



December 21, 2016

Mr. Jeremy Crosby
Intake Supervisor
Equal Employment Opportunity Commission
Houston District Office
Mickey Leland Building
1919 Smith Street, 6th Floor
Houston, Texas 77002

RE: Charge of Discrimination Against Legacy Community Health

Mr. Crosby:

First Liberty Institute represents Karen "Alexia" Palma. Please refer all future communications to me.

Enclosed, please find the necessary documentation to file a formal charge of religious discrimination and retaliation against Legacy Community Health. We have enclosed the EEOC Intake Questionnaire and Form 5, and a supplement to the EEOC Questionnaire and trust the same will be sufficient for the EEOC to launch its immediate investigation into the matter alleged. Note: the enclosed statement is responsive to questions 5 through 8 of the Questionnaire and as indicated on Form 5.

I can be reached with questions at 972-941-4444 or hsasser@firstliberty.org.

Sincerely,

A handwritten signature in black ink, appearing to read "H. Sasser", with a long, sweeping horizontal line extending to the right.

Hiram S. Sasser,
Deputy Chief Counsel.



U.S. EQUAL EMPLOYMENT OPPORTUNITY COMMISSION

Thank you for using the EEOC Assessment System. The information you gave us indicates that your situation may be covered by the laws we enforce. If you want to file a charge, you can start the process by filling out the Intake Questionnaire, signing it, and either bringing it or mailing it to the EEOC office listed below right away. If you live within 50 miles of the EEOC office listed below, we recommend that you bring the completed questionnaire with you to this office to discuss your situation.

EEOC Houston District Office
Mickey Leland Building
1919 Smith Street, 7th Floor
Houston, TX 77002

If you would like to bring the questionnaire to us in person instead of mailing it to us, please click <http://www.eeoc.gov/field/index.cfm> to find out the office hours of the EEOC office closest to you. If you would like to fax the questionnaire to us, please click <http://www.eeoc.gov/field/index.cfm> to find out the fax number of the office nearest to you.

You should be aware that filing a charge can take up to two hours. If you find that you are having difficulty completing the questionnaire on your own, you may call the number below for assistance.

Please be sure to:

- Answer all questions as completely as possible.
- Include the location where you work(ed) or applied.
- Complete all pages and sign the last page.
- Attach additional pages if you need more space to complete your responses.

You can find out more information about the laws we enforce and our charge-filing procedures on our website at www.eeoc.gov.

If you want to file a charge about job discrimination, there are time limits to file the charge. In many States that limit is 300 days from the date you knew about the harm or negative job action, but in other States it is 180 days. To protect your rights, it is important that you fill out the questionnaire, sign it, and bring it or send it to us right away.

Filling out and bringing us or sending us this questionnaire does not mean that you have filed a charge. This questionnaire will help us look at your situation and figure out if you are covered by the laws we enforce. If you live within 50 miles of the office listed above, we recommend that you bring the completed questionnaire to us to discuss your situation. If you mail the completed questionnaire to us, someone from the EEOC should contact you by mail or by phone within 30 days. If you don't hear from us in 30 days, please call us at 1-800-669-4000.

Sincerely,

U.S. Equal Employment Opportunity Commission



EQUAL EMPLOYMENT OPPORTUNITY COMMISSION INTAKE QUESTIONNAIRE

Please immediately complete the entire form and return it to the U.S. Equal Employment Opportunity Commission ("EEOC"). **REMEMBER**, a charge of employment discrimination must be filed within the time limits imposed by law, generally within 180 days or in some places 300 days of the alleged discrimination. Upon receipt, this form will be reviewed to determine EEOC coverage. **Answer all questions as completely as possible, and attach additional pages if needed to complete your response(s). If you do not know the answer to a question, answer by stating "not known."** If a question is not applicable, write "n/a." Please Print.

1. Personal Information

Last Name: Palma First Name: Karen ("Alexia") MI: A
Street or Mailing Address: [REDACTED] Apt Or Unit #: [REDACTED]
City: [REDACTED] County: [REDACTED] State: [REDACTED] ZIP: [REDACTED]
Phone Numbers: Home: ([REDACTED]) Work: ([REDACTED])
Cell: ([REDACTED]) Email Address: [REDACTED]
Date of Birth: [REDACTED] Sex: Male ☐ Female ☐ Do You Have a Disability? ☐ Yes ☐ No
Please answer each of the next three questions. i. Are you Hispanic or Latino? ☒ Yes ☐ No
ii. What is your Race? Please choose all that apply. ☐ American Indian or Alaska Native ☐ Asian ☒ White
☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander
iii. What is your National Origin (country of origin or ancestry)? Guatamalan

Please Provide The Name Of A Person We Can Contact If We Are Unable To Reach You:

Name: Tino Parra Relationship: Uncle
Address: [REDACTED] City: [REDACTED] State: [REDACTED] Zip Code: [REDACTED]
Home Phone: [REDACTED] Other Phone: ([REDACTED])

2. I believe that I was discriminated against by the following organization(s): (Check those that apply)

☒ Employer ☐ Union ☐ Employment Agency ☐ Other (Please Specify) [REDACTED]

Organization Contact Information (If the organization is an employer, provide the address where you actually worked. If you work from home, check here ☐ and provide the address of the office to which you reported.) **If more than one employer is involved, attach additional sheets.**

Organization Name: Legacy Community Health
Address: 5602 Lyons Ave. **County:** Harris
City: Houston **State:** TX **Zip:** 77020 **Phone:** ([REDACTED])
Type of Business: Health care facility **Job Location if different from Org. Address:** [REDACTED]
Human Resources Director or Owner Name: Diana Dean **Phone:** ([REDACTED])
Number of Employees in the Organization at All Locations: Please Check (✓) One
☐ Fewer Than 15 ☐ 15 - 100 ☐ 101 - 200 ☐ 201 - 500 ☒ More than 500

3. Your Employment Data (Complete as many items as you can) Are you a Federal Employee? ☐ Yes ☐ No

Date Hired: September 9, 2013 **Job Title At Hire:** Health Promotion Coordinator
Pay Rate When Hired: \$32,236.00/year **Last or Current Pay Rate:** \$40,000/year
Job Title at Time of Alleged Discrimination: Health Educator **Date Quit/Discharged:** July 8, 2016
Name and Title of Immediate Supervisor: Elizabeth Mondello

If Job Applicant, Date You Applied for Job _____ Job Title Applied For _____

4. What is the reason (basis) for your claim of employment discrimination?

FOR EXAMPLE, if you feel that you were treated worse than someone else because of race, you should check the box next to Race. If you feel you were treated worse for several reasons, such as your sex, religion and national origin, you should check all that apply. If you complained about discrimination, participated in someone else's complaint, or filed a charge of discrimination, and a negative action was threatened or taken, you should check the box next to Retaliation.

☐ Race ☐ Sex ☐ Age ☐ Disability ☐ National Origin ☒ Religion ☒ Retaliation ☐ Pregnancy ☐ Color (typically a difference in skin shade within the same race) ☐ Genetic Information; choose which type(s) of genetic information is involved:
☐ i. genetic testing ☐ ii. family medical history ☐ iii. genetic services (genetic services means counseling, education or testing)

If you checked color, religion or national origin, please specify: Catholic

If you checked genetic information, how did the employer obtain the genetic information? _____

Other reason (basis) for discrimination (Explain). _____

5. What happened to you that you believe was discriminatory? Include the date(s) of harm, the action(s), and the name(s) and title(s) of the person(s) who you believe discriminated against you. Please attach additional pages if needed.

(Example: 10/02/06 - Discharged by Mr. John Soto, Production Supervisor)

A) Date: See Attachment Action: See Attachment

Name and Title of Person(s) Responsible: _____

B) Date: _____ Action: _____

Name and Title of Person(s) Responsible: _____

6. Why do you believe these actions were discriminatory? Please attach additional pages if needed.

See Attachment

7. What reason(s) were given to you for the acts you consider discriminatory? By whom? His or Her Job Title?

See Attachment

8. Describe who was in the same or similar situation as you and how they were treated. For example, who else applied for the same job you did, who else had the same attendance record, or who else had the same performance? Provide the race, sex, age, national origin, religion, or disability of these individuals, if known, and if it relates to your claim of discrimination. For example, if your complaint alleges race discrimination, provide the race of each person; if it alleges sex discrimination, provide the sex of each person; and so on. Use additional sheets if needed.

Of the persons in the same or similar situation as you, who was treated *better* than you?

A. <u>Full Name</u> See Attachment	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
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Description of Treatment

B. <u>Full Name</u>	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
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Description of Treatment

Of the persons in the same or similar situation as you, who was treated *worse* than you?

A. <u>Full Name</u> See Attachment	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
<u>Description of Treatment</u>		

B. <u>Full Name</u>	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
<u>Description of Treatment</u>		

Of the persons in the same or similar situation as you, who was treated the *same* as you?

A. <u>Full Name</u> See Attachment	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
<u>Description of Treatment</u>		

B. <u>Full Name</u>	<u>Race, sex, age, national origin, religion or disability</u>	<u>Job Title</u>
<u>Description of Treatment</u>		

Answer questions 9-12 only if you are claiming discrimination based on disability. If not, skip to question 13. Please tell us if you have more than one disability. Please add additional pages if needed.

9. Please check all that apply:

- ☐ Yes, I have a disability
- ☐ I do not have a disability now but I did have one
- ☐ No disability but the organization treats me as if I am disabled

10. What is the disability that you believe is the reason for the adverse action taken against you? Does this disability prevent or limit you from doing anything? (e.g., lifting, sleeping, breathing, walking, caring for yourself, working, etc.).

11. Do you use medications, medical equipment or anything else to lessen or eliminate the symptoms of your disability?

Yes ☐ No ☐

If "Yes," what medication, medical equipment or other assistance do you use?

12. Did you ask your employer for any changes or assistance to do your job because of your disability?

Yes ☐ No ☐

If "YES", when did you ask? _____ How did you ask (verbally or in writing)? _____

Who did you ask? (Provide full name and job title of person)

Describe the changes or assistance that you asked for:

How did your employer respond to your request?

13. Are there any witnesses to the alleged discriminatory incidents? If yes, please identify them below and tell us what they will say. (Please attach additional pages if needed to complete your response)

A. Full Name	Job Title	Address & Phone Number
See Attachment		

What do you believe this person will tell us?

B. Full Name	Job Title	Address & Phone Number

What do you believe this person will tell us?

14. Have you filed a charge previously in this matter with EEOC or another agency? Yes ☐ No ☒

15. If you have filed a complaint with another agency, provide name of agency and date of filing:

16. Have you sought help about this situation from a union, an attorney, or any other source? Yes ☒ No ☐

Provide name of organization, name of person you spoke with and date of contact. Results, if any?

First Liberty Institute, Jeremy Dys and Stephanie Taub. I first spoke with the attorneys on July 8, 2016. They agreed to represent me.

Please check one of the boxes below to tell us what you would like us to do with the information you are providing on this questionnaire. If you would like to file a charge of job discrimination, you must do so either within 180 days from the day you knew about the discrimination, or within 300 days from the day you knew about the discrimination if the employer is located in a place where a state or local government agency enforces laws similar to the EEOC's laws. **If you do not file a charge of discrimination within the time limits, you will lose your rights. If you would like more information before filing a charge or you have concerns about EEOC's notifying the employer, union, or employment agency about your charge, you may wish to check Box 1. If you want to file a charge, you should check Box 2.**

Box 1 ☐ I want to talk to an EEOC employee before deciding whether to file a charge. I understand that by checking this box, I have not filed a charge with the EEOC. **I also understand that I could lose my rights if I do not file a charge in time.**

Box 2 ☒ I want to file a charge of discrimination, and I authorize the EEOC to look into the discrimination I described above. I understand that **the EEOC must give the employer, union, or employment agency that I accuse of discrimination information about the charge, including my name.** I also understand that the EEOC can only accept charges of job discrimination based on race, color, religion, sex, national origin, disability, age, genetic information, or retaliation for opposing discrimination.


Signature

12/21/16
Today's Date

PRIVACY ACT STATEMENT: This form is covered by the Privacy Act of 1974: Public Law 93-579. Authority for requesting personal data and the uses thereof are:

1. **FORM NUMBER/TITLE/DATE.** EEOC Intake Questionnaire (9/20/08).
2. **AUTHORITY.** 42 U.S.C. § 2000e-5(b), 29 U.S.C. § 211, 29 U.S.C. § 626, 42 U.S.C. 12117(a), 42 USC §2000ff-6.
3. **PRINCIPAL PURPOSE.** The purpose of this questionnaire is to solicit information about claims of employment discrimination, determine whether the EEOC has jurisdiction over those claims, and provide charge filing counseling, as appropriate. Consistent with 29 CFR 1601.12(b) and 29 CFR 1626.8(c), this questionnaire may serve as a charge if it meets the elements of a charge.
4. **ROUTINE USES.** EEOC may disclose information from this form to other state, local and federal agencies as appropriate or necessary to carry out the Commission's functions, or if EEOC becomes aware of a civil or criminal law violation. EEOC may also disclose information to respondents in litigation, to congressional offices in response to inquiries from parties to the charge, to disciplinary committees investigating complaints against attorneys representing the parties to the charge, or to federal agencies inquiring about hiring or security clearance matters
5. **WHETHER DISCLOSURE IS MANDATORY OR VOLUNTARY AND EFFECT ON INDIVIDUAL FOR NOT PROVIDING INFORMATION.** Providing of this information is voluntary but the failure to do so may hamper the Commission's investigation of a charge. It is not mandatory that this form be used to provide the requested information.

