	
Original Date: 03/11/2013		Next Review Date: 07/17/2026 06/17/2027 Last Review Date: 07/17/2025 06/17/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR512			Lead Department: Human Resources	
Policy/Procedure Title: Mileage Reimbursement			☐ External Policy ☒ Internal Policy	
Original Date: 03/11/2013		Next Review Date: 06/17/2027 Last Review Date: 06/17/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date 06/30/2026	

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, Partnership 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).
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- C. **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.
 1. Example 1: Employee lives 31 miles from central worksite, employee will be reimbursed for one mile.
 2. 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		☐ External Policy ☒ Internal Policy	
Original Date: 03/11/2013		Next Review Date: 06/17/2027 Last Review Date: 06/17/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- D. **Out of State Employees or those more than 200 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.
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 2. 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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Department Meetings	Craft Fair
	Halloween
	Pictures with Santa
	Ice Cream Social

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- H. All employees must use the mileage app in Concur to calculate mileage. If traveling from home to airport or off-site location to attend a business meeting for company business, deduct your usual mileage from home to work and record any remaining mileage to the destination.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
PowerDMS

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

IX. REVISION DATES: 03/23/2018, 06/07/2020, 05/07/2024, 07/17/2025 (review only, no revisions)

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			☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 08/05/2025 06/12/2027 Last Review Date: 08/05/2024 06/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ 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.)

Policy/Procedure Number: HR515		Lead Department: Human Resources	
Policy/Procedure Title: Relocation & Moving Expenses		☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 08/05/2025 06/12/2027 Last Review Date: 08/05/2024 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 \$~~105~~,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~~

Policy/Procedure Number: HR515		Lead Department: Human Resources	
Policy/Procedure Title: Relocation & Moving Expenses		☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 08/05/202506/12/2027 Last Review Date: 08/05/202406/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

~~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, 06/12/2026

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			☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 06/30/2026	

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

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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.)

Policy/Procedure Number: HR515		Lead Department: Human Resources	
Policy/Procedure Title: Relocation & Moving Expenses		☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 Partnership'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.
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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 \$10,000.00. 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 Human Resources and CEO.
 2. All reimbursable expenses must be properly documented with receipts/third party invoices, bills, or statements detailing the expenses.

VII. REFERENCES:

- A. IRS Publication 521

Policy/Procedure Number: HR515		Lead Department: Human Resources	
Policy/Procedure Title: Relocation & Moving Expenses		☐ External Policy ☒ Internal Policy	
Original Date: 06/01/2015		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:

03/23/2018, 06/12/2026

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			☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: <u>08/07/2025</u> Last Review Date: <u>08/07/2024</u>		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ CREDENTIALING	☐ IQI	☐ P & T	☐ QUAC
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: <i>Sonia Rios</i>			Approval Date: <u>08/08/2024</u>	

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		☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: 08/07/2025 Last Review Date: 08/07/2024	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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.

B.C. Employees who are eligible for the Management Incentive Program are not eligible for other bonus award types (e.g. Longevity Bonus Awards).

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:** Top-level goals and high level deliverables are finalized by the Executive

Policy/Procedure Number: HR605		Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program		☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: 08/07/2025 Last Review Date: 08/07/2024	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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.

- 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, 05/26/2026

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR605			Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program			☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: 05/26/2027 Last Review Date: 05/26/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ CREDENTIALING	☐ IQI	☐ P & T	☐ QUAC
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 06/16/2026	

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		☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: 05/26/2027 Last Review Date: 05/26/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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.
- C. Employees who are eligible for the Management Incentive Program are not eligible for other bonus award types (e.g. Longevity Bonus Awards).

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:** Top-level goals and high level deliverables are finalized by the Executive

Policy/Procedure Number: HR605		Lead Department: Human Resources	
Policy/Procedure Title: Management Incentive Program		☐ External Policy ☒ Internal Policy	
Original Date: April 16, 2002		Next Review Date: 05/26/2027 Last Review Date: 05/26/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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.

- 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, 05/26/2026

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR608			Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition			☐ External Policy ☒ Internal Policy	
Original Date: August 4, 2003		Next Review Date: 03/19/2026 <u>02/11/2027</u> Last Review Date: 03/19/2025 <u>02/11/2026</u>		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: <u>03/31/2025</u>	

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](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) recognizes exceptional performance by awarding one Employee of the Quarter (EoQ) per region and one Employee of the Year (EoY) across the organization. These awards honor employees who demonstrate outstanding performance and uphold Partnership's 'Working Together Value Statement.'

VI. POLICY / PROCEDURE:

A. Employee of the Quarter Nomination Guidelines:

1. All employees who have been employed for the entire quarter are eligible for nomination, with the exception of supervisors and above.
2. All employees are eligible to submit nominations.
3. Nominations are not restricted to employees within the nominator's department;
4. After reviewing the criteria for Employee of the Quarter, complete and submit the nomination form (attachment A);
5. Human Resources (HR) will review the nominations and submit them to the department head for review.
6. Once the department head has reviewed the nomination form(s), the nomination form(s) will go to the Partnership's Executive team for final vote by secret ballot.
7. The Employee of the Quarter winner will be announced on Partnership's intranet;
8. The employee selected for "Employee of the Quarter" will receive \$500.00, two (2) spot bonus hours added to their ADP profile, a plaque, a placard for the Employee of the Quarter parking space and will automatically be entered into the running for Employee of the Year.
9. All nominees, with the exception of the winner, will receive their nomination form via email.

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		☐ External Policy ☒ Internal Policy	
Original Date: August 4, 2003		Next Review Date: 03/19/2026 <u>02/11/2027</u> Last Review Date: 03/19/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

B. Employee of the Quarter Criteria:

1. Nominee has practiced the “Working Together Value Statement;”
2. Nominee has excelled in areas beyond their job duties;
3. Nominee shows dedication, creativity, is a team player, and a problem solver;
4. Nominee has an excellent attendance record for the quarter;

C. 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. If any of the eight employees automatically in the running for Employee of the Year (EoY) receive a title change to supervisor or above, they will be removed from consideration and deemed ineligible for EoY, in accordance with criteria outlined in section A.1.
3. Department leadership of the Employee of the Quarters will have an opportunity to provide additional information to the nominee’s form
4. A list of the nominees, along with a summary from their announcement, will be sent out to all staff to vote.
5. The staff survey will represent one (1) vote towards the top nominee.
6. The nominees will then go to the Executive team for final vote by secret ballot and the winner will be chosen.
7. The employee elected for “Employee of the Year” will receive ~~\$1,0500.00~~, 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, 03/19/2025,02/11/2026

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR608			Lead Department: Human Resources		
Policy/Procedure Title: Employee Recognition			☐ External Policy ☒ Internal Policy		
Original Date: August 4, 2003			Next Review Date: 02/11/2027 Last Review Date: 02/11/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC		
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT	
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC	
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER		
Approval Signature: Sonja Bjork			Approval Date: 04/30/2026		

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](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) recognizes exceptional performance by awarding one Employee of the Quarter (EoQ) per region and one Employee of the Year (EoY) across the organization. These awards honor employees who demonstrate outstanding performance and uphold Partnership's 'Working Together Value Statement.'

VI. POLICY / PROCEDURE:

A. Employee of the Quarter Nomination Guidelines:

1. All employees who have been employed for the entire quarter are eligible for nomination, with the exception of supervisors and above.
2. All employees are eligible to submit nominations.
3. Nominations are not restricted to employees within the nominator's department;
4. After reviewing the criteria for Employee of the Quarter, complete and submit the nomination form (attachment A);
5. Human Resources (HR) will review the nominations and submit them to the department head for review.
6. Once the department head has reviewed the nomination form(s), the nomination form(s) will go to the Partnership's Executive team for final vote by secret ballot.
7. The Employee of the Quarter winner will be announced on Partnership's intranet;
8. The employee selected for "Employee of the Quarter" will receive \$500.00, two (2) spot bonus hours added to their ADP profile, a plaque, a placard for the Employee of the Quarter parking space and will automatically be entered into the running for Employee of the Year.
9. All nominees, with the exception of the winner, will receive their nomination form via email.

Policy/Procedure Number: HR608		Lead Department: Human Resources	
Policy/Procedure Title: Employee Recognition		☐ External Policy ☒ Internal Policy	
Original Date: August 4, 2003		Next Review Date: 02/11/2027 Last Review Date: 02/11/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

B. Employee of the Quarter Criteria:

1. Nominee has practiced the “Working Together Value Statement;”
2. Nominee has excelled in areas beyond their job duties;
3. Nominee shows dedication, creativity, is a team player, and a problem solver;
4. Nominee has an excellent attendance record for the quarter;

C. 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. If any of the eight employees automatically in the running for Employee of the Year (EoY) receive a title change to supervisor or above, they will be removed from consideration and deemed ineligible for EoY, in accordance with criteria outlined in section A.1.
3. Department leadership of the Employee of the Quarters will have an opportunity to provide additional information to the nominee’s form
4. A list of the nominees, along with a summary from their announcement, will be sent out to all staff to vote.
5. The staff survey will represent one (1) vote towards the top nominee.
6. The nominees will then go to the Executive team for final vote by secret ballot and the winner will be chosen.
7. The employee elected for “Employee of the Year” will receive \$1,000.00, 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, 03/19/2025, 02/11/2026

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		☐ External Policy ☒ Internal Policy	
Original Date: November 12, 2003		Next Review Date: 01/14/2027 04/23/2027 Last Review Date: 01/14/2026 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE ☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE ☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork		Approval Date: 01/14/2026	

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 hours ÷ 40 hours = ½ x 8 hours = 4 hours
30 hours	30 hours ÷ 40 hours = ¾ x 8 hours = 6 hours

2. Specific departments or units in the organization must operate on holidays. In those particular departments, if a holiday falls on the employee's regular scheduled workday, the employee is expected to work their regular scheduled hours.
3. A non-exempt employee scheduled to work on a holiday may request the day off using the designated code in ADP, or may request another regular day off within the same pay period to make up for the worked paid holiday. Department leadership will review/approve the request based upon business needs. If an employee's time off request for a holiday is approved, they will receive only holiday pay for that day.

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		☐ External Policy ☒ Internal Policy	
Original Date: November 12, 2003		Next Review Date: <u>01/14/2027</u> <u>04/23/2027</u> Last Review Date: <u>01/14/2026</u> <u>04/23/2026</u>	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

4. 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.
5. 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.
6. 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.
7. 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.
8. Part-time employees are eligible for pro-rated holiday pay based on their scheduled hours.
9. If an employee has any paid hours during the pay period they will be eligible to receive holiday pay.
10. Employees who have unpaid time off for the entire pay period are not eligible for holidays or holiday pay that falls during their time off.

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. ~~Cesar Chavez Day~~Farmworkers Day
 - e. Memorial Day
 - f. Juneteenth National Independence Day
 - g. Independence Day
 - h. Labor Day
 - i. Veterans Day
 - j. Thanksgiving Day
 - k. Day after Thanksgiving
 - l. Christmas Eve

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		☐ External Policy ☒ Internal Policy	
Original Date: November 12, 2003		Next Review Date: 01/14/2027 04/23/2027 Last Review Date: 01/14/2026 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

m. 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, 01/14/2026, 04/23/2026

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR610			Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay			☐ External Policy ☒ Internal Policy	
Original Date: November 12, 2003		Next Review Date: 04/23/2027 Last Review Date: 04/23/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 04/23/2026	

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 hours ÷ 40 hours = ½ x 8 hours = 4 hours
30 hours	30 hours ÷ 40 hours = ¾ x 8 hours = 6 hours

2. Specific departments or units in the organization must operate on holidays. In those particular departments, if a holiday falls on the employee's regular scheduled workday, the employee is expected to work their regular scheduled hours.
3. A non-exempt employee scheduled to work on a holiday may request the day off using the designated code in ADP, or may request another regular day off within the same pay period to make up for the worked paid holiday. Department leadership will review/approve the request based upon business needs. If an employee's time off request for a holiday is approved, they will receive only holiday pay for that day.