Questionnaire Supplemental Information

5. What happened to you that you believe was discriminatory? Include the date(s) of harm, the action(s), and the name(s) and title(s) of the person(s) who you believe discriminated against you.

Date: 6/27/2016

Action: Although Legacy had granted me a religious accommodation for 1.5 years so that I would teach about health education subjects not involving birth control, my new supervisor, Ms. Mondello, required me to attend a Planned Parenthood training on birth control. I told her that teaching about birth control violates my sincerely-held religious beliefs as a Catholic.

Name and Title of Person(s) Responsible: Elizabeth Mondello, Director of Public Health Department

Date: On 6/27/2016 or 6/28/2016

Action: Ms. Mondello and Ms. Leonard, Vice President of the Public Health Department, discussed revoking my religious accommodation with each other.

Name and Title of Person(s) Responsible: Elizabeth Mondello, Director of Public Health Department; Amy Leonard, Vice President of the Public Health Department

Date: 6/28/2016

Action: Mr. Toro, Director of Clinical Services, told me that Ms. Leonard asked him a question relating to my religious accommodation. Ms. Leonard told me on the phone, in a stern tone, that we needed to meet to “talk about my job description,” meaning my religious accommodation. I then called Elizabeth Mondello and reported that I was being discriminated against for my religious beliefs. She told me she would have someone from Human Resources be present at that meeting.

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department; Elizabeth Mondello, Director of Public Health Department

Date: 6/29/2016

Action: Ms. Leonard, Ms. Mondello, and Diana Dean, Vice President of Human Resources called me into a meeting. Ms. Leonard revoked my religious accommodation, did not suggest any alternative accommodations, and told me that I had to violate my sincerely-held religious beliefs or else I would be fired. She said, “If you don’t put your religious beliefs aside, you can’t work here.” At the meeting, I brought proof that the accommodation was minimal and that it was working well without causing hardship to Legacy. I also suggested other ways to accommodate me. But Ms. Leonard wasn’t interested in working with me to find an accommodation.

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department; Diana Dean, Vice President of Human Resources; Elizabeth Mondello, Director of Public Health Department

Date: 6/29/2016

Action: Later in the same meeting, Ms. Leonard started insulting my religious beliefs, pressuring me to change my religious beliefs. She told me that she knows lots of other Catholics who use birth control, implying that I don't understand my faith and that Catholicism does not require Catholics to be against birth control.

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department; Diana Dean, Vice President of Human Resources; Elizabeth Mondello, Director of Public Health Department

Date: 6/29/2016

Action: At the end of that meeting on June 29th, they let me know that I would be terminated. They said that I would continue teaching until the end of July.

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department; Diana Dean, Vice President of Human Resources; Elizabeth Mondello, Director of Public Health Department

Date: 6/29/2016

Action: Ms. Leonard stated again by email that "sometimes employees may need to put aside their own personal beliefs or views in order to meet the job requirements."

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department

Date: On or about 6/30/2016

Action: Ms. Leonard discussed my religious accommodation with Dr. Charu Sawhney, Clinical Site Director. I believe that Ms. Leonard said to her something to the effect of, "the Bible was written before birth control was invented," implying that my beliefs about my faith's most sacred text are wrong.

Name and Title of Person(s) Responsible: Amy Leonard, Vice President of the Public Health Department

Date: 6/30/2016

Action: Although I was told in the July 29, 2016 meeting that I would continue work as a Health Educator until the end of the July, the next day, Ms. Dean told me that I would only be allowed to continue working through the next week. My last day was moved to July 8, 2016.

Name and Title of Person(s) Responsible: Diana Dean, Vice President of Human Resources; Amy Leonard, Vice President of the Public Health Department; Elizabeth Mondello, Director of Public Health Department

Date: On or about 7/5/2016 – 7/8/2016

Action: In my final few days, I emailed Ms. Dean and Ms. Leonard requesting clarification about what was happening because I believed that I was being discriminated against because of my Catholic faith. I made it clear in the emails that this was not a mutual termination.

Name and Title of Person(s) Responsible: Diana Dean, Vice President of Human Resources; Amy Leonard, Vice President of the Public Health Department

Date: On or about 7/5/2016 – 7/8/2016

Action: During my last week, sometime between July 5th and July 7th, I called Ms. Dean on the telephone and reported to her that it was discrimination to revoke my religious accommodation. Ms. Dean told me that they would also discriminate against doctors who were against birth control for religious reasons by not hiring them.

Name and Title of Person(s) Responsible: Diana Dean, Vice President of Human Resources

Date: 7/8/2016

Action: I had my exit interview with Ms. Dean and was involuntarily terminated on July 8, 2016 because I was unwilling to put aside my religious convictions. Ms. Dean told me that “she couldn’t accommodate me because it wasn’t in the job description to accommodate anyone.” She ended the meeting saying that my overall performance was wonderful and I was eligible for rehire.

Name and Title of Person(s) Responsible: Diana Dean, Vice President of Human Resources; Amy Leonard, Vice President of the Public Health Department; Elizabeth Mondello, Director of Public Health Department

6. Why do you believe these actions were discriminatory?

Legacy acted unlawfully for several reasons, as explained in the attached letter,

First, Ms. Leonard and Ms. Mondello knew that I required a religious accommodation and yet refused to work with me at all to try to seek out an appropriate accommodation. Under the Supreme Court's *Abercrombie* decision, a supervisor cannot immediately fire an employee after learning about a need for an accommodation just so that the company can avoid the possibility of having to accommodate the employee. *EEOC v. Abercrombie & Fitch Stores, Inc.*, 135 S. Ct. 2028, 2033 (2015) (holding "an employer who acts with the motive of avoiding accommodation may violate Title VII"). Instead, employers have a duty to accommodate the religious beliefs of their employees when it would not cause undue hardship. 42 U.S.C. § 2000e(j). Here, Ms. Leonard removed my long-standing religious accommodation, despite the fact that it caused Legacy no undue hardship, and then fired me without *any* good faith effort to consider another accommodation.

Ms. Leonard's improper motivation, her desire to avoid accommodating me, is shown by at least the following facts: (1) upon learning of my need for an accommodation, Ms. Leonard called me into a meeting in order to fire me if I did not "put my beliefs aside," rather than try to work out any problems with the existing accommodation; (2) Ms. Leonard made statements implying that *my* religious beliefs were incorrect interpretations of *her* understanding of Catholicism; (3) Ms. Leonard attempted to persuade me to change or put aside my beliefs rather than try to accommodate me; (4) Legacy initially told me that I would continue work as a Health Educator until the end of July, but then pushed up my last day to July 8, 2016 — just eleven days after Ms. Leonard learned of my need for an accommodation.

Next, it was discriminatory for Legacy to revoke my religious accommodation, without considering, much less providing, an alternative religious accommodation, especially when accommodating my beliefs had not caused, and would not cause, even minimal hardship on Legacy. At least three different kinds of religious accommodations were available to Legacy: (1) the previous video curriculum accommodation, (2) voluntary shift swaps, and (3) lateral transfers. The previous accommodation operated without even minimal hardship on Legacy for one and a half years. I also informed my supervisors that I was open to alternative accommodations, such as voluntary shift swaps and lateral transfers. Under *Davis v. Fort Bend County*, 765 F.3d 480 (5th Cir. 2014), an employee's offer to voluntarily cover a shift is evidence that the burden on the company would be *de minimis*. See also 29 C.F.R. § 1605.2(d)(i). I told Ms. Leonard that at least one Legacy employee, Ms. Aurdis Guidry, was willing to teach the portion of the class for which I needed the accommodation. Such a teaching arrangement is feasible because, according to Diana Dean's email, Legacy planned to have Ms. Mondello teach the family planning course during July.

Next, I also informed my supervisors that other lateral positions within the company would be an appropriate accommodation. See 29 C.F.R. § 1605.2(d)(iii). Before

being transferred to the Lyons location, my Health Educator position focused on chronic disease patients and did not include family planning courses. I would gladly have returned to such a position. I was also informed that Legacy intended to have Health Educators specialize, which could allow me to focus on a topic such as chronic diseases that does not violate my religious beliefs. In the short time before I was terminated, I also sought out more information about other comparable positions within the company, such as reaching out to Lizzette Tienda to find out more information about a position in marketing. However, that position also would have necessitated a religious accommodation, which my employer was clearly unwilling to consider. No comparable positions were offered, and there was no good faith effort on the part of Legacy to match me with a position.

Third, I was retaliated against for requesting an accommodation and for explaining that it could be discriminatory to deny religious accommodations. I reported discrimination at least twice before being fired. First, in a phone call to Ms. Mondello on July 28, 2016, I asserted my rights, my need for a religious accommodation, and I said that I was being discriminated against because of my Catholic beliefs. I told her that it would be unlawful discrimination for Legacy to refuse any sort of religious accommodation. The next day, I was called into a meeting and informed that I had to “put my beliefs aside” or else be terminated. Later, sometime between July 5th and July 7th, I reported the religious discrimination to Ms. Dean by telephone. My last day was on July 8th, even though they originally told me that I would be able to work through the end of July. I believe that my reporting religious discrimination caused or, at a minimum, expedited my termination in retaliation.

Fourth, the policy of not even trying to accommodate religious beliefs has a disparate impact on religious people. If Legacy has a policy of requiring teachers to personally teach all portions of classes, even if they are not asked to teach all classes and even if a *de minimis* religious accommodation is needed, that policy would have a disparate impact. Additionally the policy stated by Ms. Dean that Legacy “couldn’t accommodate me because it wasn’t in the job description to accommodate anyone” would have a disparate impact on people needing an accommodation.

Finally, Legacy created a workplace hostile to religious beliefs. Ms. Leonard and Ms. Dean stated multiple times that I needed to “put aside my beliefs” in order to work at Legacy. Ms. Leonard made statements critical of my Catholic beliefs on birth control and urged me to adopt *her* understanding of *my* religious beliefs. I have reason to believe that Ms. Leonard made similar statements to Dr. Sawhney. Other Legacy employees, such as Tara Chappel, agree that Legacy is hostile toward religious people. The four separate incidents involving Pamela Mosguera, Maribel Davila, Carol Camper, and Blanca Garza that were described earlier further demonstrate the hostility toward religious belief, especially Catholic or Christian belief, that pervades the work environment.

7. What reason(s) were given to you for the acts you consider discriminatory? By whom? His or Her Job Title?

The only reason given to me for my termination was my need for a religious accommodation because I was not able to “put aside” my Catholic beliefs. During my exit interview, Ms. Diana Dean, Vice President of Human Resources, told me that other than this my performance was wonderful and I was eligible for rehire. She said that I was being involuntarily terminated only because I was not able to personally teach about birth control due to my Catholic beliefs. Ms. Leonard, Vice President of Public Health, also told me in person and via email on June 29, 2016, that if I didn’t put my religious beliefs aside, I couldn’t continue to teach at Legacy.

8. Describe who was in the same or similar situation as you and how they were treated. For example, who else applied for the same job you did, who else had the same attendance record, or who else had the same performance? Provide the race, sex, age, national origin, religion, or disability of these individuals, if known, and if it relates to your claim of discrimination. For example, if your complaint alleges race discrimination, provide the race of each person; if it alleges sex discrimination, provide the sex of each person; and so on. Use additional sheets if needed.

Of the persons in the same or similar situation as you, who was treated *better* than you?

Full Name: Unknown

Religion: Buddhist

Job Title: Unknown; He is one of Amy Leonard's employees from the Public Health Department

Description of Treatment: The Buddhist employee appropriately received a religious accommodation. Natalie Leffall, Director of Internal Communications, saw one of Amy Leonard's employees from the Public Health Department with candles lit inside a room at Legacy. She went to talk to Ms. Leonard because she was concerned it was a fire hazard. Ms. Leonard told her the employee was Buddhist and that he needed candles to pray. Amy told Natalie that they needed to accommodate his Buddhist religious beliefs.

Full Name: Dr. Larry Caesar, M.D.

Religion: Unknown

Job Title: Male Pediatrician at Legacy

Description of Treatment: Tanya Edwards told me that Legacy gave an accommodation to a male pediatrician, allowing him to not treat anyone under 13 who was a female. I do not know why he was allowed such a variance from his job description, but I was not allowed a more minor religious accommodation.

Of the persons in the same or similar situation as you, who was treated *worse* than you?

Full Name: N/A

Religion:

Job Title:

Description of Treatment:

Full Name: N/A

Religion:

Job Title:

Description of Treatment:

Of the persons in the same or similar situation as you, who was treated the *same* as you?

Full Name: Blanca Garza

Religion: Christian

Job Title: Eligibility Director

Description of Treatment:

On January 6, 2014, we were celebrating Three Kings Day. That day Blanca Garza, previous Eligibility Director, asked if anyone wanted to pray with her during a break. I told her I would love to join her and a couple of other employees decided to join too. A coworker told us that if the management caught us praying we could get in trouble.

Full Name: Pamela Mosguera

Religion: Christian

Job Title: Medical Assistant

Description of Treatment: Pamela Mosguera would listen to Christian music on her cell phone and talk about God with people on her free time. A doctor filed a complaint. A supervisor or manager told Ms. Mosguera that she could not listen to Christian music on her phone or talk about God in the nurses/providers room.

Full Name: Maribel Davila

Religion: Christian

Job Title: Front Desk

Description of Treatment: Maribel Davila was told by a co-worker she could not talk about the Bible with another coworker, Ramona Colas, at work or they might get in trouble with the management. At the time, they were only around other co-workers, not patients or students.

Full Name: Carol Camper

Religion: Christian

Job Title: Health Educator

Description of Treatment: Legacy did not allow Carol Camper to keep anything religious on her desk or in the health education room even though other people were permitted to have personal items on their desks. It was only personal items related to religion that were banned.

13. Are there any witnesses to the alleged discriminatory incidents? If yes, please identify them below and tell us what they will say.

Full Name: Aurdis Guidry

Job Title: Registered Nurse

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Aurdis Guidry offered to help with my religious accommodation, teaching the class on birth control that I could not due to my religious beliefs. She would also say that she was available to answer any questions about birth control that students would have. She didn't understand why after a year and a half they could not continue accommodating my religious belief when it had never been an issue.

Full Name: Tanya Edward

Job Title: Lactation Consultant/RN

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Tanya Edward was the first person to find out about what had happened in the meeting on 6/29/16. She told me what Amy Leonard and Diana Dean had done to me was wrong and that it was considered discrimination. I had already planned to send Ms. Leonard an email confirming that Ms. Leonard had said I needed to put "my religious beliefs aside." Ms. Edward also encouraged me to do it.

Ms. Edward and I worked together often because we were in the same department. Ms. Edward can testify that for the year and a half I was accommodated it had never caused any hardship on Legacy. Ms. Edward never heard any complaint from the mothers that attended the class.

Full Name: Marlene Cohn

Job Title: Registered Nurse

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Marlene Cohn was shocked to find out that after a year and half of accommodating my religious beliefs it was now it was problem. Ms. Cohn always told me she was there to answer any questions patients may have regarding birth control. She stated how patients would receive enough education in the Family Practice side and with Ramona Colas, Family Nurse Practitioner. Ms. Cohn would always compliment how much the patients loved me and the change I made at Lyons.

Full Name: Natalie Leffall

Job Title: Director of Internal Communications

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Natalie Leffall once saw one of Amy Leonard's employees, from the Public Health Department with candles inside a room. She went to talk to Ms. Leonard because she was concern it was a fire hazard. Ms. Leonard told her the employee was Buddhist and that he

needed candles to pray. Ms. Leonard told Ms. Leffall that they needed to accommodate his religious beliefs.

Full Name: Tara Chappel

Job Title: Clinic Operation Manager

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Tara Chappel was also another person who did not understand why they were letting me go when my religious accommodation was never an issue. She can explain how Legacy would accommodate others, but when it came down to understanding employees with their religious beliefs they didn't want to understand.

Full Name: Fernando Toro

Job Title: Director of Clinical Services

Address & Phone Number:

What do you believe this person will tell us:

Fernando Toro can say that Ms. Leonard asked him a question that related to my accommodation.

Full Name: Ramona Colas

Job Title: Family Nurse Practitioner

Address & Phone Number:

What do you believe this person will tell us:

Ramona Colas, Family Nurse Practitioner, and Marlene Cohn, RN, stated that patients were getting enough information about the different birth control methods in their appointments.

Full Name: Pamela Mosguera

Job Title: Medical Assistant

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Pamela would listen to Christian music on her cell phone and talk about God with people on her free time. A doctor filed a complaint on her. Pamela was told she could not listen to Christian music on her phone or talk about God in the nurses/providers room.

Full Name: Maribel Davila

Job Title: Front Desk

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

Maribel Davila told me on my last day to please speak up otherwise things would not change for those who just wanted to live by their faith. She said that Legacy was willing to accommodate others, but that they didn't want to accommodate religious believers. One time Maribel Davila was talking to Ramona Colas, FNP, about the Bible. They were told they could not do that at work by another employee.

Full Name: Dr. Carrie Chiu

Job Title: M.D.

Address & Phone Number: [REDACTED]

What do you believe this person will tell us:

On m last day, Dr. Carrie Chiu gave me a hug, started to cry, and told me what they had done to me was so wrong.

CHARGE OF DISCRIMINATION

This form is affected by the Privacy Act of 1974. See enclosed Privacy Act Statement and other information before completing this form.

Charge Presented To: _____ Agency(ies) Charge No(s): _____

☐ FEPA

☒ EEOC

Texas Workforce Commission Civil Rights Division

and EEOC

State or local Agency, if any

Name (indicate Mr., Ms., Mrs.)

Ms. Karen Alexia Palma

Home Phone (Incl. Area Code)

Date of Birth

Street Address

City, State and ZIP Code

Named is the Employer, Labor Organization, Employment Agency, Apprenticeship Committee, or State or Local Government Agency That I Believe Discriminated Against Me or Others. (If more than two, list under PARTICULARS below.)

Name

Legacy Community Health

No. Employees, Members

750

Phone No. (Include Area Code)

Street Address

City, State and ZIP Code

5602 Lyons Ave.

Houston, Texas 77020

Name

No. Employees, Members

Phone No. (Include Area Code)

Street Address

City, State and ZIP Code

DISCRIMINATION BASED ON (Check appropriate box(es).)

☐ RACE

☐ COLOR

☐ SEX

☒ RELIGION

☐ NATIONAL ORIGIN

☒ RETALIATION

☐ AGE

☐ DISABILITY

☐ OTHER (Specify below.)

DATE(S) DISCRIMINATION TOOK PLACE

Earliest

Latest

06/27/2016

07/31/2016

☒ CONTINUING ACTION

THE PARTICULARS ARE (If additional paper is needed, attach extra sheet(s)):

Please see attached statements.

I want this charge filed with both the EEOC and the State or local Agency, if any. I will advise the agencies if I change my address or phone number and I will cooperate fully with them in the processing of my charge in accordance with their procedures.

I declare under penalty of perjury that the above is true and correct.

12/20/16
Date

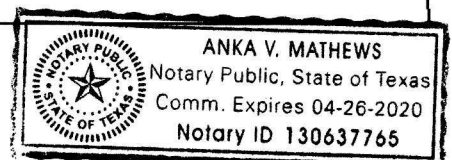
[Signature]
Charging Party Signature

NOTARY – When necessary for State and Local Agency Requirements

I swear or affirm that I have read the above charge and that it is true to the best of my knowledge, information and belief.
SIGNATURE OF COMPLAINANT **[Signature]**

SUBSCRIBED AND SWORN TO BEFORE ME THIS DATE
(month, day, year)

12/20/2016



CHARGE OF DISCRIMINATION

This form is affected by the Privacy Act of 1974. See enclosed Privacy Act Statement and other information before completing this form.

Charge Presented To: _____ Agency(ies) Charge No(s): _____

☐ FEPA

☒ EEOC

Texas Workforce Commission Civil Rights Division

and EEOC

State or local Agency, if any

THE PARTICULARS ARE (If additional paper is needed, attach extra sheet(s)):

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12/20/16

Date



Charging Party Signature

NOTARY – When necessary for State and Local Agency Requirements

I swear or affirm that I have read the above charge and that it is true to the best of my knowledge, information and belief.

SIGNATURE OF COMPLAINANT



SUBSCRIBED AND SWORN TO BEFORE ME THIS DATE
(month, day, year)

12/20/2016



ANKA V. MATHEWS
Notary Public, State of Texas
Comm. Expires 04-26-2020
Notary ID 130637765

Karen Alexia Palma



Equal Employment Opportunity Commission
Houston District Office
Mickey Leland Building
1919 Smith Street, 6th Floor
Houston, Texas 77002

December 20, 2016

Re: Religious Discrimination Charge

My former employer discriminated against me because I am a Catholic. For approximately one and a half years, Legacy Community Health provided me with a religious accommodation. Then, after a new supervisor arrived, Legacy revoked my accommodation and fired me, refusing to consider any possible accommodation. Before I was fired, the head of my department insulted my Catholic beliefs and repeatedly told me I had to “put aside my beliefs” in order to work there. I told the Vice President of Human Resources that being forced to violate my religious beliefs in order to keep my job is unlawful religious discrimination. I was fired shortly after.

My Background

My mother left me in Guatemala when I was only 6 months old to come to the USA. I was raised by my grandparents. Both my grandparents made sure I was baptized in the Catholic Church and taught me the importance of loving God.

When I was 5 years old my mother decided to bring me to the USA to be with her and my stepfather. From the age of 5 until I was 15 years old, I suffered both verbal and physical abuse from my mother. This was one of the most difficult times in my life, and it was bearable only because I was introduced to Catholicism. Despite my abuse, abandonment, and even thoughts of suicide, I was comforted and strengthened by my growing religious beliefs as taught by the Catholic Church. It has taken years to forgive my mother, but only because of the grace God has shown me have I learned to love my mother. That same Catholic faith now forms the basis for who I am. All of my life is ordered by my sincere beliefs guided by the religion of Catholicism.

My Work at Legacy

In 2012, I graduated from the University of Houston with a Bachelor’s Degree in Health Promotion and a minor in Nutrition. I believe it is my duty as a Catholic to help those in need, and I think that I can best give back to my community through health

education. I worked in the Harris County Clinic for six years as a patient care technician before going to work for Legacy.

My employer was Legacy Community Health. Legacy is a health-care facility for low-income patients offering health care, consulting, education, and resources. It has about 750 employees. At least 80 employees are at the Lyons location. The Lyons location's address is 5602 Lyons Ave., Houston, TX 77020. Its telephone number is 832-548-5400.

I was first hired as a Health Promotion Coordinator at Legacy, and I started work on September 9, 2013. Later, I was promoted to a Health Educator, primarily serving patients with chronic illnesses.

I loved my job as a Health Educator. Helping students, most of whom are low income, learn how to better take care of themselves and their families was the most rewarding part of my job. I received very positive feedback from my students, co-workers, and performance reviewers. I have attached a few letters that I've received from former students. Some of the letters are in Spanish because I taught health education classes in English and Spanish. *See* Attachment A (letters from former students); Attachment B (course evaluations from former students); Attachment C (performance reviews). I have also attached examples of positive feedback from Legacy employees, such as three letters of recommendation, emails complimenting my work performance, and compliments displayed on a bulletin board at work. *See* Attachment D (letters of recommendation); Attachment E (emails about my work performance); Attachment F (bulletin board compliments about my work performance).

When I was transferred to the Lyons Avenue location, I began to teach more classes. There, I taught classes on diabetes, high blood pressure, high cholesterol, glucose intolerance, general nutrition education, safe sleep, becoming a mom, breastfeeding, car seat safety, initial maternity, and the occasional course on family planning. *See* Attachment G (courses I taught and student attendance from March through May 2016); Attachment H (job descriptions). The family planning class itself was offered as a small portion of the "Becoming a Mom" series aimed at expectant mothers. I would mostly see patients for chronic disease.

I would still be working at Legacy today if I had not been fired because I refused to "put aside my beliefs" at work and Legacy refused to entertain any religious accommodation.

My Religious Accommodation

As a Catholic, I believe that birth control disrupts the natural beauty of how God designed our bodies to work. The Catholic Church is morally opposed to birth control because it prevents another human from coming into existence. The Catholic church teaches through its Scriptures that we are created in the image of God and we are called to be fruitful and multiply, meaning we are to be open to the bearing of children and we

must not use birth control to prevent conception or destroy embryonic life. The Catechism of the Catholic Church Doctrine No. 2366 instructs that the church is on the side of life and that each marriage act to remain ordered to the procreating of human life. *See also* Catechism of the Catholic Church 2370; Humanae Vitae 14; Vademecum for Confessors 2:4 (Feb. 12, 1997).

Because of my Catholic beliefs, I can teach about Natural Family Planning because it promotes openness to life and does not threaten or destroy life that has been conceived. However, I am not morally permitted to teach about contraceptive methods because that would make me morally complicit in what my religion teaches me is an immoral act. For one and a half years, Legacy acknowledged my religious convictions and provided to me a simple religious accommodation for the family planning class—which teaches about birth control. During this time, with my accommodation in place, students were not only provided with all information required by the course, but were also given direct and immediate access to medical professionals on site to answer any and all questions relating to birth control. Not a single student complained about the course and my performance reviews continued to be above average.

This accommodation respected my religious convictions and permitted Legacy to achieve its educational mission without any hardship to the company.

I have always been completely upfront with Legacy about my religious beliefs, and my supervisor (Maria Cantu) worked with me from the beginning to find a suitable accommodation. Because of the accommodation, I was not required to personally talk about birth control because it goes against my faith. Instead, my supervisor let the class watch an educational video on birth control methods. That way, the students received the entire curriculum, my employer was able to achieve its organizational goals without any hardship, and I wasn't required to violate my beliefs. There were also brochures handed out and several people available on site to answer questions about birth control. For instance, Marlene Cohn, RN, was on-site willing to answer any questions patients would have regarding birth control. Additionally, Ramona Colas, Family Nurse Practitioner, told me she goes over everything whenever a patient visits the Legacy location for birth control.