Policy/Procedure Number: HR610		Lead Department: Human Resources	
Policy/Procedure Title: Holiday Pay		☐ External Policy ☒ Internal Policy	
Original Date: November 12, 2003		Next Review Date: 04/23/2027 Last Review Date: 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

4. 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.
 5. 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.
 6. 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.
 7. 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.
 8. Part-time employees are eligible for pro-rated holiday pay based on their scheduled hours.
 9. If an employee has any paid hours during the pay period they will be eligible to receive holiday pay.
 10. Employees who have unpaid time off for the entire pay period are not eligible for holidays or holiday pay that falls during their time off.
- 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. Farmworkers Day
 - e. Memorial Day
 - f. Juneteenth National Independence Day
 - g. Independence Day
 - h. Labor Day
 - i. Veterans Day
 - j. Thanksgiving Day
 - k. Day after Thanksgiving
 - l. Christmas Eve

Policy/Procedure Number: HR610		Lead Department: Human Resources	
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Original Date: November 12, 2003		Next Review Date: 04/23/2027 Last Review Date: 04/23/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

m. 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, 01/14/2026, 04/23/2026

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR611			Lead Department: Human Resources	
Policy/Procedure Title: Staff Events			☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018		Next Review Date: 07/23/2026 06/02/2027 Last Review Date: 07/23/2025 06/02/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☒ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 07/19/2022	

I. RELATED POLICIES:

A. ADM-19

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

- A. [Request Form](#)
- B. [Teambuilding Guidance](#)
- C. [Event Set-Up Guidance](#)

V. PURPOSE:

To provide all PHC staff with practical policy guidelines that are aligned with PHC's reimbursement policy. This policy focuses on the following areas: Employee Engagement Events, Staff Retirements, Staff Social Events, Staff Recognition, and Departmental Employee Engagement Activities.

VI. POLICY / PROCEDURE:

The following principles form the basis for decisions with respect to staff events, recognition and gifts:

A. Organizational Employee Engagement Events

PHC hosts the following company-wide engagement events each year: Annual Party, and Employee Picnic, and two Staff Appreciation Luncheons.

1. The amount allocated to each staff event is determined annually through the Administrative expense budget. The amount covers the total expenses for the events and is reviewed annually. In the case of the end-of-year party, staff members may be asked to contribute an additional fee to off-set costs that exceed the organization's budget.
2. Staff in remote locations, who cannot attend a localized event, may get together and have a lunch or other appropriate event. Prior written approval must be obtained from HR and the cost should not exceed the current fiscal year's maximum as set out by HR.
3. Extenuating circumstances may warrant exceptions be approved by the CEO or designee.

Policy/Procedure Number: HR611		Lead Department: Human Resources	
Policy/Procedure Title: Staff Events		☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018	Next Review Date: 07/23/2026 06/02/2027 Last Review Date: 07/23/2025 06/02/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

B. Staff Retirement

1. Employees who have expressed their reason for separation as retirement with Partnership and have provided at least one (1) year of uninterrupted service to Partnership will be recognized by way of a plaque.
- ~~1. PHC will recognize those who have expressed their retirement with PHC and are either at the normal retirement age and/or have provided at least 10 years of uninterrupted service to PHC will be recognized by way of a plaque.~~
- ~~2. PHC will recognize retiree's contributions and reinforce/promote positive behaviors and performance that supports PHC's values, goals and objectives by way of a plaque.~~

C. Staff Social Events

1. PHC will not fund staff social events. Any staff celebrations are funded solely through internal fundraising events and staff contributions.
2. These staff social events may be held without charge in PHC rooms subject to availability and staff may contribute food and beverages at their own expense.
3. Staff Social Events are held on staff members' personal time.

D. Departmental Employee Engagement Activities

1. PHC will only fund Departmental Employee Engagement Activities at the CEO's discretion.
2. PHC-funded employee engagement activities are only allowable during normal business hours upon CEO approval, and any expenses must be approved by submission of the request form at least 30 days prior to event date. Any events held outside of normal business hours will be considered a staff social event and expenses will be assumed by staff and/or department management.

E. Staff Gifts

1. There are situations where PHC may extend a gift to an employee. Some examples of situations include sending flowers while the staff member is in recovery from sickness, hospitalization, or bereavement
2. Coordination of gifts must be arranged through HR.
3. Staff gifts will not exceed the amount of \$75, inclusive of taxes and delivery charges.

F. Alcohol

1. No alcohol will be provided at PHC sponsored events that are held during work hours.
2. If alcoholic beverages are served as part of an after-hours event, such as during a dinner for the Board, then the decision to serve alcohol should have the appropriate approval from the CEO. In these instances, staff will be expected to personally assume the cost of purchasing alcoholic beverages.
3. Moderation must be exercised at all times. Employees must promote awareness of personal safety and security with other employees and their guests consistent with the values of the organization and the code of conduct. Care must be taken when planning, managing and/or supervising an event where alcohol is served.

G. Exceptions

1. It is recognized that there could be situations that may deviate from this policy. In those situations, supporting rationale and the request form must be submitted to HR for CEO approval.

Policy/Procedure Number: HR611		Lead Department: Human Resources	
Policy/Procedure Title: Staff Events		☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018	Next Review Date: 07/23/2026 <u>06/02/2027</u> Last Review Date: 07/23/2025 <u>06/02/2026</u>		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

H. Violations

1. Failure to adhere to this policy will result in a denial of the expense claim.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 07/23/2025 (review only, no revisions), 06/02/2026

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR611			Lead Department: Human Resources	
Policy/Procedure Title: Staff Events			☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018		Next Review Date: 06/02/2027 Last Review Date: 06/02/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☒ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: <i>Sonja Bjork</i>			Approval Date: 06/16/2026	

I. RELATED POLICIES:

A. ADM-19

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

- A. [Request Form](#)
- B. [Teambuilding Guidance](#)
- C. [Event Set-Up Guidance](#)

V. PURPOSE:

To provide all Partnership staff with practical policy guidelines that are aligned with Partnership's reimbursement policy. This policy focuses on the following areas: Employee Engagement Events, Staff Retirements, Staff Social Events, Staff Recognition, and Departmental Employee Engagement Activities.

VI. POLICY / PROCEDURE:

The following principles form the basis for decisions with respect to staff events, recognition and gifts:

A. Organizational Employee Engagement Events

Partnership hosts the following company-wide engagement events each year: End of the year Annual Party, Summer Celebration, and two Staff Appreciation Luncheons.

1. The amount allocated to each staff event is determined annually through the Administrative expense budget. The amount covers the total expenses for the events and is reviewed annually. In the case of the end-of-year party, staff members may be asked to contribute an additional fee to off-set costs that exceed the organization's budget.
2. Staff in remote locations, who cannot attend a localized event, may get together and have a lunch or other appropriate event. Prior written approval must be obtained from HR and the cost should not exceed the current fiscal year's maximum as set out by HR.
3. Extenuating circumstances may warrant exceptions be approved by the CEO or designee.

Policy/Procedure Number: HR611		Lead Department: Human Resources	
Policy/Procedure Title: Staff Events		☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018		Next Review Date: 06/02/2027 Last Review Date: 06/02/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

B. Staff Retirement

1. Employees who have expressed their reason for separation as retirement with Partnership and have provided at least one (1) year of uninterrupted service to Partnership will be recognized by way of a plaque.

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3. Staff Social Events are held on staff members' personal time.

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1. There are situations where Partnership may extend a gift to an employee. Some examples of situations include sending flowers while the staff member is in recovery from sickness, hospitalization, or bereavement
2. Coordination of gifts must be arranged through HR.
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1. No alcohol will be provided at Partnership sponsored events that are held during work hours.
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3. Moderation must be exercised at all times. Employees must promote awareness of personal safety and security with other employees and their guests consistent with the values of the organization and the code of conduct. Care must be taken when planning, managing and/or supervising an event where alcohol is served.

G. Exceptions

1. It is recognized that there could be situations that may deviate from this policy. In those situations, supporting rationale and the request form must be submitted to HR for CEO approval.

H. Violations

1. Failure to adhere to this policy will result in a denial of the expense claim.

VII. REFERENCES:

\\jupiter.partnershiphp.int\HR\$\Personnel Committee\2026\5 - Policies with Changes\HR611 - Staff Events.docx

Policy/Procedure Number: HR611		Lead Department: Human Resources	
Policy/Procedure Title: Staff Events		☐ External Policy ☐ Internal Policy	
Original Date: 10/01/2018		Next Review Date: 06/02/2027 Last Review Date: 06/02/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 07/23/2025 (review only, no revisions), 06/02/2026

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			☐ External Policy	
			☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: <u>01/01/2025</u> <u>01/01/2027</u> Last Review Date: <u>01/01/2024</u> <u>01/01/2026</u>		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: <i>Sonja Bjork</i>			Approval Date: <u>01/01/2024</u>	

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~~ at 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		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/01/2027 01/01/2025 Last Review Date: 01/01/2024 01/01/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 ([PHCPartnership](#)) 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.

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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Original Date: May 6, 1996		Next Review Date: 01/01/2027 01/01/2025 Last Review Date: 01/01/2024 01/01/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- c. If you take intermittent or reduced-schedule leave for planned medical treatment, Partnership 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, Partnership 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~~ 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. Partnership 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. Partnership 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 Partnership 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, Partnership 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, Partnership 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 Partnership 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.

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- b. You must notify Partnership 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 Partnership 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, Partnership 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 Partnership PHC for the cost of health benefit premiums.

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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Original Date: May 6, 1996		Next Review Date: 01/01/2027 01/01/2025 Last Review Date: 01/01/2024 01/01/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- c. If you have exhausted your right to PDL and still need time off, you may request leave as an ~~an~~ accommodation. Leave provided as an ~~an~~ accommodation does not entitle you to the same rights and benefits as PDL; for example, your eligibility for Partnership -paid health benefits will cease the first of the month immediately following the completion of one month of leave from -the start date of your leave as an accommodation. In that situation, you must pay the full premiums through COBRA to continue your benefits. You will receive notice directly from Partnership'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 immediately following the completion of one month of leave from the start date of your leave as an accommodation.
- d. Anytime you are not using accrued paid time off during leave as an accommodation, you will stop accruing paid time off.
- e.

- b. ~~If you aren't using accrued paid time off during PDL, you will stop accruing paid time off.~~

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Policy/Procedure Title: Family and Medical Leave; Pregnancy Disability Leave, Reasonable Accommodation, and Transfer; Personal Medical Leave; and Service Member Leave		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/01/2027 01/01/2025 Last Review Date: 01/01/2024 01/01/2026	
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e.f. Contact Human Resources if you have any questions about other [Partnership 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~~ [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~~ [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 [Partnership 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, [Partnership PHC](#)-approved leave immediately following your PDL, your right to reinstatement will be determined by [Partnership 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 [Partnership PHC](#)-paid health benefits will cease the first of the month [immediately following the completion of one month of leave from](#) the PML start date. You must pay the full premiums to continue your benefits. You will receive notice directly from [Partnership’s 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~~ [immediately following the completion of one month](#)

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of leave from the PML start date.