This religious accommodation was very small and did not increase the work of other employees at Legacy, nor did it cause hardship upon my employer. Moreover, it did not affect the vast majority of what I did as a Health Educator. The entire class was one hour in length, and it was offered 3 times a month. In other words, out of a typical month, just 3 hours of the roughly 170 to 180 hours I worked each month were affected by this accommodation. So, my accommodation affected, at most, only 1.8% of my job.

I have always been open to discussing alternative types of religious accommodations, such as swapping teaching responsibilities with one of the other Health Educators or Legacy employees. There were multiple ways in which my religious beliefs could be accommodated without causing any hardship for Legacy. For instance, Aurdis Guidry, a Registered Nurse at Legacy, volunteered to substitute for me, teaching the

family planning class, so that my religious beliefs would not be violated. Also, Ramona Colas, the on-site Family Nurse Practitioner, would go over birth control methods with any student interested in obtaining birth control from the Lyons Legacy location. In short, there were several options available to Legacy that would accommodate my religious beliefs and permit Legacy to achieve their organizational mission without hardship.

Changes in Management

Everything was working smoothly, until there was a change in management at Legacy. My supervisor Maria Cantu left the Public Health Department. Around early June 2016, Elizabeth Mondello was hired as the Director of Public Health at the Lyons location, becoming my new boss.

When I began working at Legacy, Amy Leonard did not oversee my department, Health Promotion. Around the beginning of 2015, Health Promotion combined with the Public Health, to be known as the Public Health Department. Ms. Leonard was Vice President of the newly combined departments.

Discriminatory Actions

On June 27, 2016, Ms. Mondello said she was going to require all the Health Educators—including me—to visit Planned Parenthood for training on birth control methods. However, going to a Planned Parenthood for mandatory training on a wide range of birth control methods—including those that are expressly forbidden by my Catholic religion—would violate my sincerely-held religious beliefs.

So, I talked to Ms. Mondello and informed her that, as a Catholic, I could not participate in the mandatory training at Planned Parenthood. I told her that the only time I had even gone close to Planned Parenthood was to pray for God to protect life outside of the building with members of my church. I also explained that Legacy had previously accommodated my religious beliefs in the family planning class. I explained how important the accommodation was to me and that other Legacy employees, such as Maria Cantu and Fernando Toro, Director of Clinical Services, were willing to work with me to find an appropriate accommodation for me. I let her know, for example, that Mr. Toro once suggested that we might be able to refer patients to other teachers to learn about birth control. This referral suggestion was never needed because of the other accommodation that Legacy provided instead.

I then asked Ms. Mondello if Legacy would continue my accommodation for this mandatory training at Planned Parenthood. After telling her that I had a moral objection to attending birth control training at Planned Parenthood, Ms. Mondello told me that she would talk to Ms. Leonard and get back with me. I thought that was the end of the issue.

On or around June 27, 2016, Ms. Mondello notified Ms. Leonard, the Vice President of the Public Health Department at Legacy, about my religious accommodation and reluctance to attend the Planned Parenthood training.

On June 28, 2016, Mr. Toro, the Director of Clinical Services, came into my office and told me he was confused about what Ms. Leonard had asked him earlier that morning. Ms. Leonard had approached Mr. Toro in their morning training and asked him if it was true he would “refer patients out.” When Mr. Toro asked me, at first I was confused too, so he decided to call Ms. Leonard and put her on speaker while I was in the room. He asked her again to clarify what she meant when she asked him earlier about referrals. She sounded upset and repeated the question. After he hung up, Mr. Toro and I were still confused, so I decided to call Ms. Leonard myself.

When I asked Ms. Leonard what was going on she told me that we needed to meet and “talk about my job description,” meaning she wanted to talk about the family planning class and my religious convictions. That is when I realized that she was going to take away my religious accommodation. I then called Ms. Mondello and told her about what had just happened, and I reported that I was being discriminated against for my religious beliefs. She told me she would have someone from Human Resources be present at that meeting.

June 29, 2016 Meeting

On June 29, 2016, when I arrived at work, I found an email from Ms. Leonard, scheduling a meeting that afternoon. It said that there would be a meeting at 1:30pm at Legacy’s Montrose location. The meeting also included Ms. Mondello, my supervisor, and Diana Dean, the Vice President of Human Resources. As I learned, the meeting had been called to terminate me.

When I walked in to the meeting and sat down, Ms. Leonard immediately made it clear that she was not interested in trying to work with me to find a religious accommodation. She was intent on firing me unless I would “put my aside my beliefs” and teach birth control methods that are squarely against my religious beliefs.

She said, “If you don’t put your religious beliefs aside, you can’t work here.” I started to cry and said, “I’m sorry, I can’t do that. My faith comes first. I really love my job and my patients, but I’m sorry. I can’t do what you are asking me to do.”

At the meeting, I brought proof of how well the accommodation was working. The first thing I showed them was the comment card from a patient who said that she learned a lot from the video curriculum. I explained to them that my religious beliefs were not affecting what my students were learning or causing Legacy hardship. The video curriculum that we used to accommodate my beliefs allowed Legacy to achieve its goals for a year and a half without any problems. Ms. Leonard immediately reacted, “No, no, that’s not valid,” without even looking at the comment card.

I then showed them records demonstrating just how minimal my accommodation had been and how beneficial it had been for Legacy. Almost all of my students were enrolled in other classes. The family planning class only met a total of three hours per

month. Even the Vice President of Human Resources, when she saw the student enrollment records, looked over at Ms. Leonard and said, “Really? We can’t accommodate her?” But Ms. Leonard was firm. She said no and that I had to personally teach the subject. She wasn’t interested in working with me to find an accommodation.

Finally, I explained that I was open to other kinds of accommodations. I let them know that there was at least one other employee who had volunteered to teach that small portion of the class for me so that there would be no hardship on Legacy. I explained that Ms. Guidry volunteered to substitute for me so that I would not be forced to violate my religious beliefs. I also mentioned that there were several employees and medical professionals on site who were able to answer any questions and concerns about birth control. But, Ms. Leonard refused to even consider giving me an accommodation. They offered no explanation at that meeting for why any solution I suggested as an accommodation wouldn’t work. Moreover, Ms. Leonard did not suggest any means to accommodate my religious beliefs.

Not only did Ms. Leonard refuse all accommodations options, she never explained to me how—or whether—any accommodation of my religious beliefs would harm Legacy. She was more concerned with me changing my religious beliefs than explaining how my beliefs affected Legacy. With so small a percentage of my job duties impacted, an accommodation that had worked smoothly without harm to Legacy for a year and a half, and a ready volunteer to cover the three hours per month to teach the birth control class, Legacy would not be placed in even minimal hardship.

Toward the end of the meeting, Ms. Leonard started insulting my religious beliefs, arguing that the beliefs I have held since I was a small child were wrong. She told me that she knows lots of other Catholics who use birth control, implying that I don’t understand my faith and that Catholicism does not require Catholics to be against birth control. I was shocked that my employer—the vice president for my department—would make comments to me or to my co-workers, openly demeaning and disparaging my Catholic beliefs, coercing me to “put aside my beliefs” in order to work there. Ms. Leonard repeated her ultimatum in the attached email. *See Attachment I (email from Ms. Leonard on June 29, 2016).*

Ms. Dean briefly suggested other positions in the company at the end of the meeting, but they were akin to a receptionist position and not comparable to the Health Educator position in skills required, salary, or substance. I said that I would do more research to see if there were other positions in the company that were appropriate, and I did look into other positions, such as a possible position in the marketing department. I found that that position would also require a religious accommodation, which Legacy did not appear likely to consider. Legacy did not give me time to try to work out an alternative. At the end of that meeting on June 29th, they let me know that I would be terminated.

They said that I would work as a Health Educator until the end of the month (July 2016), and that Ms. Mondello would teach the portion of the family planning class to

which I had an objection. But, the very next day, Ms. Dean told me that Legacy would only let me work there for another week, moving my last day to July 8, though they would pay me until the end of the month. *See Attachment I* (email from Ms. Dean on June 30, 2016).

After the Meeting

The day after the meeting, on June 30, 2016, I told some of my co-workers what had happened. I talked with Dr. Charu Sawhney, Clinical Site Director, and she told me she would talk to Ms. Leonard to see if she could accommodate my religious beliefs. I told her that in other clinics where I have worked they accommodated doctors and nurses who couldn't promote birth control, and I didn't understand why they couldn't do that at Legacy with me. Dr. Sawhney suggested that a nurse could teach that class and I told her how Aurdis Guidry, Registered Nurse, had volunteered to teach the class.

After talking with Ms. Leonard, Dr. Sawhney came into my office changed. She told me that "the Bible was written before birth control was invented," implying that my beliefs about my faith's most sacred text are wrong. I believe that she was repeating what Ms. Leonard had said to her and that Ms. Leonard had convinced her that my religious beliefs were false and not worthy of being accommodated.

In my final few days, I sent a few emails to Ms. Dean and Ms. Leonard requesting clarification about what was happening because I believed that I was being discriminated against because of my Catholic faith. I made it clear in the emails that this was not a mutual termination. *See Attachment J* (July 8, 2016 emails with Ms. Dean).

During my last week, sometime between July 5th and July 7th, I also called Ms. Dean on the telephone and reported to her that it was discrimination to revoke my religious accommodation. I told her that I couldn't believe what was going on. I asked what would happen if a doctor or a nurse requested a similar religious exemption (where they wouldn't promote birth control), and she exclaimed "We would not hire them!" At that point, it was clear that Ms. Dean could not help me and Legacy would not do anything to accommodate my religious beliefs—or any employee, or prospective employee, who might hold to a similar religious belief.

Exit Interview

I was terminated on July 8, 2016. My exit interview took place at 4:11 pm on my last day of work, July 8, 2016. Ms. Dean came into my office, asking to make sure that I understood the emails because she said the reason for my termination was in the emails. I asked her if there were any accommodations Legacy could do for me, and that all I was asking for was a reasonable accommodation for my religious beliefs. She told me that my job was to talk about the whole service including family planning. I told her that it was only about 2% of what I did, but she said that it was a large portion of my job. She started giving me examples of how if she were a history or science teacher she would have to teach topics that she didn't agree with. She indicated that she was familiar with ADA,

Title VII, and EEOC requirements, but, even when she doesn't agree with what they say, she still has to do enforce the policies of Legacy because that is her job.

I told her I did not understand why Legacy couldn't accommodate my religious beliefs. She said that "she couldn't accommodate me because it wasn't in the job description to accommodate anyone."

I asked her why Aurdis Guidry could not volunteer to teach the class for me, and she stated, without explaining how, that it would take away time from her job. This was the first time any reason was given to me. She then said that, maybe in the future, Legacy would expand and get another health educator that would specialize in prenatal care, car seat class, and family planning instead of teaching everything. Again, my exit interview was the first time I heard this.

Ms. Dean asked me to sign the "Employee Termination/Resignation" document, stating that it was an involuntary termination. I refused to sign because the document did not say why I was being terminated. She wrote "Refused to sign" and called Ms. Guidry into the office to initial the document. *See* Attachment K (employee termination document).

She ended the meeting saying that I was eligible for rehire, and she said that she would understand if I didn't want anything to do with Legacy. She said my performance in other areas was wonderful and that she knew it was a hard decision for me. She told me to go online next week if I wanted to apply in other positions at Legacy.

On my last day, some of my co-workers knew what happened and were sad to see me go. Many of them thought what happened to me was obviously discriminatory. That day, Dr. Carrie Chiu gave me a hug, started to cry, and told me what they had done to me was so wrong. My co-workers threw a going away party for me.

Post-Termination

After being fired by Legacy, I worked diligently to find a new job, searching almost every day for opportunities. I also checked Legacy's website for available positions, but only saw medical assistant and eligibility positions available. Those positions were not comparable to the health educator position. After weeks of searching, I was able to find a new position in health education at a different company.

Hostile Work Environment at Legacy

I am writing because I don't want what happened to me to happen to any other person of faith at Legacy. The environment at Legacy is not friendly to religious beliefs like mine and often antagonistic toward religious people, especially Catholics and other Christians. Other people at Legacy had similar experiences of hostility. If Legacy continues to not only refuse to accommodate Catholics like me, but allow its Vice Presidents to try to coerce employees like me into believing that their religious beliefs are

wrong, religious employees will continue to be marginalized and feel threatened by their employer.

Here are some examples of religious hostility:

- On January 6, 2014, we were celebrating Three Kings Day. That day Blanca Garza, previous Eligibility Director, asked if anyone wanted to pray with her during a break. I told her I would love to join her and a couple of other employees decided to join too. A coworker told us that if the management caught us praying we would get in trouble.
- Pamela Mosguera, MA, was once told by a supervisor or manager that she was not permitted to listen to Christian music on her phone or talk about God in the nurses/providers room after a doctor made a complaint.
- Maribel Davila, Front Desk, was told by a co-worker she could not talk about the Bible with another coworker, Ramona Colas, at work or they might get in trouble with the management. They were only around other co-workers, not patients, at the time.
- Carol Camper, previous Health Educator, stated that they did not allow her to keep anything religious on her desk or in the health education room even though other people were permitted to have personal items on their desks. It was only personal items related to religion that were banned.