- c. Anytime you are not using accrued paid time off during PML, you will stop accruing paid time off.

4. Returning to Work

- a. You must notify Partnership ~~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, Partnership ~~PHC~~ may require you to provide a copy of the covered service member’s active-duty orders or other documentation. Partnership ~~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 Partnership ~~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

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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

Returning to Work

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.

If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.

Service Member Family and Medical Leave

Eligibility

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.

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).

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:

Up to 12 weeks of leave in a 12-month period for a "qualifying exigency"; or

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.

Requesting Leave

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.

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.

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.

Please contact Human Resources for any questions about this policy.

REFERENCES:

N/A

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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DISTRIBUTION:

PowerDMS

POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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, 01/01/2026

PREVIOUSLY APPLIED TO:

N/A

Policy/Procedure Number: HR703		Lead Department: Human Resources	
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~~4.1. Returning to Work~~

~~5.1. 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.~~

~~6.1. If appropriate, a release to return to work will be required from your provider if the leave is for your own serious illness.~~

~~7.1. Service Member Family and Medical Leave~~

~~8.1. Eligibility~~

~~9.1. 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~~

~~10.1. "Family and Medical Leave" policy applies to Service Member Leave.~~

~~11.1. 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).~~

~~12.1. 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:~~

~~13.1. Up to 12 weeks of leave in a 12-month period for a "qualifying exigency"; or~~

~~14.1. 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.~~

~~15.1. 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.~~

~~16.1. Requesting Leave~~

~~17.1. 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.~~

~~18.1. 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~~

~~19.1. provide a certification verifying eligibility for leave, or may contact the Department of Defense or an applicable third party for verification purposes.~~

~~20.1. 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.~~

~~21.1. Please contact Human Resources for any questions about this policy.~~

~~22.1.~~

~~23.1. REFERENCES:~~

~~24.1. N/A~~

~~25.1.~~

~~26.1. DISTRIBUTION:~~

~~27.1. PowerDMS~~

~~28.1.~~

~~29.1. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:~~

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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

~~30.1.~~

~~31.1. REVISION DATES:~~

~~32.1. 09/26/2013, 12/31/2013, 07/01/2018, 07/16/2019, 01/31/2021, 06/09/2021, 12/17/2021, 01/01/2023,~~

~~33.1. 06/14/2023, 01/01/2024~~

~~34.1.~~

~~35.1. PREVIOUSLY APPLIED TO:~~

~~36.1. 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			☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/14/2027		
		Last Review Date: 01/14/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: <i>Sonja Bjork</i>			Approval Date: 01/14/2026	

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 at 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

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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 (Partnership) 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, Partnership 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, Partnership 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. Partnership 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. Partnership 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 Partnership, 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, Partnership 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, Partnership 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 Partnership 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 Partnership 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 Partnership, 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, Partnership 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 Partnership for the cost of health benefit premiums.

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		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/14/2027 Last Review Date: 01/14/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- c. If you have exhausted your right to PDL and still need time off, you may request leave as accommodation. Leave provided as accommodation does not entitle you to the same rights and benefits as PDL; for example, your eligibility for Partnership -paid health benefits will cease the first of the month immediately following the completion of one month of leave from the start date of your leave as an accommodation. In that situation, you must pay the full premiums through COBRA to continue your benefits. You will receive notice directly from Partnership'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 immediately following the completion of one month of leave from the start date of your leave as an accommodation.
- d. Anytime you are not using accrued paid time off during leave as an accommodation, you will stop accruing paid time off. Contact Human Resources if you have any questions about other Partnership 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 Partnership 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, Partnership-approved leave immediately following your PDL, your right to reinstatement will be determined by Partnership 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.

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		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/14/2027 Last Review Date: 01/14/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 Partnership-paid health benefits will cease the first of the month immediately following the completion of one month of leave from the PML start date. You must pay the full premiums to continue your benefits. You will receive notice directly from Partnership'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 immediately following the completion of one month of leave from the PML start date.
 - c. Anytime you are not using accrued paid time off during PML, you will stop accruing paid time off.
4. Returning to Work
 - a. You must notify Partnership 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, Partnership may require you to provide a copy of the covered service member's active-duty orders or other documentation. Partnership may

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		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/14/2027 Last Review Date: 01/14/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 Partnership 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, 01/01/2024, 01/14/2026

PREVIOUSLY APPLIED TO:

N/A

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		☐ External Policy ☒ Internal Policy	
Original Date: May 6, 1996		Next Review Date: 01/14/2027 Last Review Date: 01/14/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

1.

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR710			Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave			☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 01/01/2026 06/12/2027 Last Review Date: 01/01/2025 06/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 01/01/2025	

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, parent-in-law, 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:

Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 06/12/2027 01/01/2026 Last Review Date: 01/01/2025 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 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 if an employee or their family member is a victim of violence.
 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

Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 06/12/202701/01/2026 Last Review Date: 01/01/202506/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

notification of the absence.

3. Attendance occurrence points will not be applied to PSL hours.

~~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.

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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, 01/01/2025, 06/12/2026

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			☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 06/25/2026	

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, parent-in-law, 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:

Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 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 if an employee or their family member is a victim of violence.
 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

Policy/Procedure Number: HR710		Lead Department: Human Resources	
Policy/Procedure Title: Paid Sick Leave		☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2018		Next Review Date: 06/12/2027 Last Review Date: 06/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

notification of the absence.

3. Attendance occurrence points will not be applied to PSL hours.
- 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, 01/01/2025, 06/12/2026

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR207			Lead Department: Human Resources	
Policy/Procedure Title: Referral Awards			☐ External Policy ☒ Internal Policy	
Original Date: 05/01/1995		Next Review Date: 07/23/2026 Last Review Date: 07/23/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/19/2023	

I. RELATED POLICIES:

A. [HR202](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

A. [Employee Referral Award Request Form](#)

V. PURPOSE:

To establish guidelines for payment of referral awards to eligible employees for referral of qualified candidates to Partnership HealthPlan of California (Partnership) for hire.

VI. POLICY / PROCEDURE:

- A. It is the policy of Partnership to reward employees who successfully refer qualified external candidates for posted job openings at Partnership. Employees will receive a \$500.00 award under the guidelines established below. On a case-by-case basis, and dependent upon the difficulty in filling a position, the amount of the referral award may be increased with CEO approval.
- B. Partnership expends effort and expense to recruit and retain the finest employees. It is our philosophy that those who work for the company and are successful in our environment are some of the best judges of what is required to be a successful employee with Partnership. Accordingly, we welcome referrals of qualified candidates for open positions from our employees. Below are the following guidelines:
 1. Directors/managers/supervisors may not receive awards for filling a position themselves within their department.
 2. The original application must list the employee requesting the award as the referral source. The application will be verified by Human Resources.
 3. The referral award is paid after the candidate has successfully completed their 90-day introductory period and has received a satisfactory introductory 90-day review.
 4. Potential candidates referred:
 - a. Must not be currently employed or working as contract labor.
 - b. Must currently be listed as an active Partnership employee.
 - c. Must not have been employed by Partnership or worked as contract labor within a twelve (12) month period prior to being referred.
 - d. Must not be on file with Partnership as a previously referred candidate.

Policy/Procedure Number: HR207		Lead Department: Human Resources	
Policy/Procedure Title: Referral Awards		☐ External Policy ☒ Internal Policy	
Original Date: 05/01/1995		Next Review Date: 07/23/2026 Last Review Date: 07/23/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- e. Only one person will be awarded for the referred employee on a first come, first served basis.
5. Award requests must be submitted within six (6) months from referred candidate's date of hire.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:
A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES:
07/27/2007, 09/25/2013, 12/17/2018, 05/04/2020, 07/19/2023, 07/23/2025 (review only, no revisions)

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			☐ External Policy ☒ Internal Policy	
Original Date: 03/08/2004		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
 A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS: N/A

V. PURPOSE:
 To provide guidelines to Partnership HealthPlan of California (Partnership) 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 to the HRHelpDesk for approval by the CEO and CHRO for approval;
2. The employee who is being considered for the working out-of-class assignment should meet all the qualifications of the vacant position;
3. 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;
4. Working out-of- job class assignments will be viewed as a way to encourage growth and reward individuals for taking on greater responsibility;
5. Any employee who qualifies and agrees to take on a working out-of-job class assignment will be compensated based on criteria noted in policy HR508 based on CEO's approval;
6. Working out-of-job class assignments will be approved on a case by case basis to improve the operation and efficiency of Partnership.

B. Partnership 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.

VII. REFERENCES: N/A

Policy/Procedure Number: HR210		Lead Department: Human Resources	
Policy/Procedure Title: Working Out-of-Job Class		☐ External Policy ☒ Internal Policy	
Original Date: 03/08/2004		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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, 12/12/2024, 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR212			Lead Department: Human Resources	
Policy/Procedure Title: Temporary Agency Workers			☐ External Policy ☒ Internal Policy	
Original Date: 03/26/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: <i>Sonja Bjork</i>			Approval Date: 07/18/2026	

I. RELATED POLICIES:

- A. [CMP-10](#)
- B. [FAC-201](#)
- C. [HR202](#)
- D. [HR403](#)
- E. [FAC-306](#)

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

- A. [Request for Temporary Employee Form](#)

V. PURPOSE:

To provide Directors/Managers with appropriate guidelines regarding temporary agency workers.

VI. POLICY / PROCEDURE:

A. Policy:

1. All temporary agency workers are employed by a third-party temporary agency and are not Partnership employees.
2. The duration of an agency worker's assignment depends on the workload and business needs.
3. All temporary agency workers must abide by Partnership policies and procedures.
4. All temporary agency workers must comply with all applicable laws pertaining to employee meal and rest periods and will be relieved of all duty during their meal period. Meal and rest periods are as follows: One 30-minute uninterrupted meal break no later than the end of the employees' fifth hour of work. When a temporary employee works more than 10 hours, a second meal period must be provided no later than the end of the temporary employee's tenth hour of work. Temporary agency employees will also be provided a fifteen (15) minute rest period for each four (4) hours worked and should occur as near as possible to the middle of the work period. Rest periods are paid as time worked.
5. Although employment liability is assumed by the third-party temporary agency per our contract agreement, to the extent permitted by law, agency workers are entitled a safe working environment and the same protections against discrimination, harassment, and retaliation in the workplace as Partnership employees. Directors/Managers are responsible for ensuring that the working

Policy/Procedure Number: HR212		Lead Department: Human Resources	
Policy/Procedure Title: Temporary Agency Workers		☐ External Policy ☒ Internal Policy	
Original Date: 03/26/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

environment for agency workers meets the same standards provided for Partnership employees, except as to certain Partnership benefits, wages, and as provided in this policy.

6. To be considered for permanent hire, temporary agency candidates must complete the set amount of hours, agreed upon by the temporary agency.
7. Temporary agency workers must complete an external application on the Partnership website. The hiring process follows the procedures outlined in policy HR202 and employment is not guaranteed.
8. End of assignment is determined by the department Director/Manager and is communicated to the temporary agency by Human Resources,. The temporary agency will communicate to the worker that their assignment has ended. No prior notice is required.