Legacy has given a religious accommodation to at least one similarly situated employee, a Buddhist, but I am not aware of them giving religious accommodations to Catholics or other Christians. Natalie Leffall, Director of Internal Communications, saw one of Ms. Leonard's employees from the Public Health Department with candles inside a room. She went to talk to Ms. Leonard because she was concerned it was a fire hazard. Ms. Leonard told her the employee was Buddhist and that he needed candles to pray. Ms. Leonard told Ms. Leffall that Legacy needed to accommodate his Buddhist religious beliefs.

Legacy treated another similarly situated employee better than it treated me. I was informed that Legacy gave an accommodation to Dr. Larry Ceasar, a male pediatrician, allowing him to not treat anyone under 13 who was a female. I do not know why he was allowed such a variance from his job description, but I was not allowed a more minor religious accommodation.

On my last day at legacy, Maribel Davila, Front Desk, came into my office and told me I needed to speak up for those who had religious beliefs and were still working at Legacy otherwise nothing would change. Natalie Leffall, Director of Internal Communications, also encouraged me to report to the EEOC because I had been discriminated against based upon my religious beliefs and religious discrimination is against the stated core values of Legacy.

I want to make sure that Legacy is held accountable for its discriminatory behavior, including its failure to put forth any effort to accommodate my Catholic beliefs. I hope in the future it will accommodate, rather than just kicking people out who hold different beliefs.

Summary of Legacy's Unlawful Actions

In summary, Legacy acted unlawfully for several reasons. First, Ms. Leonard and Ms. Mondello knew that I required a religious accommodation and yet refused to work with me at all to try to seek out an appropriate accommodation. Under the Supreme Court's *Abercrombie* decision, a supervisor cannot immediately fire an employee after learning about a need for an accommodation just so that the company can avoid the possibility of having to accommodate the employee. *EEOC v. Abercrombie & Fitch Stores, Inc.*, 135 S. Ct. 2028, 2033 (2015) (holding "an employer who acts with the motive of avoiding accommodation may violate Title VII"). Instead, employers have a duty to accommodate the religious beliefs of their employees when it would not cause undue hardship. 42 U.S.C. § 2000e(j). Here, Ms. Leonard removed my long-standing religious accommodation, despite the fact that it caused Legacy no undue hardship, and then fired me without *any* good faith effort to consider another accommodation.

Ms. Leonard's improper motivation, her desire to avoid accommodating me, is shown by at least the following facts: (1) upon learning of my need for an accommodation, Ms. Leonard called me into a meeting in order to fire me if I did not "put my beliefs aside," rather than try to work out any problems with the existing accommodation; (2) Ms. Leonard made statements implying that *my* religious beliefs were incorrect interpretations of *her* understanding of Catholicism; (3) Ms. Leonard attempted to persuade me to change or put aside my beliefs rather than try to accommodate me; (4) Legacy initially told me that I would continue work as a Health Educator until the end of July, but then pushed up my last day to July 8, 2016 — just eleven days after Ms. Leonard learned of my need for an accommodation.

Next, it was discriminatory for Legacy to revoke my religious accommodation, without considering, much less providing, an alternative religious accommodation, especially when accommodating my beliefs had not caused, and would not cause, even minimal hardship on Legacy. At least three different kinds of religious accommodations were available to Legacy: (1) the previous video curriculum accommodation, (2) voluntary shift swaps, and (3) lateral transfers. The previous accommodation operated without even minimal hardship on Legacy for one and a half years. I also informed my supervisors that I was open to alternative accommodations. Under *Davis v. Fort Bend County*, 765 F.3d 480 (5th Cir. 2014), an employee's offer to voluntarily cover a shift is evidence that the burden on the company would be *de minimis*. See also 29 C.F.R. § 1605.2(d)(i). I told Ms. Leonard that at least one Legacy employee, Aurdis Guidry, R.N., was willing to teach the portion of the class for which I needed the accommodation. Such a teaching arrangement is feasible because, according to Diana Dean's email, Legacy planned to have Ms. Mondello teach the family planning course during July.

Next, I also informed my supervisors that other lateral positions within the company would be an appropriate accommodation. *See* 29 C.F.R. § 1605.2(d)(iii). Before being transferred to the Lyons location, my Health Educator position focused on chronic disease patients and did not include family planning courses. I would gladly have returned to such a position. I was also informed that Legacy intended to have Health Educators specialize, which I think could allow me to focus on topics such as chronic diseases that do not violate my religious beliefs. In the short time before I was terminated, I also sought out more information about other comparable positions within the company, such as reaching out to Lizzette Tienda to find out more information about a position in marketing. However, that position also would have necessitated a religious accommodation, which my employer was clearly unwilling to consider. No comparable positions were offered, and there was no good faith effort on the part of Legacy to match me with a position.

Third, I was retaliated against for requesting an accommodation and for explaining that it could be discriminatory to deny religious accommodations. I reported discrimination at least twice before being fired. First, in a phone call to Ms. Mondello on July 28, 2016, I asserted my rights, my need for a religious accommodation, and I said that I was being discriminated against because of my Catholic beliefs. I told her that it would be unlawful discrimination for Legacy to refuse any sort of religious accommodation. The next day, I was called into a meeting and informed that I had to “put my beliefs aside” or else be terminated. Later, sometime between July 5th and July 7th, I reported the religious discrimination to Ms. Dean by telephone. My last day was on July 8th, even though Legacy originally told me that I would be able to work through the end of July. I believe that my reporting religious discrimination caused or, at a minimum, expedited my termination in retaliation.

Fourth, the policy of not accommodating religious beliefs has a disparate impact on religious people. In my exit interview, Ms. Dean told me that that Legacy “couldn’t accommodate me because it wasn’t in the job description to accommodate anyone.” This policy has a clear disparate impact on people needing an accommodation. Moreover, if Legacy has a policy requiring all teachers to be able to personally teach all portions of all classes (even if a teacher does not in fact teach all classes and even if a *de minimis* religious accommodation is needed), that policy would have a disparate impact on people needing accommodations.

Finally, Legacy created a workplace hostile to religious beliefs. Ms. Leonard and Ms. Dean stated multiple times that I needed to “put aside my beliefs” in order to work at Legacy. Ms. Leonard made statements critical of my Catholic beliefs on birth control and urged me to adopt *her* understanding of *my* religious beliefs. I have reason to believe that Ms. Leonard made similar statements to Dr. Sawhney. Other Legacy employees, such as Tara Chappel and Maribel Davila, agree that Legacy is hostile toward religious people. The four separate incidents involving Blanca Garza, Pamela Mosguera, Maribel Davila, and Carol Camper, that were described earlier further demonstrate the hostility toward

religious belief, especially Catholic or Christian belief, that pervades the work environment.

Thank you very much for looking into what happened.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Karen' or 'Alexia', with a large, stylized loop at the end.

Karen (Alexia) Palma

ATTACHMENT A

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ATTACHMENT B

May 2016 Baby Shower

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

- ☒ Excelente
- ☐ Buena
- ☐ Más o Menos
- ☐ Malo

2. ¿La información fue fácil de entender? ☒ Sí ☐ No

3. La educadora de la clase fue:

- ☒ Dinámica
- ☐ Aburrida
- ☐ Irrespetuosa
- ☒ Fácil de entender
- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

Que Sirve mucho la información

5. ¿Hay algo que le gustaría cambiar de las clases? ☐ Sí ☒ No

Si respondió si, ¿Qué cambiaría? _____

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? ☒ Sí ☐ No

¿Qué temas? la Instalacion de la Silla

Procedimientos de que hacen en el Hospital.

¡Gracias por sus comentarios!



Community Health Services

EVALUATION OF THE "BECOMING A MOM" PROGRAM

Please, answer the following questions:

1. In general, how would you classify the Becoming a Mom classes?

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Bad

2. The information in the classes was easy to follow? Yes No

3. The class educator was:

- ☐ Dynamic
- ☐ Boring
- ☐ Disrespectful
- ☐ Easy to follow
- ☐ Well knowledgeable
- ☐ Encouraged me to ask questions

4. What did you like best about the classes?

5. Is there anything you would change about the classes? Yes No

If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

- ☒ Excelente
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2. ¿La información fue fácil de entender? ☒ Sí ☐ No

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- ☒ Dinámica
- ☐ Aburrida
- ☐ Irrespetuosa
- ☐ Fácil de entender
- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

fue la información por ser mamá primeriza lo que me gusto porque me oriento mucho.

5. ¿Hay algo que le gustaría cambiar de las clases? ☐ Sí ☒ No

Si respondió si, ¿Qué cambiaría? _____

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? ☒ Sí ☐ No ¿Qué temas? Alimentación

¡Gracias por sus comentarios!



Community Health Services

EVALUATION OF THE "BECOMING A MOM" PROGRAM

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If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

- ☒ Excelente
- ☐ Buena
- ☐ Más o Menos
- ☐ Malo

2. ¿La información fue fácil de entender? ☒ Sí ☐ No

3. La educadora de la clase fue:

- ☒ Dinámica
- ☐ Aburrida
- ☐ Irrespetuosa
- ☐ Fácil de entender
- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

la instructora.

5. ¿Hay algo que le gustaría cambiar de las clases? ☐ Sí ☒ No

Si respondió si, ¿Qué cambiaría?

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? ☒ Sí ☐ No ¿Qué temas?

Lactancia y dar Seat

¡Gracias por sus comentarios!



Community Health Services

EVALUATION OF THE "BECOMING A MOM" PROGRAM

Please, answer the following questions:

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If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUATION OF THE "BECOMING A MOM" PROGRAM

Please, answer the following questions:

1. In general, how would you classify the Becoming a Mom classes?

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- ☐ Bad

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- ☒ Dynamic
- ☐ Boring
- ☐ Disrespectful
- ☒ Easy to follow
- ☒ Well knowledgeable
- ☒ Encouraged me to ask questions

4. What did you like best about the classes?

Breastfeeding class - learned lots of new things.

5. Is there anything you would change about the classes? Yes ☐ No ☒

If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? ☒ Yes ☐ No What topics? Birth Control - there

were & somethings I didn't even know about.

Thank you for your comments!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

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- ☐ Malo

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- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

5. ¿Hay algo que le gustaría cambiar de las clases? Sí No

Si respondió si, ¿Qué cambiaría? _____

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? Sí No ¿Qué temas? _____

¡Gracias por sus comentarios!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

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- ☐ Irrespetuosa
- ☐ Fácil de entender
- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

la educación sobre una buena alimentación

5. ¿Hay algo que le gustaría cambiar de las clases? ☐ Sí ☒ No

Si respondió si, ¿Qué cambiaría? No, nada todo esta bien

me encantaron las clases que me dieron

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? ☒ Sí ☐ No

¿Qué temas? La nutrición

¡Gracias por sus comentarios!



Community Health Services

EVALUATION OF THE "BECOMING A MOM" PROGRAM

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5. Is there anything you would change about the classes? Yes No

If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

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- ☐ Más o Menos
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- ☐ Aburrida
- ☐ Irrespetuosa
- ☐ Fácil de entender
- ☐ Sabía bien de los temas
- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

que aprendi mucho sobre la los bb

5. ¿Hay algo que le gustaría cambiar de las clases? ☐ Sí ☒ No

Si respondió si, ¿Qué cambiaría? _____

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temás que no estaba familiarizada? ☒ Sí ☐ No

¿Qué temas? Si me ayudo mucho a

como sentar al bb correctamente y estar pendiente mucho a

¡Gracias por sus comentarios!



Community Health Services

EVALUATION OF THE "BECOMING A MOM" PROGRAM

Please, answer the following questions:

1. In general, how would you classify the Becoming a Mom classes?

- ☐ Excellent
- ☐ Good
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- ☐ Bad

2. The information in the classes was easy to follow? Yes No

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4. What did you like best about the classes?

5. Is there anything you would change about the classes? Yes No

If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUATION OF THE "BECOMING A MOM" PROGRAM

Please, answer the following questions:

1. In general, how would you classify the Becoming a Mom classes?

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- ☐ Bad

2. The information in the classes was easy to follow?

Yes

No

3. The class educator was:

- ☒ Dynamic
- ☐ Boring
- ☐ Disrespectful
- ☐ Easy to follow
- ☒ Well knowledgeable
- ☒ Encouraged me to ask questions

4. What did you like best about the classes?

Information

5. Is there anything you would change about the classes?

Yes

No

If yes, what would you change? _____

6. Do you think the classes have helped you gain knowledge in any topics that you was not familiar with? Yes No What topics? _____

Thank you for your comments!

EVALUACION DEL PROGRAMA "COMENZANDO BIEN"

Por favor, conteste las siguientes preguntas:

1. En general, ¿Cómo clasificaría las clases de Comenzando Bien?

- ☐ Excelente
- ☐ Buena
- ☐ Más o Menos
- ☐ Malo

2. ¿La información fue fácil de entender? Sí No

3. La educadora de la clase fue:

- ☐ Dinámica
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- ☐ Me alentó a hacer preguntas

4. ¿Qué es lo que más le gusto de las clases?

5. ¿Hay algo que le gustaría cambiar de las clases? Sí No

Si respondió si, ¿Qué cambiaría? _____

6. ¿Cree que las clases le ha ayudado en ganar conocimiento en temas que no estaba familiarizada? Sí No ¿Qué temas? _____

¡Gracias por sus comentarios!

ATTACHMENT C

Manager Ratings

Review Data

Review Code: **EE2014**

Job Title: **PATIENT EDUCATOR**

Due Date: **8/8/14**

Calculated Manager Rating: **Exceeds Expectations 3.53**

Status: **Final**

Performance Review Approvers: **[1]** Megdal, Martina

Review Manager: Cantu-Ondarza, Maria

Review Period

Start Date: **7/1/13**

End Date: **6/30/14**

Employee Data

Employee Code: **L00095**

Department: **Health Promotions**

First Name: **KAREN**

Manager Name: **CANTU-ONDARZA, MARIA E**

Last Name: **PALMA**

Start Date: **9/9/13**

Rating Scale Definitions

5 - Exceptional: Consistently demonstrates exceptional behaviors; serves as a role model and mentor.

4 - Exceeds Expectations: Consistently demonstrates effective behaviors and often demonstrates exceptional behaviors.

3 - Meets Expectations: Consistently demonstrates effective behaviors.

2 - Needs Development: Demonstrates some behaviors but not others, or uses behaviors inconsistently.

1 - Unsatisfactory: Rarely demonstrates behaviors; requires significant development.

Performance Review Rating Summary

Overall Score: 3.53

Review Section	Manager Score	Employee Score	Weight	Section Weighted Score
Standard Competencies	3.53	5.00	100.00%	3.53
• Competency - Professionalism	3.80	5.00		
• Competency-Customer Service	3.50	5.00		
• Competency - Diversity Commitment	3.75	5.00		
• Competency - Patient-Centered Care	3.33	5.00		
• Competency - Interpersonal & Communication Skills	3.50	5.00		
• Competency - Job Knowledge	3.60	5.00		
• Competency - Dependability	3.50	5.00		
• Competency - Teamwork	3.50	5.00		

Standard Competencies (Weight: 100.00%)

Exceeds Expectations 3.53

Description: **The competencies in this section apply to all employees at Legacy Community Health Services and are a baseline measure of performance.**

Competency - Professionalism

Exceeds Expectations 3.80

- Exceeds Expectations 4.00** Arrives on time and is prepared for work
- Exceeds Expectations 4.00** Meets the personal appearance standard
- Exceeds Expectations 4.00** Treats internal and external clients with respect
- Exceeds Expectations 4.00** Displays a commitment to carrying out all daily job responsibilities
- Meets Expectations 3.00** Accepts responsibility and is accountable

Manager Comments:

Karen commits to grow and learn all about her new position, she has been promoted to become a patient educator based on her credentials, professionalism, and experience. She interacts in a professional way and demonstrates respect for her patients and coworkers. Karen arrives to work well prepared and on time.

Competency-Customer Service

Exceeds Expectations 3.50

- Exceeds Expectations 4.00** Displays courtesy and sensitivity while meeting commitments
- Meets Expectations 3.00** Manages difficult situations with a calm demeanor
- Meets Expectations 3.00** Responds promptly to both internal and external customer needs
- Exceeds Expectations 4.00** Solicits customer feedback to improve service

Manager Comments:

Karen conducts herself with courtesy, patients had expressed that she is nice and cordial. Karen manages difficult situations with a clear and objective approach, and maintains a calm attitude. When conducting patient education the patient becomes an active participant, Karen has key questions and uses examples based on real events.

Competency - Diversity Commitment**Exceeds Expectations 3.75**

- Exceeds Expectations 4.00** Understands the value of different points of view
- Exceeds Expectations 4.00** Shows respect and sensitivity for cultural differences
- Meets Expectations 3.00** Educates others on the value of diversity
- Exceeds Expectations 4.00** Shows compassion and sensitivity to a diverse patient population

Manager Comments:

Karen interacts with others in a positive way, she is respectful of diversity and sensitive to cultural differences, important aspects of her performance is that she prepares her materials and content based on the patient's cultural, simple words can have different meanings to different cultures. Karen prepares her material in a way that patients will understand the concept.

Competency - Patient-Centered Care**Meets Expectations 3.33**

- Meets Expectations 3.00** Displays urgency and responsiveness to patient needs that supersedes self-interests
- Meets Expectations 3.00** Demonstrates the ability to call effectively on other resources in the system in order to provide optimal patient care
- Meets Expectations 3.00** Enters accurate data into the EMR system in a timely manner
- Exceeds Expectations 4.00** Respects and protects patient privacy and confidentiality and follows HIPPA regulations
- Exceeds Expectations 4.00** Shows compassion and sensitivity to a diverse patient population
- Meets Expectations 3.00** Seeks continuous personal learning and development to enhance patient care

Manager Comments:

Karen is well-organized and documents on EMR patients visit, she identifies patients' needs and refers patients to their provider, when the patient express personal issues and remembered things that were not shared with their provider previously . Patients feel confident and trust her. Karen makes sure that the information is kept private and communicates with the providers in a professional way.

Competency - Interpersonal & Communication Skills**Exceeds Expectations 3.50**

- Meets Expectations 3.00** Effectively expresses ideas and thoughts verbally and in written form
- Meets Expectations 3.00** Uses appropriate communication methods
- Exceeds Expectations 4.00** Listens to others well in order to understand and comprehend
- Meets Expectations 3.00** Keeps others adequately informed
- Exceeds Expectations 4.00** Contributes to a positive team spirit
- Exceeds Expectations 4.00** Demonstrates an open and responsive attitude toward feedback from team members, patients and peers and adjusts behavior accordingly

Manager Comments:

Karen takes initiative to coordinate activities;she has not only worked towards the Health Promotions team, she has also become a smover and conducted sessions for the LSW and LBR staff, she contributes directly to build the team spirit among Legacy LBR and LSW staff by promoting within the staff a soccer team.Karen is open to receive feedback and provide also constructive feedback to her team mates.

Competency - Job Knowledge**Exceeds Expectations 3.60**

- Exceeds Expectations 4.00** Competent in required job skills and knowledge
- Exceeds Expectations 4.00** Exhibits ability to learn and apply new skills
- Meets Expectations 3.00** Requires minimal supervision
- Meets Expectations 3.00** Uses resources effectively
- Exceeds Expectations 4.00** Displays understanding of how job relates to overall organizational goals

Manager Comments:

Karen is open to learn and seeks feedback when a new project and activity is part of her performance; with her previous experience and training she has become competent in her role as patient educator. She is always seeking for training, and taking advantage of the Webinar available.

Karen works independently, uses resources properly, and creates her own educational materials, she is well-organized.

Competency - Dependability**Exceeds Expectations 3.50**

- Exceeds Expectations 4.00** Responds to request for service and assistance in a timely manner
- Exceeds Expectations 4.00** Follows instruction and responds to management direction
- Meets Expectations 3.00** Takes responsibility for own actions
- Meets Expectations 3.00** Encourages other team members to be successful

Manager Comments:

Karen works independently, and communicates to her supervisor new ideas and ways to conduct education. I can count with when a new project and/or tasks are in place. She follows instructions and makes sure that she understands the expectations before implementing and seeks information on the "know how"

Karen is proactive with her team, she provides ideas, ask questions to her coworkers when she doesn't have the information and/ or skills.

Competency - Teamwork**Exceeds Expectations 3.50**

- Meets Expectations 3.00** Balances team and individual responsibilities
- Exceeds Expectations 4.00** Puts success of team above own interests
- Meets Expectations 3.00** Exhibits objectivity and openness to others' views
- Exceeds Expectations 4.00** Encourages other team members to be successful

Manager Comments:

Karen is a team player, objective and active contributor to patient education projects, and is willing to adjust her work hours based on the patients need and team work. Every time there is a project that needs to take place after hours she is willing to assist.

Competency - Safety & Security

Meets Expectations 3.33**Meets Expectations 3.00**

Adheres to safety and security procedures

Manager Comments:

Meets Expectations 3.00

Consistently uses equipment and materials properly

Karen follows procedures and is prompt to report issues; she uses properly resources and materials.

Exceeds Expectations 4.00

Reports potentially unsafe conditions

Overall Comments

Manager Comments: Karen, you are a great team player, always seeking to learn, and contribute in many ways to accomplish new tasks for the Health Promotions department. You are committed to help the patients to accomplish a healthy life style. I appreciate all what you do for the patients and the company.

Employee Comments: I have been working at Legacy for 10 months now, and I feel very happy to be part of the Health Promotion team! I enjoy working with all my coworkers and helping patients meet their health goals!

Review Sign Off:

Manager Signature: **Maria E Cantu- Ondarza**Employee Signature: **Karen Palma**Manager Signature Date: **8/4/14**Employee Signature Date: **7/18/14**

Employee Ratings

Review Data

Review Code: **EE2014**

Review Manager: Cantu-Ondarza, Maria

Due Date: **8/8/14**Job Title: **PATIENT EDUCATOR**Status: **Final**Calculated Employee Rating: **Exceptional 5.00**

Employee Data

Employee Code: **L00095**Department: **Health Promotions**First Name: **KAREN**Manager Name: **CANTU-ONDARZA, MARIA E**Last Name: **PALMA**Start Date: **9/9/13**

Rating Scale Definitions

5 - Exceptional: Consistently demonstrates exceptional behaviors; serves as a role model and mentor.**4 - Exceeds Expectations:** Consistently demonstrates effective behaviors and often demonstrates exceptional behaviors.

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1 - Unsatisfactory: Rarely demonstrates behaviors; requires significant development.

Standard Competencies **(Weight: 100.00%)**

Exceptional 5.00

Description: **The competencies in this section apply to all employees at Legacy Community Health Services and are a baseline measure of performance.**

Competency - Professionalism

Exceptional 5.00

- Exceptional 5.00** Arrives on time and is prepared for work
- Exceptional 5.00** Meets the personal appearance standard
- Exceptional 5.00** Treats internal and external clients with respect
- Exceptional 5.00** Displays a commitment to carrying out all daily job responsibilities
- Exceptional 5.00** Accepts responsibility and is accountable

Employee Comments

I love what I do and always make sure to give it my best. I like to do more than what is expected of me. I always respect my coworkers and the patients that come to Legacy. I do not like to be late to work and show up early. I take my work seriously. I make sure to always be compassionate and professional at work.

Competency-Customer Service

Exceptional 5.00

- Exceptional 5.00** Displays courtesy and sensitivity while meeting commitments
- Exceptional 5.00** Manages difficult situations with a calm demeanor
- Exceptional 5.00** Responds promptly to both internal and external customer needs
- Exceptional 5.00** Solicits customer feedback to improve service

Employee Comments

Sometimes I get patients who come to their appointment and have concerns. I make sure to help them as much as I can or direct them to the right department. I am courteous and compassionate with every patient and coworker that comes in to the clinic.

Competency - Diversity Commitment**Exceptional 5.00**

- Exceptional 5.00** Understands the value of different points of view
- Exceptional 5.00** Shows respect and sensitivity for cultural differences
- Exceptional 5.00** Educates others on the value of diversity
- Exceptional 5.00** Shows compassion and sensitivity to a diverse patient population

Employee Comments

Here at Legacy we see patients from different backgrounds and cultures. I always make sure to take that into consideration because it does affect patient's care. When I teach basic nutrition I have to make sure to take into consideration where the person is from because people eat and have different kinds of dishes all around the world. It is important for me to always respect the different beliefs and backgrounds that other people may have.

Competency - Patient-Centered Care**Exceptional 5.00**

- Exceptional 5.00** Displays urgency and responsiveness to patient needs that supersedes self-interests
- Exceptional 5.00** Demonstrates the ability to call effectively on other resources in the system in order to provide optimal patient care
- Exceptional 5.00** Enters accurate data into the EMR system in a timely manner
- Exceptional 5.00** Respects and protects patient privacy and confidentiality and follows HIPPA regulations
- Exceptional 5.00** Shows compassion and sensitivity to a diverse patient population
- Exceptional 5.00** Seeks continuous personal learning and development to enhance patient care

Employee Comments

I always make sure to follow HIPPA regulations and keep confidential anything regarding a patient outside of work. When I document in a patient's chart I always make sure to double check for grammar. I am very big on patient centered care because the patient always comes first.

Competency - Interpersonal & Communication Skills**Exceptional 5.00**

- Exceptional 5.00** Effectively expresses ideas and thoughts verbally and in written form
- Exceptional 5.00** Uses appropriate communication methods
- Exceptional 5.00** Listens to others well in order to understand and comprehend
- Exceptional 5.00** Keeps others adequately informed
- Exceptional 5.00** Contributes to a positive team spirit
- Exceptional 5.00** Demonstrates an open and responsive attitude toward feedback from team members, patients and peers and adjusts behavior accordingly

Employee Comments

Communication is so important to me. It could be making sure to communicate with a MD regarding a patient's concern or just being there for a coworker. I do consider myself positive and always trying to find ways to bring new ideas at work.

Competency - Job Knowledge

Exceptional 5.00

- Exceptional 5.00** Competent in required job skills and knowledge
- Exceptional 5.00** Exhibits ability to learn and apply new skills
- Exceptional 5.00** Requires minimal supervision
- Exceptional 5.00** Uses resources effectively
- Exceptional 5.00** Displays understanding of how job relates to overall organizational goals

Employee Comments

My previous job experience and educational background has helped me become a great health educator. I know I will always learn something new each day and I make sure to continue reading and look for more resources to be up to date in what I teach. When in doubt I do not hesitate to ask my coworkers.