B. Procedure:

1. If temporary help is needed, the department Director/Manager must initiate a Request for a Temporary Employee form and submit the request to HR. The form is available on the Partnership intranet. Request for a Temporary Employee form approved by CEO.
2. HR consults the third-party temporary agency to find a temporary agency worker to meet the needs of the department workload, unless there is a qualified candidate in the Partnership application system.
3. At the time of service, the temporary agency worker must acknowledge and complete the following:
 - a. Confidentiality Agreement;
 - b. Appearance and Hygiene (refer to policy HR403);
 - c. Facilities Policies FAC-304, FAC-305, FAC-306
 - d. All mandatory Compliance trainings
 - 1) A notice will be sent to Training and Development to launch the required trainings.
 - 2) Trainings should be completed within one (1) week following the assignment start date.
 - 3) Partnership HealthPlan of California requires all temporary agency 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, Diversity, Equity & Inclusion (DEI), Cyber Security Awareness, etc. Mandatory training and other agency requirements are listed with specific due dates on the temporary employee's training plan.
4. All temporary agency workers are assigned a temporary badge for building access. Refer to policy FAC-306 for more information.
5. Temporary agency workers will not be assigned desk keys or any other company property other than the temporary badge. Refer to policy FAC-304 for more information.
6. At the end of the assignment, HR/Recruitment will collect the temporary access badge from the employee. If end of assignment is sudden, the third-party temporary agency must collect the badge from the temporary agency worker and return it to Partnership as well as collect the temporary agency worker's personal items from Partnership.

C. Partnership Sponsored Events, Activities and Meetings:

The following approved list contains events, activities, and meetings that Partnership temporary agency workers are invited to and may attend.

- Town Hall Meetings
- Employee Summer Celebration
- Halloween
- Staff Appreciation Luncheons
- Department Meetings

VII. REFERENCES: N/A

Policy/Procedure Number: HR212		Lead Department: Human Resources	
Policy/Procedure Title: Temporary Agency Workers		☐ External Policy ☒ Internal Policy	
Original Date: 03/26/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

X. REVISION DATES: 07/16/2014, 5/9/2019, 2/15/2023, 12/12/2024, 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR215			Lead Department: Human Resources	
Policy/Procedure Title: Employee Separation and Eligibility for Rehire			☐ External Policy ☒ Internal Policy	
Original Date: 07/01/2019		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 08/09/2025	

I. RELATED POLICIES:

A. [HR202](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

A. [HR Notification Process to RAC for FPPC Filing](#)

V. PURPOSE:

To establish guidelines for employees ending employment with Partnership HealthPlan of California (Partnership).

VI. POLICY / PROCEDURE:

A. Voluntary Notice of Resignation

1. An employee who desires to voluntarily resign from Partnership should submit a formal written notice to their direct supervisor generally at least two weeks in advance of the intended resignation date.
2. The letter should specify the last day of work.
3. The direct supervisor should immediately forward a copy to Human Resources (HR) at HRHelpdesk@partnershiphp.org.
4. All system access will be immediately terminated on the last working day in the office.

B. Involuntary Termination

1. Before any action is taken to involuntarily discharge an employee, the employee's direct supervisor must submit the supporting documentation to HR that substantiates the request.
2. If applicable, the direct supervisor must complete any outstanding performance evaluations.
3. Upon discharge, HR will inventory the personal belongings from the employee's desk. HR will make arrangements with the employee to pick up their personal items. Personal items not retrieved will be discarded after two weeks.
4. All system access will be immediately terminated on the last working day in the office.

C. Death of an Employee

1. Upon receiving notification of the death of an employee, the employee's direct supervisor should

Policy/Procedure Number: HR215		Lead Department: Human Resources	
Policy/Procedure Title: Employee Separation and Eligibility for Rehire		☐ External Policy ☒ Internal Policy	
Original Date: 07/01/2019		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

immediately notify HR.

2. HR will process all appropriate beneficiary payments from the various benefits plans.
3. The employee's direct supervisor should ensure that payroll receives the deceased employee's timecard.
4. Final payment of wages will be processed and paid as required by law after Partnership is provided probate paperwork or proof of trust.

D. Final Pay

1. Although most state law rules regarding final pay do not apply to Partnership as a local public entity, Partnership generally observes these rules where practical to be consistent with expectations of employees from mixed public and private sector backgrounds.
2. Employees who provide more than 72 hours' notice of resignation or are terminated involuntarily will be paid all final pay, including accrued Paid Time Off (PTO), at the time of termination.
3. Employees who resign with less than 72 hours' notice will be paid all their wages, including accrued Paid Time Off (PTO), within 72 hours of resigning.
4. Employees who resign with less than 72 hours' notice may request that their final wage payment be mailed to a designated address in writing to HR. The date of mailing will be considered the date of payment. .
5. Resigning employees also may elect their final wage payment to be paid via direct deposit on the following scheduled pay date. Their election must be made in writing and submitted to HR in advance.
6. Any unused PTO and spot bonus hours will be paid out at termination as a separate check.
7. Catastrophic Leave hours do not have cash value and are not paid out at time of separation.
8. Any unused Paid Sick Leave (PSL) will be forfeited at the end of employment.
9. Expense reimbursement requests should be submitted to Accounts Payable at least two weeks prior to the resignation date. Any requests submitted later should be submitted to HR.
10. Employees will be paid based on the current rate of pay in the system at the time of termination.
11. To be eligible to receive any goal, incentive, and longevity bonuses, the employee must be a current employee at the time normal payout occurs in most cases, and if consistent with the written bonus plan..

E. Health Insurance

Medical, Dental, and Vision insurance coverage terminates on the last day of the month from separation of employment.

F. Return of Partnership Property

1. Employees must return all Partnership property at the time of separation, including badge, keys and laptops. Instructions on returning equipment will be determined and communicated on a case by case basis by HR.

G. Exit Interview

1. Exiting employees may be scheduled for an exit interview with HR. This discussion allows an opportunity to discuss final pay, benefits, reasons for leaving the organization, opinions on work conditions, and relationships with direct supervisors.

H. Status Change Notice

1. On the last date of employment, HR will issue a status change notice to appropriately notify the Executive & Operations teams, Payroll, Facilities, IT, and RAC.

Policy/Procedure Number: HR215		Lead Department: Human Resources	
Policy/Procedure Title: Employee Separation and Eligibility for Rehire		☐ External Policy ☒ Internal Policy	
Original Date: 07/01/2019		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

I. IT Service Desk Ticket

1. HR will notify the department of the exiting employee to submit an “Employee leaving the organization status change request” IT service desk ticket to disable all system access in accordance with policy IT016. The ticket should be submitted after the employee meets with HR and turns in their badge.
2. HR will provide IT a monthly termination report for audit purposes.

J. Eligibility for Rehire

1. Employees who voluntarily resign from Partnership in good standing may be considered for rehire. Former employees must follow the normal application and hiring processes and must meet all minimum qualifications and requirements of the position.
2. Employees rehired after 90 days of separation will not retain previous tenure when calculating longevity, PTO accruals, or any other benefits, unless required by law.
3. Employees rehired within 90 days of separation will retain their original date-of-hire for use in calculating longevity and PTO accruals. They will also have any unused PSL balance from the current calendar year reinstated.
4. All previously held health benefits will be reinstated in accordance with the terms of the actual benefit plan documents in effect at the time of rehire.
5. Employees who are involuntarily terminated by Partnership for cause due to unacceptable performance or policy violations, or who resign in lieu of termination, are ineligible for rehire. In addition, employees who abandon their job will not be considered for rehire, absent extenuating circumstances (such as temporary incapacity).

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 12/09/2019, 05/11/2020, 03/20/2023, 06/27/2025

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR404			Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews			☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

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.
- C. Focal Review: A Focal Review is an annual performance review that captures performance.
- D. Focal Review Period: August 1 – July 31 of each year.

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 may 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 generally conducts performance reviews at the following intervals: Introductory Reviews and Annual Reviews. However, it may conduct performance reviews on other occasions it deems necessary, in its sole discretion. 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.

Policy/Procedure Number: HR404		Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews		☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

A. Introductory Reviews/90-Day Reviews

Employees who are new to the organization, or who have received a promotion, transfer or demotion, will receive an introductory review approximately ninety (90) days into their new position. However, Partnership may extend the introductory review period, or require an employee to undergo an additional review or review(s), if appropriate in the circumstances.

1. The Direct Supervisor will review and discuss the job description and expectations during the introductory review.
2. If Partnership determines the employee's performance is unacceptable or unsatisfactory, then the employee's introductory period may be extended.
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

Partnership conducts performance reviews annually.

1. Regular full-time and part-time employees who have been actively employed in their position ninety (90) days or longer from the focal review period start date will participate in the annual review process.
2. Employees who have been actively employed in their position less than ninety (90) days from the focal review period start date will participate in the annual review process in the following year.
3. Employees on a Partnership approved leave of absence are not actively employed. These employees will participate in the review process upon return from leave, if they have been actively employed in their position for ninety (90) days or longer during the focal review period.
4. Employees who transfer or are promoted but have not been working in the current role for ninety (90) days or longer from the focal review period start date will still participate in the annual review cycle, as described further below.

C. Generally, employees' overall performance score determines 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: Department Chief, CHRO, and CEO.

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

Policy/Procedure Number: HR404		Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews		☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- 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 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. An Organizational Goals and Focus Areas section will be added to Individual Contributor appraisal form to capture contributions or other support to the organizational goals, metrics, mission, vision, and/or values.
 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 generally 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.
 - a. Employees who are promoted or transferred into a new role will be evaluated during the normal annual review cycle. The employee's previous Direct 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, of the previous year). The new Direct Supervisor score will be used to calculate final merit for the entire focal review period. 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 be eligible for 100% of any recommended merit increase.
 - b. Employees who do not complete their self-appraisal tasks by their due dates will be subject to the following:
 - 1) Self-Appraisal moved forward to their Direct Supervisor "as is" at the time of forward.

Policy/Procedure Number: HR404		Lead Department: Human Resources	
Policy/Procedure Title: Performance Reviews		☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- 2) A .5% decrease from their recommended merit score. For example, if an employee is recommended 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, the employee may no longer be eligible for a merit increase in that review cycle, and may be subject to disciplinary action.
- e. Exceptions to these rules may be made by the CEO or CHRO for extenuating circumstances.

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. For an employee on a Partnership approved continuous leave of absence during the regular annual review cycle, the review cycle will commence upon return to work, provided the employee has worked at least ninety (90) days in the review cycle. 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: Human Resources

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, 01/24/2025, 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

**PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE**

Policy/Procedure Number: HR503			Lead Department: Human Resources	
Policy/Procedure Title: Meal and Rest Periods			☐ External Policy ☒ Internal Policy	
Original Date: 11/22/1994		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 08/09/2025	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS: N/A

V. PURPOSE:
To provide Directors/Managers/Supervisors with appropriate guidelines for meal and rest periods.

VI. POLICY / PROCEDURE:

A. General:

1. Partnership HealthPlan of California (Partnership) is a local public entity subject to federal (not state) laws pertaining to employee meal and rest periods. However, Partnership generally offers meal and rest periods as a matter of promoting balance and healthy work habits. Directors/Managers/Supervisors will schedule meal and rest periods to accommodate Company operating requirements. Generally, this means that non-exempt employees will be relieved of all active responsibilities and restrictions during meal periods and will not be compensated during that time.
2. Employees must not be absent from their workstations beyond allotted meal or rest period time.
3. Partnership generally provides meal and rest periods as follows:
 - a. An unpaid meal period when scheduled to work an eight (8) or (9) hour day.
 - b. A fifteen (15) minute rest period for each four (4) hours worked, and should occur as near as possible to the middle of the work period. Rest periods are paid as time worked.
 - c. If an employee receives advance authorization from a supervisor to take a rest break in excess of 20 minutes, the rest break will be unpaid.
 - d. Rest and meal breaks may be waived with authorization from an employee's supervisor when necessary to meet workload or operational needs.