Competency - Dependability

Exceptional 5.00

- Exceptional 5.00** Responds to request for service and assistance in a timely manner
- Exceptional 5.00** Follows instruction and responds to management direction
- Exceptional 5.00** Takes responsibility for own actions
- Exceptional 5.00** Encourages other team members to be successful

Employee Comments

I like to get things done on time and do more than what is expected of me. I always try to make sure my work gets done perfectly. I like to get things done before my supervisor has to tell me.

I love to encourage my coworkers to be successful and especially when they have done something outstanding I make sure to take my time to compliment them.

Competency - Teamwork

Exceptional 5.00

- Exceptional 5.00** Balances team and individual responsibilities
- Exceptional 5.00** Puts success of team above own interests
- Exceptional 5.00** Exhibits objectivity and openness to others' views
- Exceptional 5.00** Encourages other team members to be successful

Employee Comments

I am good at working as a team and making others feel great about themselves. I will always be open to help anyone that may need it. I enjoyed being a smoderator because it allowed me to spread positive attitude to others, help others, and encourage my coworkers to work as a team.

Competency - Safety & Security

Exceptional 5.00

Exceptional 5.00 Adheres to safety and security procedures

Employee Comments

Exceptional 5.00 Consistently uses equipment and materials properly

Even though our department is not clinical, if I see anything broken or wrong I make sure to report it to a supervisor or my boss.

Exceptional 5.00 Reports potentially unsafe conditions

Employee Goals **(Section calculation excluded):**

No employee goals are available for this review

Overall Comments

Employee Comments: I have been working at Legacy for 10 months now, and I feel very happy to be part of the Health Promotion team! I enjoy working with all my coworkers and helping patients meet their health goals!

Review Sign Off:

Employee Signature: **Karen Palma**

Employee Signature Date: **7/18/14**

Manager Ratings

Review Data

Review Code: **EE2015**

Job Title: **PATIENT EDUCATOR**

Due Date: **8/14/15**

Calculated Manager Rating: **Exceeds Expectations 4.00**

Status: **Final**

Performance Review Approvers: **[1] Parker Jr, John**

Review Manager: Toro, Fernando

Review Period

Start Date: **7/1/14**

End Date: **6/30/15**

Employee Data

Employee Code: **L00095**

Department: **Public Health Services**

First Name: **KAREN**

Manager Name: **TORO, FERNANDO**

Last Name: **PALMA**

Start Date: **9/9/13**

Rating Scale Definitions

5 - Exceptional: Consistently demonstrates exceptional behaviors; serves as a role model and mentor.

4 - Exceeds Expectations: Consistently demonstrates effective behaviors and often demonstrates exceptional behaviors.

3 - Meets Expectations: Consistently demonstrates effective behaviors.

2 - Needs Development: Demonstrates some behaviors but not others, or uses behaviors inconsistently.

1 - Unsatisfactory: Rarely demonstrates behaviors; requires significant development.

Performance Review Rating Summary

Overall Score: 4.00

Review Section	Manager Score	Employee Score	Mgmt. Avg	Peer Avg	Weight	Section Weighted Score
Standard Competencies	4.00	4.75			100.00%	4.00
• Diversity Commitment	4.00	4.80				
• Communications	4.00	4.40				
• Customer Service	4.00	5.00				
• Job Knowledge	4.00	4.67				
• Dependability	4.00	4.83				
• Teamwork	4.00	4.80				

Standard Competencies **(Weight: 100.00%)**

Exceeds Expectations 4.00

Description: **The competencies in this section apply to all employees at Legacy Community Health Services and**

are a baseline measure of performance.

Diversity Commitment

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Demonstrates knowledge of EEO policy
- Exceeds Expectations 4.00** Shows respect and sensitivity for cultural differences
- Exceeds Expectations 4.00** Educates others on the value of diversity
- Exceeds Expectations 4.00** Promotes a harassment-free environment
- Exceeds Expectations 4.00** Builds a diverse workforce

Manager Comments:

Karen's compassion is strengthened by her genuine ability to accept others indiscriminately. She does a great job working with the Lyons patient load which is very diverse. The diversity of the organization continues to expand because of her contributions.

Communications

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Expresses ideas and thoughts verbally
- Exceeds Expectations 4.00** Expresses ideas and thoughts in written form
- Exceeds Expectations 4.00** Exhibits good listening and comprehension
- Exceeds Expectations 4.00** Keeps others adequately informed
- Exceeds Expectations 4.00** Selects and uses appropriate communication methods

Manager Comments:

Karen displays very good verbal skills, communicating clearly and concisely, she exhibits good listening skills and comprehends complex matters well. Karen is attentive to keep others informed in a timely manner.

Customer Service

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Displays courtesy and sensitivity
- Exceeds Expectations 4.00** Manages difficult or emotional customer situations
- Exceeds Expectations 4.00** Meets commitments
- Exceeds Expectations 4.00** Responds promptly to customer needs
- Exceeds Expectations 4.00** Solicits customer feedback to improve service

Manager Comments:

Karen shows a high degree of respect for customers through her courtesy and sensitivity and often goes out of her way to make sure her commitments are met. She responds with a strong sense of urgency and compassion when servicing customers.

Job Knowledge

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Competent in required job skills and knowledge
- Exceeds Expectations 4.00** Exhibits ability to learn and apply new skills
- Exceeds Expectations 4.00** Keeps abreast of current developments
- Exceeds Expectations 4.00** Requires minimal supervision
- Exceeds Expectations 4.00** Displays understanding of how job relates to others
- Exceeds Expectations 4.00** Uses resources effectively

Manager Comments:

Karen does an excellent job of keeping herself updated about current developments in her field. She needs a minimal amount of supervision to fulfill her responsibilities and displays a better than usual understanding of the interrelationship between her job and the jobs of others.

Dependability

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Responds to requests for service and assistance
- Exceeds Expectations 4.00** Follows instructions, responds to management direction
- Exceeds Expectations 4.00** Takes responsibility for own actions
- Exceeds Expectations 4.00** Commits to doing the best job possible
- Exceeds Expectations 4.00** Keeps commitments
- Exceeds Expectations 4.00** Meets attendance and punctuality guidelines

Manager Comments:

Karen shows dependability by beginning work on time and keeping absences to a minimum. She always fulfills her commitments on schedule and can be depended upon to respond quickly and courteously when she receives requests for service and assistance.

Teamwork

Exceeds Expectations 4.00

- Exceeds Expectations 4.00** Balances team and individual responsibilities
- Exceeds Expectations 4.00** Exhibits objectivity and openness to others' views
- Exceeds Expectations 4.00** Gives and welcomes feedback
- Exceeds Expectations 4.00** Contributes to building a positive team spirit
- Exceeds Expectations 4.00** Puts success of team above own interests

Manager Comments:

Karen does an fantastic job of balancing the needs of the team with her individual responsibilities. She works diligently to build a positive team spirit and keeps the success of the team in the forefront of all her actions.

Overall Comments

Manager Comments: Karen is an effective communicator and great team player. She often steps outside her realm for the benefit of all clinic patients. She has been a great asset to the Lyons team. I applaud her enthusiasm and constant efforts in meeting the need of the patients and staff alike.

Employee Comments: I truly enjoy working at Legacy. I feel the past two years I have grown professionally and I plan to continue learning so that I me the best at what I do. I work hard and treat patients/coworkers with much love and respect. I know I need to continue education and that is one of my biggest goals to get my Masters Degree. I have been working about 5 months at LLC and this has been the best clinic I have ever worked in. I know there will always be small issues at a job, but I love how everyone here works as a team. I feel I have tremendous support from our director and that helps me a lot! I am grateful for the opportunity of being part of the Legacy family!

Review Sign Off:

Manager Signature: **Fernando Toro**

Employee Signature: **Karen Palma**

Manager Signature Date: 7/27/15

Employee Signature Date: 7/23/15

Employee Ratings

Review Data

Review Code: **EE2015**

Review Manager: Toro, Fernando

Due Date: **8/14/15**

Job Title: **PATIENT EDUCATOR**

Status: **Final**

Calculated Employee Rating: **Exceptional 4.75**

Employee Data

Employee Code: **L00095**

Department: **Public Health Services**

First Name: **KAREN**

Manager Name: **TORO, FERNANDO**

Last Name: **PALMA**

Start Date: **9/9/13**

Rating Scale Definitions

5 - Exceptional: Consistently demonstrates exceptional behaviors; serves as a role model and mentor.

4 - Exceeds Expectations: Consistently demonstrates effective behaviors and often demonstrates exceptional behaviors.

3 - Meets Expectations: Consistently demonstrates effective behaviors.

2 - Needs Development: Demonstrates some behaviors but not others, or uses behaviors inconsistently.

1 - Unsatisfactory: Rarely demonstrates behaviors; requires significant development.

Standard Competencies (Weight: 100.00%)

Exceptional 4.75

Description: **The competencies in this section apply to all employees at Legacy Community Health Services and are a baseline measure of performance.**

Diversity Commitment

Exceptional 4.80

Exceptional 5.00

Demonstrates knowledge of EEO policy

Employee Comments

Exceptional 5.00

Shows respect and sensitivity for cultural differences

At Legacy we work with a diverse population. Not only are our patients, but also our coworkers. I think it is very important to always take into consideration the different diversities in my work.

Exceeds Expectations 4.00

Educates others on the value of diversity

Exceptional 5.00

Promotes a harassment-free environment

Exceptional 5.00

Builds a diverse workforce

Communications

Exceeds Expectations 4.40

- Exceeds Expectations 4.00** Expresses ideas and thoughts verbally
- Exceeds Expectations 4.00** Expresses ideas and thoughts in written form
- Exceptional 5.00** Exhibits good listening and comprehension
- Exceptional 5.00** Keeps others adequately informed
- Exceeds Expectations 4.00** Selects and uses appropriate communication methods

Employee Comments

Communication is so important especially working in the healthcare industry. I always make sure to keep my boss informed of any changes. Regarding patients, I make sure to always have good communication with the providers, nurses, and other staff to make sure all the patients needs get done.

Customer Service

Exceptional 5.00

- Exceptional 5.00** Displays courtesy and sensitivity
- Exceptional 5.00** Manages difficult or emotional customer situations
- Exceptional 5.00** Meets commitments
- Exceptional 5.00** Responds promptly to customer needs
- Exceptional 5.00** Solicits customer feedback to improve service

Employee Comments

Every day at work I display courtesy and sensitivity to anyone I come across. I make sure that I provide excellent customer service to our patients. I also make them feel that even though they are no longer taking classes with me they can always count on me. I've had a mother come to me to report abuse just because she felt comfortable and knew I would get her to where she needed to go. I also have patients stop by after seeing me just to help them with paperwork.

Job Knowledge

Exceptional 4.67

- Exceeds Expectations 4.00** Competent in required job skills and knowledge
- Exceptional 5.00** Exhibits ability to learn and apply new skills
- Exceeds Expectations 4.00** Keeps abreast of current developments
- Exceptional 5.00** Requires minimal supervision
- Exceptional 5.00** Displays understanding of how job relates to others
- Exceptional 5.00** Uses resources effectively

Employee Comments

I believe that in any job position that you may have it is always important to continue getting education and being updates with new changes. We can always continue learning in what we do. I like to reach out to my coworkers when I am not sure of a situation.

Dependability

Exceptional 4.83

Exceeds Expectations 4.00

Responds to requests for service and assistance

Employee Comments

Exceptional 5.00

Follows instructions, responds to management direction

I know I can be dependable to get my job done. I know what my responsibilities are and make sure they are done on a timely manner. I

Exceptional 5.00

Takes responsibility for own actions

am not perfect, but when I have made a mistake I will own up to it and let my boss know what

Exceptional 5.00

Commits to doing the best job possible

happened. I will always do more than what is expected of me.

Exceptional 5.00

Keeps commitments

Exceptional 5.00

Meets attendance and punctuality guidelines

Teamwork

Exceptional 4.80

Exceeds Expectations 4.00

Balances team and individual responsibilities

Employee Comments

Exceptional 5.00

Exhibits objectivity and openness to others' views

Teamwork is so important. I have shown I work as a team not only in my department, but in every department. With the very little time I have a LLC I have already built good relationships with every department and I make sure to let them know I am here for them as well. My coworkers at Legacy have already told me I am very cheerful and giving.

Exceptional 5.00

Gives and welcomes feedback

Exceptional 5.00

Contributes to building a positive team spirit

Exceptional 5.00

Puts success of team above own interests

Employee Goals (Section calculation excluded):

No employee goals are available for this review

Overall Comments

Employee Comments: I truly enjoy working at Legacy. I feel the past two years I have grown professionally and I plan to continue learning so that I me the best at what I do. I work hard and treat patients/coworkers with much love and respect. I know I need to continue education and that is one of my biggest goals to get my Masters Degree. I have been working about 5 months at LLC and this has been the best clinic I have ever worked in. I know there will always be small issues at a job, but I love how everyone here works as a team. I feel I have tremendous support from our director and that helps me a lot! I am grateful for the opportunity of being part of the Legacy family!