B. Procedure:

1. When possible, take meal breaks and any rest periods in the lunchroom or non-work areas.
2. Return to work stations promptly at end of meal or rest periods.
3. During meal or rest periods, do not interfere with fellow employees who are continuing to work. Avoid strong or excessive food odors as this may interfere with the work flow of employees.
4. Rest periods and meal breaks may not be consolidated.

Policy/Procedure Number: HR503		Lead Department: Human Resources	
Policy/Procedure Title: Meal and Rest Periods		☐ External Policy ☒ Internal Policy	
Original Date: 11/22/1994		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

C. Employee Task Force Lunch Break:

1. Employee Task Force Representatives are allotted a thirty (30) minute unpaid lunch break after each Task Force Meeting.
2. The Task Force Meeting is working time, so the lunch break must be after, not during, the meeting.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

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

X. REVISION DATES:

06/17/1998, 03/03/2010, 11/04/2011, 04/20/2012, 03/28/2013, 05/23/2013, 11/08/2023, 08/09/2025

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			☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: <i>Sonja Bjork</i>			Approval Date: 08/09/2025	

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:

A. [9/80 Scenarios](#)

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. Because Partnership is a local public entity, overtime compensation is paid to all non-exempt employees in accordance with federal (not state) 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 work week. Work weeks may not coincide with calendar weeks and may vary based on alternate schedules (e.g. 9/80 schedules). 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.

Policy/Procedure Number: HR504		Lead Department: Human Resources	
Policy/Procedure Title: Overtime and Shift Differentials		☐ External Policy ☒ Internal Policy	
Original Date: 11/01/1993		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

- 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 differentials are only paid for hours actually worked and will not be applied to use of PTO, PSL, or Spot Bonus hours.
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 scheduled start time, they will not receive the shift differential for that day.

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, 08/09/2025

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			☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

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.
- 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.

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 Partnership4Me). 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 three (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 (3) 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

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 nights or weekend stay overs 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; employees 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, employee 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. Employee 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.),

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 and Rideshare:

- 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.
- e) If using a rideshare service (e.g..Uber or Lyft), employees should select the standard most economical option when possible. Upgrades are only allowed if there is a business need with justification. . It is understood that there may be some extenuating circumstances that could arise that would require deviation from utilizing the most economical option. In these instances, justification must be provided upon return.

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 requires all new hires to complete the Employee Onboarding training.
- b. Partnership 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

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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 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 Pre-Approval:
 - a. Employee must be a regular full-time employee and have completed six (6) months of continuous employment, prior to submitting a request for pre-approval.
 - b. Employee must take a job-related course, relevant to current job responsibilities or planned career progression.
 - c. Courses taken for the purpose of a degree must be taken at a US educational institution that offer degree programs and must be accredited by either the U.S. Department of Education (USDE) or the Council for Higher Education Accreditation (CHEA).
 - d. Courses taken for the purpose of continuing education or college-level transfer credit must be taken at a U.S. based learning provider and must be accepted by a USDE or CHEA accredited institution.
 - e. 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 Approval Form for processing through concur.
 - f. Partnership will reimburse according to policy HR506.
 2. Guidelines for Certification Pre-Approval:
 - a. Employee must be a regular full-time employee and have completed six (6) months of continuous employment, prior to submitting a request for pre-approval.
 - b. Employee must enroll in a job-related certification program, relevant to current job responsibilities or planned career progression.
 - c. Prior to enrollment in a certification program, employee must complete the Tuition/Certification

Policy/Procedure Number: HR514		Lead Department: Human Resources	
Policy/Procedure Title: Employee Growth & Career Development		☐ External Policy ☒ Internal Policy	
Original Date: 08/25/2014		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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.

- d. For each program, 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 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, 04/29/2025, 07/08/2025, 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR517			Lead Department: Human Resources	
Policy/Procedure Title: Disaster/Emergency Compensation			☐ External Policy ☒ Internal Policy	
Original Date: 10/01/2020		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

I. RELATED POLICIES:

A. [HR507](#)

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

Extenuating Circumstances: The majority of employees have been deployed to temporary telework due to a critical situation such as a pandemic.

IV. ATTACHMENTS:

A. N/A

V. PURPOSE:

To establish a compensation plan due to missed work at Partnership HealthPlan of California (Partnership) in the event of a disaster, inclement weather, loss of power, or anything else requiring evacuation or office closure.

VI. POLICY / PROCEDURE:

A. General

1. In the event of fires, Public Safety Power Shutoff (PSPS), or other emergencies that may prohibit employees from working, it is important to set standards for compensation, including considering disaster compensation for extended missed work days as a means of best supporting the staff at Partnership. Because each and every event is different, approval to put disaster compensation into effect for an extended event is at the sole discretion of the Chief Executive Officer or designee.
2. Disaster compensation will only be paid based on normal scheduled work hours and will not apply to employees who were on scheduled Paid Time Off (PTO) or a leave of absence at the time of the event.

Policy/Procedure Number: HR517		Lead Department: Human Resources	
Policy/Procedure Title: Disaster/Emergency Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 10/01/2020		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

B. Scenarios:

In the event of...	Less than full day missed	Full day or more missed	Entire week missed
A disaster, inclement weather, loss of power, or anything else causing evacuation or office closure, and EE is not set up to work from home.	Non-Exempt: hours worked plus ESL, PSL, PTO, LWOP Exempt: Paid normal salary	Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP	PHC will pay 2 days (16 hours) Remaining missed hours: Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP
A disaster, inclement weather, loss of power, or anything else causing teleworker to be unable to work from home, and EE is unable to work in the office due to weather, disaster, or business needs when the office is otherwise open.	Non-Exempt: hours worked plus ESL, PSL, PTO, LWOP Exempt: Paid normal salary	Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP	PHC will pay 2 days (16 hours) Remaining missed hours: Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP
A disaster, inclement weather, loss of power, or anything else causing evacuation or office closure, and teleworker unable to work from home.	Non-Exempt: hours worked plus ESL, PSL, PTO, LWOP Exempt: Paid normal salary	Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP	PHC will pay 2 days (16 hours) Remaining missed hours: Non-Exempt: ESL, PSL, PTO, LWOP Exempt: ESL, PSL, PTO, LWOP
An in-office worker choosing to stay home due to loss of power, weather or disaster, when the office is otherwise open	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO
A teleworker choosing to stay home and not work due to loss of power, weather or disaster, when the office is otherwise open	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO	Non-Exempt: PSL, UPTO Exempt: PSL, UPTO

In Extenuating Circumstances when an employee is unable to work in the office due to social distance spacing HR and management will prioritize who is able to come to the office based on social distance spacing, equipment availability, and business needs. Please reference table above for appropriate timekeeping practice.

Policy/Procedure Number: HR517		Lead Department: Human Resources	
Policy/Procedure Title: Disaster/Emergency Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 10/01/2020		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 11/08/2023, 07/23/2025 (review only, no revisions), 07/15/2026 (review only; no changes)

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PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY / PROCEDURE

Policy/Procedure Number: HR604			Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus			☐ External Policy ☒ Internal Policy	
Original Date: May 1, 1997		Next Review Date: 01/07/2027 Last Review Date: 01/07/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 01/07/2026	

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 spot bonus hours 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. Monetary rewards are used 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. All staff are eligible for one monetary reward per year, however additional monetary rewards may be approved at the discretion of the CEO.
2. Awards typically range from \$100.00 - \$2000.00, final amounts will be approved at the discretion of the CEO.
3. Rewards should not be related to the organizational goals determined by policy HR605.
4. Once the department head has approved, please submit the spot bonus form to HR (HRHelpDesk@partnershiphp.org) for processing.

Policy/Procedure Number: HR604		Lead Department: Human Resources	
Policy/Procedure Title: Spot Bonus		☐ External Policy ☒ Internal Policy	
Original Date: May 1, 1997		Next Review Date: 01/07/2027 Last Review Date: 01/07/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

C. Spot Bonus Hours

1. All staff are eligible excluding Associate Directors and above.
2. Staff may use spot bonus hours after their 90th day of employment.
3. Reward
 - a. Two (2) or four (4) hours off with pay
 - b. Spot bonus hours can be issued year round
 - c. Disbursement – There is not a requirement to give to each employee.
 - d. Each Department Head will receive six (6) spot bonus hours for every one (1) employee in their department to use at their discretion on an annual basis.
 - e. Certificates may be earned for the following:
 - 1) Caught Being Compliant
 - 2) Employee of the Quarter
 - 3) Employee of the Year
 - f. Special Performance Guidelines:
 - 1) Exceptional financial savings
 - 2) Exceptional performance
 - 3) Cost savings event
 - 4) Beyond the call of duty
4. Unused spot bonus hours will be paid out upon separation.
5. Unused Spot Bonus hours in ADP will rollover to the following 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, 10/28/2025

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			☐ External Policy ☒ Internal Policy	
Original Date: 07/18/2003		Next Review Date: 05/21/2027 Last Review Date: 05/21/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☐ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 05/21/2026	

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 CHRO.
2. The amount of the award can vary from year to year.
3. Employees with less than one (1) year of service, temporary, on-call, Supervisors and above, 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 May 31st 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. One (1) year of service 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

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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: CHRO

X. REVISION DATES:

03/22/2011, 4/23/2018, 06/10/2020, 06/21/2023, 08/05/2024, 05/16/2025, 05/21/2026 (review only)

PREVIOUSLY APPLIED TO:

N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR612			Lead Department: Human Resources	
Policy/Procedure Title: Community Service			☐ External Policy ☒ Internal Policy	
Original Date: 04/03/2024		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

I. RELATED POLICIES:

A. HR611

II. IMPACTED DEPTS:

A. All Departments

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

A. [Request Form](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) has established this policy and these procedures to enable employees to volunteer their services in the communities we serve during normal business hours for team building purposes. For the purpose of this policy, volunteerism is considered an outside activity that an employee has chosen to participate in and that benefits the community.

VI. POLICY / PROCEDURE:

- A. Partnership will grant eight (8) hours per calendar year to each full-time employee and four (4) hours per year to each part-time employee if their regularly scheduled hours are 20 or more per week, for the purpose of participating in community service/volunteer activities that meet all of the following criteria:
 1. The volunteer activity is for a community service organization, which is defined as a non-profit, non-partisan community organization designated as an IRS code 501(c)(3) or 501(c)(4) agency.
 2. The volunteer activity is performed as a team to support teambuilding.
 3. The volunteer activity is during Partnerships normal business hours; this is generally Monday-Friday 8am-5pm.
- B. Volunteer time must be requested in advance using the Partnership Event Request Form (attachment A) and have department Director, Human Resources, and Chief approval at least 30 days prior to event date.
- C. After the request form has been approved the employee will be able to submit a request in ADP for the Volunteer Team Building (VTB) hours.
- D. Volunteer time should not conflict with peak work schedules and other work-related responsibilities, create the need for overtime or cause other conflicts. Volunteer time should not exceed the annual amount provided by Partnership.

Policy/Procedure Number: HR612		Lead Department: Human Resources	
Policy/Procedure Title: Community Service		☐ External Policy ☒ Internal Policy	
Original Date: 04/03/2024		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	Healthy Kids	☒ Employees

- E. Interested employees must be meeting or exceeding performance standards. Employees that are on an active performance improvement plan (PIP) or corrective action plan (CAP) are ineligible to participate in community service.
- F. Violations
1. Failure to adhere to this policy will result in future request denials.

Examples of appropriate uses

- Volunteering at a food bank or food pantry
- Volunteering at Habitat for Humanity
- Volunteering at a vaccine clinic
- Volunteering to participate in a beach, park or trail clean-up

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. DEPARTMENT RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 07/24/2025 (review only, no revisions), 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR613			Lead Department: Human Resources	
Policy/Procedure Title: Catering Guidelines			☐ External Policy ☒ Internal Policy	
Original Date: 09/12/2007		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☒ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☒ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

I. RELATED POLICIES:

A. N/A

II. IMPACTED DEPTS:

A. All

III. DEFINITIONS:

A. N/A

IV. ATTACHMENTS:

- A. [Approved Vendor List](#)
- B. [W9 Form](#)
- C. [New Vendor Set-up Form](#)

V. PURPOSE:

To clarify general information and guidelines regarding approved vendors, delivery charges and tax for all Partnership approved catering vendors and placing orders.

VI. POLICY / PROCEDURE:

- A. All Partnership staff will use only approved vendors for catering orders. As a company it is important that we have a business (invoicing) relationship with the vendors used.
 - 1. If you would like to use a caterer not included in the approved vendors list, then you must contact the Administrative Assistant in the Human Resources department to request a new vendor be set up prior to placing any orders with this vendor. The Purchasing Specialist will be backup to the Administrative Assistant in the Human Resource department for this process. You will be required to return a completed new vendor packet to the Administrative Assistant of the Human Resource department before the vendor is added to the vendor list. This packet will consist of a new vendor set-up form and a W-9. Once the vendor has been approved, it will be added to the approved vendors list (attached) and all Administrative Assistants will be notified by email; and when possible, a menu will be attached.
 - 2. The Administrative Assistant in the Human Resources department (or delegate as determined by the Sr. Director of Human Resources acting as back-up) will forward all completed new vendor packets to AP.
 - 3. If a check is necessary for a catering order, please make sure such requires coincides with the

Policy/Procedure Number: HR613		Lead Department: Human Resources	
Policy/Procedure Title: Catering Guidelines		☐ External Policy ☒ Internal Policy	
Original Date: 09/12/2007		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☒ Medi-Cal	☐ Healthy Kids	☒ Employees

Finance Department's Wednesday check run (manual checks are typically for "emergencies only") and are submitted at least two weeks in advanced.

B. General Information:

1. Range for Vendor Charges – Please keep your Departments' budget in mind when placing all food orders. If you are going over the amounts listed below, you will need approval from the Chief Executive Officer.
 - a. Breakfast prices should not exceed \$20.00 a person.
 - b. Lunch prices should not exceed \$30.00 a person.
 - c. Dinner prices should not exceed \$40.00 a person.
 - d. Special Event pricing will be determined on a case-by-case basis.
2. Standard Mileage Reimbursement Rate:
 - a. Catering vendors are permitted to charge the current Internal Revenue Services (IRS) mileage reimbursement rate for deliveries.
3. Delivery / Set-up Charges:
 - a. Catering vendors are permitted to charge a deliver / set-up fee (if reasonable) in lieu of the standard mileage reimbursement rate, but approval is required prior to placing the order.
4. Tips:
 - a. You are authorized to add a 15% tip for reasonably good service to food charges (excludes taxes, delivery charges, and additional miscellaneous service charges when calculating tips) on all catering orders that are delivered to the HealthPlan.
 - b. Please clearly notate the tip and circle the final total with tip accounted for on the invoice.
5. Tax:
 - a. Catering vendors are permitted to charge the standard statewide tax rate plus any additional city or county tax on all orders.

C. How to process a catering order:

- 1) Specify the department to charge and business purpose on the invoice. If the event is Strategic Use of Reserve (SUR) related, please also note the SUR on the invoice.
- 2) Scan invoice and have authorized signer approve via PDF approved stamp with date and time.
- 3) Drop invoice into APWorkflow, follow APWorkflow guidelines.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE:

A. Administrative Assistant to the Human Resources department.

X. REVISION DATES:

10/16/2014, 06/25/2019, 06/19/2024, 07/24/2025 (review only, no revisions), 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO:

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR701			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off (PTO)			☐ External Policy ☒ Internal Policy	
Original Date: 09/01/1994		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 08/09/2025	

I. RELATED POLICIES:

- A. [HR111](#)
- B. [HR702](#)
- C. [HR703](#)
- D. [HR704](#)
- E. [HR704a](#)
- F. [HR706](#)
- 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 an employee's designated PTO "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)		☐ External Policy ☒ Internal Policy	
Original Date: 09/01/1994		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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. Although Partnership is a local public entity and not subject to state laws requiring payout of PTO at termination of employment, as a benefit, terminated employees will receive payment for unused accrued PTO upon separation of employment for any reason.
- I. 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.
- J. Partnership may require a health care provider's certification or other verification on the basis for using unscheduled PTO.
- K. 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)		☐ External Policy ☒ Internal Policy	
Original Date: 09/01/1994		Next Review Date: 08/09/2026 Last Review Date: 08/09/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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, 08/09/2025

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR702			Lead Department: Human Resources	
Policy/Procedure Title: Paid Time Off Cash-Out Program			☐ External Policy ☒ Internal Policy	
Original Date: 11/11/2015		Next Review Date: 07/12/2027 Last Review Date: 07/12/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT
Approving Entities:	☒ BOARD		☐ COMPLIANCE	☒ FINANCE
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ PAC
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

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		☐ External Policy ☒ Internal Policy	
Original Date: 11/11/2015		Next Review Date: 07/12/2027 Last Review Date: 07/12/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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, 07/12/2026 (review only; no changes)

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)			☐ External Policy ☒ Internal Policy	
Original Date: March 15, 2010		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 01/18/2024	

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.

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	
Policy/Procedure Title: 9/80 Workweek (Exempt)		☐ External Policy ☒ Internal Policy	
Original Date: March 15, 2010		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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 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 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)		☐ External Policy ☒ Internal Policy	
Original Date: March 15, 2010		Next Review Date: 01/01/2025 Last Review Date: 01/01/2024	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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 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
 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.

Policy/Procedure Number: HR706a		Lead Department: Human Resources	
Policy/Procedure Title: 9/80 Workweek (Exempt)		☐ External Policy ☒ Internal Policy	
Original Date: March 15, 2010		Next Review Date: 01/01/2024 Last Review Date: 01/01/2022	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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, 07/17/2025 (review only, no revisions)

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)			☐ External Policy ☒ Internal Policy		
Original Date: March 15, 2010		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025			
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC		
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT	
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC	
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ 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)		☐ External Policy ☒ Internal Policy	
Original Date: 03/15/2010		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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:

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Original Date: 03/15/2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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 five (5) days of leave, three (3) of which are paid.
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,

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Policy/Procedure Title: 9/80 Workweek (Non-Exempt)		☐ External Policy ☒ Internal Policy	
Original Date: 03/15/2010		Next Review Date: 02/16/2025 Last Review Date: 02/16/2024	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ 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, 07/17/2025 (review only, no revisions)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY/ PROCEDURE

Policy/Procedure Number: HR712			Lead Department: Human Resources	
Policy/Procedure Title: Other Leaves			☐ External Policy ☒ Internal Policy	
Original Date: 12/03/2020		Next Review Date: 12/03/2026 Last Review Date: 12/03/2025		
Applies to:	☐ Medi-Cal	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO ☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 12/03/2025	

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

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accumulates, and the employee's benefits will continue as required by law.

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

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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.
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.
6. Employees are eligible for time off to vote regardless of their ninety (90) day introductory period.

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.

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- 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.
 - 8) Employees are eligible for time off for Jury Duty regardless of their ninety (90) day introductory period.
- 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, 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. Employees will be required to first apply any accrued PTO available to them, up to a maximum of five days for bone marrow donation and up to a maximum of two weeks for organ donation. Any remaining time off after using PTO, if applicable, will be paid at the base rate. An employee taking leave for organ donation who has exhausted this paid leave may take up to 30 additional days of unpaid time off if needed.
- 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

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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 reproductive loss 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.
 - 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 Violence**
- 1) If you or your family member (child, parent, grandparent, grandchild, sibling, spouse, domestic partner, or designated person who is a blood relation or the equivalent of a family member) are a victim of violence (including domestic violence, sexual assault, stalking, bodily injury or death, use or threat of a weapon against you), you may be eligible to take time off for specified purposes.
 - 2) Eligible reasons for leave include time off to:
 - a) To appear in court to comply with a subpoena or other court order as a witness in any judicial proceeding;
 - b) Seek legal relief such as a temporary or permanent restraining order, or other injunctive relief to help ensure the health, safety, or welfare of you or your family member;
 - c) Prepare for (including seeking legal services), participate in, or attend other relevant legal proceedings;
 - d) Seek medical attention for your own or your family member's injuries, recover from your injuries, or to care for your injured family member;
 - e) Obtain services for you or your family member from a domestic violence shelter, program, rape crisis center, or victim services organization or agency;
 - f) Obtain psychological counseling or mental health services for you or your family member;
 - g) Participate in safety planning and take other actions to increase safety from future violence;
 - h) Relocate and/or secure new housing (permanent or temporary), including enrolling children in a new school or childcare; or
 - i) Seek, obtain, or provide childcare or care to a dependent adult when necessary to ensure the safety of the child or dependent adult from violence.
 - 3) If you are the victim of violence, leave generally will be limited to a cumulative total of 12 weeks, unless otherwise required by law. If you are taking leave to assist or care for a surviving family member who is a victim of violence, leave is limited to a total of ten days. Leave to assist a surviving family member for the purpose of relocation, securing housing, or enrolling children in school or childcare is limited to five days (and will count toward the

Policy/Procedure Number: HR712		Lead Department: Human Resources
Policy/Procedure Title: Other Leaves		☐ External Policy ☒ Internal Policy
Original Date: 12/03/2020	Next Review Date: 12/03/2026 Last Review Date: 12/03/2025	

maximum total of ten days). If you are requesting leave on behalf of a designated person, please identify the designated person when you make your request. You generally may choose only one designated person in any 12-month period.

- 4) If you need time off for a scheduled proceeding or meeting, please consult with us as far in advance as possible so we can do our best to coordinate schedules. We may request certification of the need for leave or accommodation, such as police report, court order, documentation of treatment or aid, or a signed written statement.
 - 5) Partnership also will provide a reasonable accommodation for ensuring your 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. Partnership may require certification regarding the need for accommodation.
 - 6) 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 or requested an accommodation 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.
 - 7) Employees may use PTO and/or sick leave for any absence under this policy. Otherwise, the time off will be unpaid.
 - 8) When you take time off under this policy, it will run concurrently (i.e., at the same time) as other applicable leaves of absence for which you are eligible, unless otherwise required by law. 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 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.

Policy/Procedure Number: HR712		Lead Department: Human Resources
Policy/Procedure Title: Other Leaves		☐ External Policy ☒ Internal Policy
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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, 07/29/2025, 12/03/2025

PREVIOUSLY APPLIED TO:

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR803			Lead Department: Human Resources		
Policy/Procedure Title: Workers' Compensation			☐ External Policy ☒ Internal Policy		
Original Date: 10/01/1994			Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC		
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☒ DEPARTMENT	
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC	
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER	
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026		

I. RELATED POLICIES:

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

II. IMPACTED DEPTS:

- A. All departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:

- A. [Employee Report of Injury Packet](#)

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 direct report is unavailable, contact any available department Manager/Director). 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 direct report and Human Resources as soon as possible.
 - b. Complete the "Employee's Accident Report" and return to HRHelpdesk@partnershiphp.org (Attachment A).
 - c. 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	
Policy/Procedure Title: Workers' Compensation		☐ External Policy ☒ Internal Policy	
Original Date: 10/01/1994		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

2. Department Supervisor/Manager/Director
 - 1) Report employee work-related injury/illness immediately to Human Resources.
 - 2) Complete the "Supervisor Report on Employee Accident" (Attachment A) and return to HRHelpdesk@partnershiphp.org.
3. Human Resources
 - a. Provide employee the "Employee's Claim for Workers' Compensation Benefits" (DWC1) form within 24 hours from DATE EMPLOYER FIRST KNEW OF INJURY.
 - b. Review Employee and Supervisor Accident reports and provide any named witnesses with the "Witness' Report of Employee Accident" for completion.
 - c. Evaluate any noted hazards related to the accident and consult with the Facilities Director to investigate and mitigate any hazard concerns.
 - d. 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) working days, state penalties may occur.
 - e. Partnership's third party administrator is:

Liberty Mutual Insurance Corporation
 175 Berkeley Street Boston, MA 02116
 Phone: 800-344-0197
4. If employee needs treatment, Human Resources will arrange for the employee to be seen by a provider within the Medical Provider Network (MPN) unless employee has designated their personal physician PRIOR to their injury. Medical Provider Network (MPN): Phone: 800-944-0443 Provider Search: libertymutualgroup.com/providernetworks
 - 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

PROVIDENCE ST. JOSEPH HOSPITAL EUREKA

2700 Dolbeer St. Eureka, CA 95501
 Phone: 707-445-8121
 Hours: Open 24/7

Policy/Procedure Number: HR803		Lead Department: Human Resources	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

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

ENLOE MEDICAL CENTER

1531 Esplanade Chico, CA 95929

Phone: 530-332-7300

SIERRA NEVADA MEMORIAL HOSPITAL

155 Glasson Way Grass Valley, CA 95945

Phone: 530-274-6000

5. 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.
6. 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.)
7. 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.
8. Employee's time sheet must annotate any time off due to on-the-job injury (i.e., doctor appointments and/or physical therapy). Return to Work Program
 - a. Partnership recognizes the need to assess modified duty/transitional work opportunities for employees who are unable to perform their regular duties due to occupational injury or illness. The amount of modified duty/transitional work available may be limited.
 - b. Modified Duty/Transitional Work Assignment
 - 1) Human Resources will review restrictions with department leadership and assess the availability of a modified position/transitional work assignment.
 - 2) The employee will be returned to work within the restrictions given by the physician, with the priority being to assign the employee to the same job observing the prescribed restrictions.
 - 3) If appropriate tasks cannot be found within the same job, the employee may be placed in another job that meets the prescribed restrictions.
 - 4) If there are no jobs at Partnership that meet the prescribed restrictions and restrictions are expected to last at least four weeks, the Workers' Compensation administrator's Temporary Transitional Employment (TTE) program will be utilized. The program places an injured

Policy/Procedure Number: HR803		Lead Department: Human Resources	
Policy/Procedure Title: Workers' Compensation		☐ External Policy ☒ Internal Policy	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

worker in a temporary job with a volunteer/nonprofit organization. During the program, the administrator fosters communication with all parties and provides ongoing monitoring and verification of hours worked each week at the volunteer site. The program closes once:

- The injured worker is able to return to work at Partnership,
 - The injured worker reaches maximum medical improvement, or
 - Partnership is no longer willing to participate in the program.
- 5) If the physician determines the employee is not able to perform modified/return to work tasks, the employee will be placed on leave until appropriate work can be assigned or the restrictions are lifted.
 - 6) Under the RTW program, Partnership does not intend to create long-term jobs to accommodate permanent disability. Thus, all employee participation in the program will be for a period to be determined based on the treatment plan and physician diagnosis.
 9. Employees are required to submit physician's work status report to Human Resources following 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.

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, 03/21/2025, 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO: N/A

PARTNERSHIP HEALTHPLAN OF CALIFORNIA

POLICY / PROCEDURE

Policy/Procedure Number: HR807			Lead Department: Human Resources	
Policy/Procedure Title: Cyber Security & Internet Usage			☐ External Policy ☒ Internal Policy	
Original Date: 01/01/2000		Next Review Date: 07/17/2026 Last Review Date: 07/17/2025		
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees	
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD	☐ COMPLIANCE	☐ FINANCE	☐ PAC
	☒ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/17/2025	

I. RELATED POLICIES: N/A

II. IMPACTED DEPTS:
A. All Departments

III. DEFINITIONS: N/A

IV. ATTACHMENTS:
A. [Cyber Security & Internet Usage Acknowledgement Form](#)

V. PURPOSE:
It is the policy of Partnership HealthPlan of California (Partnership) that all members of the Partnership workforce protect and ensure appropriate use of Partnership's systems.

VI. POLICY / PROCEDURE:
A. Cyber Security

1. To mitigate the risk and to assist with safeguarding Partnership's information systems, Partnership will frequently conduct random cyber security social engineering tests, such as Phishing tests.
 - a. Failure to pass these tests, or real attacks, will result in the following consequences:
 - 1) 1st - 4th phishing test failure in a rolling 12-month period
 - i. Read and attest to the Cyber Security & Internet Usage Policy.
 - ii. Take additional LMS training which must be completed within two weeks from launch date.
 - iii. Have a documented discussion with their manager.
 - 2) 5th - 7th phishing test failure in a rolling 12-month period
 - i. Employee must attend weekly training huddle meetings with the IT Security team for one (1) month.
 - 3) 8th phishing test failure in a rolling 12-month period
 - i. Employee will be subject to a .5% decrease from their recommended merit score on the subsequent focal review. For example, if an employee is recommended for a 3.0% increase, it will be reduced to a 2.5% merit increase.
2. Additional consequences may be considered at the discretion of the CEO and CHRO depending on the severity of actual breaches and/or repeated violations, which may result in further disciplinary action up to and including termination of employment.
3. Employees that have zero (0) failure occurrences can be recognized on their focal review within the Brand Ambassador core competency section. Final scoring is at the discretion of the leadership team

Policy/Procedure Number: HR807		Lead Department: Human Resources	
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Applies to:	☐ Medi-Cal	☐ Healthy Kids	☒ Employees

and will be determined after assessing all Brand Ambassador characteristics.

B. Internet Usage:

1. Examples of appropriate Internet Usage:
 - a. Providing or collecting information regarding Partnership business;
 - b. Communicating with other agencies regarding Partnership business;
 - c. Providing or collecting information that is in the performance of an employee's regular assigned duties;
 - d. Providing information regarding job announcements for Partnership;
 - e. Easing performance of any task or project as assigned by an employee's supervisor, manager, or director;
 - f. Discretionary use of Internet Electronic Mail.
2. It is not possible to list all unacceptable internet usage. However, the following are examples of inappropriate internet usage:
 - a. Sending or distributing any material or comment that is discriminatory, offensive, defamatory, or harassing;
 - b. Distribution of copyrighted materials violating copyright laws;
 - c. Sending, printing, or otherwise distributing proprietary data, trade secrets or other confidential Partnership information;
 - d. Sending, knowingly receiving, or soliciting sexually oriented messages or images;
 - e. Creating acts of fraud, waste or abuse;
 - f. Purposely creating any message that purports to be from another person without their permission;
 - g. Engaging in any activity which violates the law;
 - h. Engaging in any activity which violates Partnership's confidentiality and other policies.
3. Since Internet access and use are intended to be used for Partnership business, Partnership employees shall have no right or expectation of privacy in any Internet activity using Partnership equipment. Partnership reserves the rights to monitor, access, retrieve, read, and disclose all communications at any time.

C. To request assistance with any computer, phone, or fax related issues you must submit a ticket via the IT Service Desk.

D. Violations of this policy will lead to immediate counseling and disciplinary action, up to and including termination of employment. Any disciplinary action regarding the employee to refrain from reporting to work for a period of time may be without pay.

VII. REFERENCES: N/A

VIII. DISTRIBUTION:

A. PowerDMS

IX. POSITION RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources Department, Information Technology Department

X. REVISION DATES:

03/15/2016, 03/25/2011, 02/07/2013, 03/01/2023, 08/29/2023, 05/14/2024, 07/17/2025

**PARTNERSHIP HEALTHPLAN OF CALIFORNIA
POLICY/ PROCEDURE**

Policy/Procedure Number: HR817			Lead Department: Human Resources	
Policy/Procedure Title: Employee Social Media			☐ External Policy ☒ Internal Policy	
Original Date: 03/18/2025		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026		
Applies to:	☐ Medi-Cal	☐ Employees		
Reviewing Entities:	☐ IQI	☐ P & T	☐ QUAC	
	☐ OPERATIONS	☐ EXECUTIVE	☐ COMPLIANCE	☐ DEPARTMENT
Approving Entities:	☐ BOARD		☐ COMPLIANCE	☐ FINANCE
	☐ CEO	☐ COO	☐ CREDENTIALING	☐ DEPT. DIRECTOR/OFFICER
Approval Signature: Sonja Bjork			Approval Date: 07/18/2026	

I. RELATED POLICIES:

- A. [ADM-37](#) - Social Media
- B. [CMP10](#) – Confidentiality
- C. [HR115](#) – Discrimination, Harassment, and Retaliation Prevention
- D. [HR118](#) - Workplace Violence Prevention Plan
- E. [HR400](#) – Open Door Policy
- F. [HR401](#) - Employee Conduct and Work Rules
- G. [HR807](#) – Cyber Security & Internet Usage

II. IMPACTED DEPTS:

- A. All Departments

III. DEFINITIONS:

- A. Social Media: Includes any form of communicating or posting information or content of any sort on the Internet.
- B. Social Media Platforms: Social media websites, whether or not associated or affiliated with Partnership, including but not limited to: Facebook, Instagram, LinkedIn, X, TikTok, blogs, feeds, personal websites, social networking sites, web bulletin boards, or chat rooms.

IV. ATTACHMENTS:

- A. [Employee Social Media Best Practices](#)

V. PURPOSE:

Partnership HealthPlan of California (Partnership) understands that many employees regularly use personal social media platforms. Although we respect your privacy away from work and online, we also want to ensure you understand how and when your personal social media use can also affect your job. We understand you have the right to post and engage online on your own time. But ultimately, you solely are responsible for what you post. In some circumstances, when your conduct violates Partnership policy or the law, such as if you post confidential and proprietary information or intentionally false or misleading content about Partnership, your social media use may result in consequences such as discipline, up to and including termination or even legal action. Employees should consider the guidelines in this policy when deciding to post or share information online. Employees or leaders who need further guidance should contact HRhelpdesk@partnershiphp.org.

Policy/Procedure Number: HR817		Lead Department: Human Resources	
Policy/Procedure Title: Employee Social Media		☐ External Policy ☒ Internal Policy	
Original Date: 03/18/2025		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☐ Employees

VI. POLICY / PROCEDURE:

- A. Company Rules Apply
 1. Carefully read all Related Policies noted in section I above. Inappropriate postings that may violate our policies (such as threatening a coworker with physical violence or making unsolicited sexual comments to a vendor and/or coworker) may subject you to disciplinary action up to and including termination even if posted outside of work.
- B. Consider Your Working Relationships
 1. Employees, providers, members, and business partners may see your post history even if set to private and even if you are using a locked account. Keep in mind that you are more likely to resolve work-related complaints by speaking directly with your coworkers, supervisor, or Human Resources [or by using our “Open Door” policy HR400] than by posting complaints to a social media outlet. If you decide to post complaints or criticism, consider whether you are using statements, photographs, video, or audio that reasonably could be viewed as malicious, obscene, harassing, or threatening.
 2. Although some types of online conduct are protected by the law, personal attacks or malicious conduct generally is not. For example, making fun of a coworker’s or client’s appearance on social media may negatively affect your working relationships, Partnership, and your job.
- C. Be Honest and Accurate
 1. If you post about your job or Partnership, please be honest and accurate. If you make a mistake, correct it quickly. Remember that the Internet archives almost everything; therefore, even deleted postings can be searched. Never post any information or rumor that you know to be false about Partnership, fellow employees, providers, members, and business partners.
- D. Comply with the Law and Your Obligations
 1. Maintain the confidentiality of proprietary information. We also are obligated to avoid misleading consumers regarding product testimonials, endorsements, business relationships, and sources of information. Accordingly, do not create a link from your blog, website, or other social networking site to our website without identifying yourself as one of our employees.
- E. Do not represent yourself as a spokesperson for Partnership without receiving authorization in writing. If Partnership is a subject of the content you are creating, make it clear that you are not speaking on behalf of Partnership or anyone else who has not expressly authorized you to do so (e.g., fellow employees).
 1. Using Social Media While Working
 - a. Refrain from using social media while on work time or on equipment provided by Partnership unless it is work-related as authorized by your supervisor and the Communications Department or consistent with the “Internet Usage” policy.
 - b. Do not use company email addresses to register on social networks, blogs, or other online tools intended for personal use.
- F. Protected Activity and Prohibited Retaliation
 1. Nothing in this policy prevents you from discussing wages, working conditions, or conduct you believe is unlawful with your coworkers or any other person. However, you are encouraged to bring these concerns to Partnership directly using the “Open Door” policy.
 2. Partnership prohibits retaliation for reporting a concern under this policy as well as for participating in the investigation of such a concern. This commitment means you cannot be disciplined, terminated, or otherwise have your working conditions negatively affected because you notified us of a perceived violation of this policy, or assisted us in investigating someone else’s complaint. If you believe someone has violated this policy against retaliation, please report it to Human Resources immediately.

Policy/Procedure Number: HR817		Lead Department: Human Resources	
Policy/Procedure Title: Employee Social Media		☐ External Policy ☒ Internal Policy	
Original Date: 03/18/2025		Next Review Date: 07/15/2027 Last Review Date: 07/15/2026	
Applies to:	☐ Medi-Cal	☐ Healthy Kids	☐ Employees

G. Media Contacts

1. Employees should not speak to the media on behalf of the organization. To ensure consistency of messaging, all media inquiries seeking a statement from us or information about our positions on any topic should be directed to Communications@partnershiphp.org and press@partnershiphp.org.

VII. REFERENCES:

A. N/A

VIII. DISTRIBUTION:

A. All employees

IX. DEPARTMENT RESPONSIBLE FOR IMPLEMENTING PROCEDURE: Human Resources

X. REVISION DATES: 07/15/2026 (review only; no changes)

PREVIOUSLY APPLIED TO:

2026 Organization Operational Calendar

Color Key: Company Wide Event; PHC Holidays; Mandatory Training.

January	February	March
1-Jan New Year's Day 2-Jan Employee Handbook 2026 2-Jan Partnership Compliance Plan 2026 2-Jan Conflict of Interest 2026 7-Jan IQI Meeting 8-Jan Physician's Advisory Committee (PAC) 9-Jan Executive Committee Meeting 14-Jan Operations Committee Meeting 14-Jan Medicare Operations Meeting 15-Jan Q/UAC Meeting 16-Jan Executive Committee Meeting 19-Jan MLK Holiday 21-Jan Strategic Planning Committee 21-Jan HR Steering Committee 21-Jan Finance Committee 22-Jan Executive Committee Meeting 27-Jan Data Quality Governance Council 27-Jan Town Hall 28-Jan IT Steering Committee 30-Jan Executive Committee Meeting 31-Jan Fairfield's Annual Employee Party	1-Feb Memoranda of Understanding 1-Feb Transgender, Gender-Diverse, and Intersex Cultural Competency 5-Feb Executive Committee Meeting 5-Feb Town Hall (Virtual) 10-Feb IQI Meeting 10-Feb Operations Committee Meeting 11-Feb Physician's Advisory Committee (PAC) 11-Feb Employee of The Year Event 12-Feb Executive Committee Meeting 16-Feb Presidents' Day Holiday 18-Feb Finance Committee 19-Feb Executive Committee Meeting 25-Feb PHC Board Meeting 26-Feb Executive Committee Meeting	9-Mar Executive Committee Meeting 10-Mar IQI Meeting 10-Mar Operations Committee Meeting 12-Mar Executive Committee Meeting 12-Mar Consumer Advisory Committee Meeting (CAC) 18-Mar Finance Committee 18-Mar IT Steering Committee 19-Mar Executive Committee Meeting 26-Mar Executive Committee Meeting 31-Mar National Farm Workers Day
April	May	June
1-Apr Diversity, Inclusion, and Belonging 2-Apr Executive Committee Meeting 6-Apr Executive Committee Meeting 6-Apr Health Equity Week (April 6 - April 10) 7-Apr Q2 Town Hall 7-Apr IQI Meeting 8-Apr Physician's Advisory Committee (PAC) 14-Apr Operations Committee Meeting 15-Apr Finance Committee 15-Apr Strategic Planning Committee 15-Apr Q/UAC Meeting 16-Apr Executive Committee Meeting 16-Apr National Healthcare Decision Day 22-Apr PHC Board Meeting 22-Apr Board Strategic Planning Retreat 22-Apr Administrative Professionals Day 30-Apr Executive Committee Meeting	1-May Executive Committee Meeting 5-May Nurses Day (National Nurses Week Mon 5/5 - Sun 5/11) 8-May Executive Committee Meeting 12-May Mental Health Awareness Week (May 12-18) 13-May IQI Meeting 13-May Operations Committee Meeting 14-May Physician's Advisory Committee (PAC) 21-May Finance Committee 21-May Q/UAC Meeting 21-May Employee Recognition Celebration 22-May Executive Committee Meeting 21-May HR Steering Committee 26-May Memorial Day Holiday 27-May IT Steering Committee 29-May Executive Committee Meeting	1-Jun Focal Review Launch 5-Jun Executive Committee Meeting 10-Jun Operations Committee Meeting 10-Jun IQI Meeting 11-Jun Physician's Advisory Committee (PAC) 12-Jun Executive Committee Meeting 12-Jun Consumer Advisory Committee Meeting (CAC) 18-Jun Finance Committee 18-Jun HR Steering Committee 18-Jun Q/UAC Meeting 19-Jun Juneteenth 19-Jun Executive Committee Meeting 24-Jun IT Steering Committee 25-Jun PHC Board Meeting 26-Jun Executive Committee Meeting
July	August	September
2-Jul Executive Committee Meeting 3-Jul Independence Day Holiday (Observed) 6-Jul Executive Committee Meeting 7-Jul IQI Meeting 9-Jul Executive Committee Meeting 14-Jul Q3 Town Hall 15-Jul Strategic Planning Committee 15-Jul IT Steering Committee 15-Jul Q/UAC Meeting 20-Jul Executive Committee Meeting 21-Jul Operations Committee Meeting 21-Jul Q3 Town Hall (Virtual) 22-Jul Focal Review Direct Supervisor Write Block Day 1 23-Jul Executive Committee Meeting 30-Jul Focal Review Direct Supervisor Write Block Day 2	3-Aug Executive Committee Meeting 5-Aug Employee Summer Celebration (Chico) 6-Aug Executive Committee Meeting 11-Aug Operations Committee Meeting 11-Aug IQI Meeting 12-Aug Focal Review Second Level Review Block Day 12-Aug Physician's Advisory Committee (PAC) 19-Aug Finance Committee 19-Aug Q/UAC Meeting 19-Aug IT Steering Committee 20-Aug Personnel Committee Meeting 20-Aug Employee Summer Celebration (Fairfield) 20-Aug HR Steering Committee 20-Aug Executive Committee Meeting 24-Aug Executive Team Huddle 26-Aug PHC Board Meeting 27-Aug Executive Committee Meeting	1-Sep Healthcare Fraud, Waste, and Abuse 1-Sep HIPAA Privacy and Security Overview 1-Sep Partnership Code of Conduct 2-Sep Employee Summer Celebration (Auburn) 3-Sep Executive Committee Meeting 7-Sep Labor Day Holiday 8-Sep Operations Committee Meeting 8-Sep IQI Meeting 9-Sep Employee Summer Celebration (Santa Rosa) 9-Sep Physician's Advisory Committee (PAC) 10-Sep Executive Committee Meeting 10-Sep Consumer Advisory Committee Meeting (CAC) 14-Sep Executive Team Huddle 16-Sep HR Steering Committee 16-Sep Finance Committee 16-Sep Q/UAC Meeting 16-Sep Employee Summer Celebration (Eureka) 16-Sep IT Steering Committee 17-Sep Executive Committee Meeting 21-Sep Executive Team Huddle 21-Sep Compliance Week 22-Sep Leadership Retreat 23-Sep Employee Summer Celebration (Redding)
October	November	December
1-Oct Cybersecurity Awareness Month 5-Oct Executive Committee Meeting 5-Oct Mental Health Awareness Week 5-Oct Customer Service Week (through the 10th) 6-Oct Q4 Town Hall 8-Oct Executive Committee Meeting 12-Oct Executive Committee Meeting 13-Oct Finance Committee 13-Oct IQI Meeting 13-Oct Operations Committee Meeting 14-Oct Physician's Advisory Committee (PAC) 15-Oct Executive Committee Meeting 21-Oct Q/UAC Meeting 21-Oct HR Steering Committee 21-Oct Strategic Planning Committee 21-Oct IT Steering Committee 22-Oct Executive Committee Meeting 27-Oct Q4 Town Hall (Virtual) 28-Oct PHC Board Meeting 29-Oct Halloween 29-Oct Executive Committee Meeting	2-Nov Executive Committee Meeting 4-Nov Physician's Advisory Committee (PAC) 4-Nov Staff Appreciation Luncheon (Shasta View) 5-Nov Staff Appreciation Luncheon (Airpark) 5-Nov Executive Committee Meeting 9-Nov Executive Committee Meeting 10-Nov IQI Meeting 11-Nov Veterans' Day 13-Nov Executive Committee Meeting 18-Nov Finance Committee 18-Nov HR Steering Committee 18-Nov Q/UAC Meeting 18-Nov Staff Appreciation Luncheon (Fairfield) 18-Nov IT Steering Committee 19-Nov Executive Committee Meeting 23-Nov Executive Committee Meeting 26-Nov Thanksgiving Holiday (through 11/27)	1-Dec Harassment Prevention 2-Dec Board Meeting 3-Dec Executive Committee Meeting 7-Dec Executive Committee Meeting 7-Dec Pictures with Santa's 8-Dec Operations Committee Meeting 10-Dec Executive Committee Meeting 11-Dec Consumer Advisory Committee Meeting (CAC) 14-Dec Executive Committee Meeting 16-Dec Finance Committee 16-Dec IT Steering Committee 16-Dec HR Steering Committee 17-Dec Executive Committee Meeting 21-Dec Executive Committee Meeting 25-Dec Christmas Holiday (observed 24-25)