Review Sign Off:

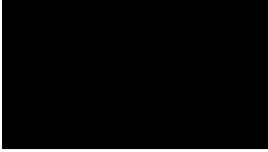
Employee Signature: **Karen Palma**

Employee Signature Date: **7/23/15**

ATTACHMENT D

Marlene Cohn

Registered Nurse, Family Practice



July 19, 2016

To whom it may concern,

I had the great pleasure of working closely with Karen Palma at Legacy Lyons clinic for over a year. We regularly collaborated to ensure the best quality outcomes for high risk patients with medical conditions which may be managed with lifestyle modifications, such as diabetes, hypertension, and high cholesterol. I can state with no doubt or hesitation that critical health outcomes would have tremendously suffered without Karen's tireless dedication to her patients. She went above and beyond, rarely taking personal breaks, encouraging walk in patients despite having a full schedule, identifying barriers to care which may have been missed by clinical staff, connecting patients to vital social and financial resources, and engaged the entire healthcare team to provide holistic care to a vulnerable population.

Should you hire Karen, you will be gaining an exceptionally compassionate and dedicated team member whose practice embodies the concept of patient centered care.

Sincerely,

A handwritten signature in black ink that reads "Marlene Cohn".

Marlene Cohn, RN

July 20, 2016

Personal Letter of Reference for Ms. Karen Palma.

Dear Sir or Madam:

I am pleased to write this letter of recommendation for Karen Palma. I met Ms. Palma when she came to Legacy Lyons Clinic to serve as Patient Educator in March 2015. Since then, I had the privilege of working with her as a member of our team. Among many tasks, she was primarily responsible for the patient education of our mothers to be, conducting Initial Maternity classes and coached high risk patients such as those in need of diabetes management and patients with hypertension.

For Ms. Palma, her work is her vocation. She uphold the values of excellence, respect and accountability. She was admired as a champion of compassion towards the patients and was voted employee of the month. Our clinic's patient satisfaction scores improved dramatically during her tenure and she made extraordinary efforts to help in the recruitment of new patients.

Overall, I highly recommend Karen Palma without reservation. She is passionate, dedicated and holds herself to high standards.

If I can provide additional information, please contact me.



Fernando Toro



To Whom It May Concern:

July 26, 2016

I'm writing this letter in reference to Karen Palma. I have worked with Karen for approximately two and half years as the Clinic Operation Manger. She worked as our Patient Educator for a busy Community Health Center.

Karen is organized and efficient as well as kind and caring. She is one of the most trustworthy individuals that I have every worked with. She always goes above and beyond the scope of her job description to make sure the patients are cared for.

I cannot recommend her more highly for any position for which she is applying. Please feel free to contact me if you have any additional questions.

Sincerely,

Tara J. Chappel

A solid black rectangular box used to redact the signature of Tara J. Chappel.

ATTACHMENT E

Karen Palma

From: Ramona Colas
Sent: Tuesday, June 14, 2016 11:00 PM
To: Karen Palma; Marcel Thompson
Subject: RE: Prenatal nutrition

Hi Karen,
Just a little behind on my emails. I want to thank you for all you do with the moms. They really enjoy your classes and tell me so. I will encourage the Nutrition class as many of our patients truly need education on proper nutrition during pregnancy.
Thank you again! You are awesome.
Ramona

Ramona Colas

Midwife
Legacy Community Health
Lyons Clinic
5602 Lyons Ave.
Houston, TX 77020

PH [REDACTED]
legacycommunityhealth.org



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From: Karen Palma
Sent: Tuesday, June 07, 2016 9:09 AM
To: Marcel Thompson; Ramona Colas
Subject: Prenatal nutrition

Dr. Thompson & Ramona

Good morning. I wanted to see if you both could help encourage all the mothers that come for prenatal care to take at least the prenatal nutrition class. I'm coming across a lot of mothers that just need help on basic nutrition. They always end up telling me that the nutrition class is their favorite class because they learn not only to maintain a healthy pregnancy, but to get their children to eat healthy.
I'm realizing that if you encourage them to take the class they will show up.
Thank you both! Our mothers always have wonderful things to say about you both in the prenatal classes.

Karen Palma

Patient Educator
Legacy Community Health
Lyons Clinic
5602 Lyons Ave.
Houston, TX 77020



legacycommunityhealth.org



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Karen Palma

From: Elizabeth Mondello
Sent: Friday, June 10, 2016 10:34 AM
To: Karen Palma
Subject: Dr. Sawhney

Hi Karen,


I hope you are having a nice Friday! I was on a call with Dr. Sawhney yesterday and she was talking about how impressed she was with your work!

Keep it up!

Thanks,

Elizabeth Mondello

Director - Public Health Services
Legacy Community Health
Montrose Clinic
1415 California Street
Houston, TX 77006


legacycommunityhealth.org



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ATTACHMENT F

You are one
persons' pros and cons really do have a
Thanks for being happy
I THANK you that! in checking any of them 144

you have such a warm
coming spirit: a beaut
Thanks for be
♡- Brey

Karen
Beautiful
Spirit,
Helps out anyone
in the clinic.
Very resourceful.
Happy all the time!
Thanks for being happy.

Kristina,
Is a hard
worker. She comes
of her office
anyone! Thanks for

Beyannah
Thank you for keeping
adult medicine running
smooth
Thanks for being happy.

Mrs. Guidry,
Thank you for
Awesome, love
Thanks for

Thanks for being happy.

Props to Karen who is 100% devoted
to her patients and goes above
and beyond to take care of the
WHOLE patient, not just the one thing
they came to her for!

Thanks for being happy.

ATTACHMENT G

March 2016

Class	B		T		a%
	R	A	R	A	
Arts & Crafts					#DIV/0!
Baby Shower MOMS	7	6	7	6	85.71%
Baby Shower Relatives	2	2	2	2	100.00%
Becoming a Mom #1	10	6	10	6	60.00%
Becoming a Mom # 2	4	3	4	3	75.00%
Becoming a Mom # 3	2	2	2	2	100.00%
Becoming a Mom # 4	7	5	7	5	71.43%
Breastfeeding	3	3	3	3	100.00%
Car Seat Safety	24	19	24	19	79.17%
Diabetes Class	41	41	41	41	100.00%
Family Planning	3	2	3	2	66.67%
Glucose Intolerance					#DIV/0!
General Nutrition Education	10	10	10	10	100.00%
General High Lips(Cholesterol)	26	26	26	26	100.00%
High Blood Pressure	24	24	24	24	100.00%
Maternity Registration (IM class)	8	8	8	8	100.00%
Safe Sleep	15	12	15	12	80.00%
STD/HIV Prevention					#DIV/0!
WeCan	5	5	5	5	100.00%
					#DIV/0!
Grand Totals	191	174	191	174	91.10%
Attendance Rate	0.91		0.91		

BAM

Average	Average	%
REG	Atten	Rate

BAM 1

BAM 2

BAM 3

BAM 4

0	0	#DIV/0!
---	---	---------

April 2016

Class	I		T		a%
	R	A	R	A	
Arts & Crafts					#DIV/0!
Baby Shower MOMS					#DIV/0!
Baby Shower Relatives					#DIV/0!
Becoming a Mom #1	6	6	6	6	100.00%
Becoming a Mom # 2	17	15	17	15	88.24%
Becoming a Mom # 3	8	6	8	6	75.00%
Becoming a Mom # 4	10	9	10	9	90.00%
Breastfeeding	7	7	7	7	100.00%
Car Seat Safety	36	31	36	31	86.11%
Diabetes Class	27	27	27	27	100.00%
Family Planning	10	8	10	8	80.00%
Glucose Intolerance					#DIV/0!
General Nutrition Education	2	2	2	2	100.00%
General High Lips(Cholesterol)	20	20	20	20	100.00%
High Blood Pressure	14	14	14	14	100.00%
Maternity Registration (IM class)	10	10	10	10	100.00%
Safe Sleep	11	7	11	7	63.64%
STD/HIV Prevention					#DIV/0!
WeCan	10	10	10	10	100.00%
					#DIV/0!
Grand Totals	188	172	188	172	91.49%
Attendance Rate	0.91		0.91		

BAM

Average	Average	%
REG	Atten	Rate

BAM 1
BAM 2
BAM 3
BAM 4

0 0 #DIV/0!

May 2016

Program	BAM		T		a%
	R	A	R	A	
Arts & Crafts					#DIV/0!
Baby Shower MOMS	11	7	11	7	63.64%
Baby Shower Relatives	6	6	6	6	100.00%
Becoming a Mom #1	12	6	12	6	50.00%
Becoming a Mom # 2	4	2	4	2	50.00%
Becoming a Mom # 3	7	2	7	2	28.57%
Becoming a Mom # 4	1	1	1	1	100.00%
Breastfeeding	8	4	8	4	50.00%
Car Seat Safety	17	12	17	12	70.59%
Diabetes Class	36	36	36	36	100.00%
Family Planning	4	2	4	2	50.00%
Glucose Intolerance					#DIV/0!
General Nutrition Education	4	4	4	4	100.00%
General High Lips(Cholesterol)	27	27	27	27	100.00%
High Blood Pressure	19	19	19	19	100.00%
Maternity Registration (IM class)	4	4	4	4	100.00%
Safe Sleep	11	8	11	8	72.73%
STD/HIV Prevention					#DIV/0!
WeCan	7	7	7	7	100.00%
					#DIV/0!
Grand Totals	178	147	178	147	82.58%
Attendance Rate	0.83		0.83		

BAM

Average	Average	%
REG	Atten	Rate

BAM 1

BAM 2

BAM 3

BAM 4

0

0 #DIV/0!

ATTACHMENT H

Job Description

Job Title:	Patient Educator	Job Code:
Reports to:	Director of Health Promotions	Revision Date: March 2014
Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Unscheduled Part Time (UPT) <input type="checkbox"/> Part-time <input type="checkbox"/> Temporary <input type="checkbox"/> Holidays <input type="checkbox"/> Evenings/Weekends		Position Classification: <input type="checkbox"/> Exempt (not eligible for overtime) <input checked="" type="checkbox"/> Hourly (eligible for overtime) Hours of Duty: _____

GENERAL DESCRIPTION

The Patient Educator will develop and lead classes in relation to new born care, car seat safety, diabetes, blood pressure, cholesterol, family planning, women's health and men's health. In addition, the Patient Educator will collaborate and coordinate with different agencies to expand on-site educational services for Legacy.

ESSENTIAL FUNCTIONS

Essential functions are those tasks, duties, and responsibilities that comprise the means of accomplishing the job's purpose and objectives. Essential functions are critical or fundamental to the performance of the job. They are the major functions for which the person in the job is held accountable.

- Develop, implement and/or educate patients about prenatal care; new born care; breastfeeding; car seat safety; diabetes self-management, control of high blood pressure and cholesterol; family planning, women's health, men's health, etc.
- Educate children and parents of the risks of obesity and how to practice healthy eating and active living.
- Teach patient self-management skills to improve their health and prevent complications.
- Work closely with the health care team to establish effective referral processes and to provide integrated health care services.
- Develop and/or conduct presentations to patients within the clinic and at local community sites.
- Participate in agency and local health fairs by conducting health screenings and providing educational information/materials as needed.
- Collaborate and coordinate with different agencies to expand on-site educational services for Legacy patients.
- Prepare and/or distribute health education materials, including reports, bulletins, and visual aids such as films, videotapes, photographs, flyers and posters.
- Prepare schedule of classes and materials on time.
- Work with the Director of Health Promotions to establish evidenced-based patient education and health promotion programs/services.
- Maintain updated teaching materials and have materials available.

- Collect and report monthly statistics and other reports as requested.
- Maintain databases, mailing lists, telephone networks, and other information to facilitate the functioning of patient education programs.
- Conduct quality assurance/improvement activities regarding services provided.
- Follow established Legacy Community Health Services policies and procedures.

AGE RELATED COMPETENCIES

Definitions of Age Specific Groups:

- *Neonate: Birth – 24 months*
- *Child: 2-12 years*
- *Adolescent: 13-17 years*
- *Adult: 18-64 years*
- *Geriatric: 65 years and beyond*
- *NA: Non-age specific*

Populations Served for this position:

☐ Neonate ☒ Child ☒ Adolescent ☒ Adult ☒ Geriatric ☐ NA

EDUCATION & TRAINING REQUIREMENTS

- Must have a Bachelor's degree related to Health Education, Nutrition or related field. Masters preferred.

WORK EXPERIENCE REQUIREMENTS

- Must possess demonstrated ability to relate to individuals and families of varied ethnic, cultural backgrounds, ages and economic circumstances.
- Must be bilingual in English and Spanish.
- Excellent oral and written communication skills.
- Ability to conduct group educational programs.
- Ability to speak in public.
- Works well independently and as a Team member.
- Must have a valid driver's license and transportation.
- Good knowledge of interviewing and recording techniques of the surrounding community; program policies; and some knowledge of health issues and health care systems.
- Experience coordinating community resources
- Experience working with MS Access and MS Excel
- Ability to conduct health screenings.
- Ability to participate in health fairs.

ESSENTIAL FUNCTIONS – PHYSICAL & MENTAL REQUIREMENTS

Note: Reasonable accommodations may be made for individuals with disabilities to perform the essential functions of this position.

- Frequently required to sit; occasionally required to stand and walk.
- Occasionally required to reach with hands and arms.
- Frequently required to talk or hear.
- Occasionally required to lift and/or move up to 25 pounds.
- Occasionally required to bend, twist or climb.
- Moderate concentration/intensity, which includes prolonged mental effort with limited opportunity for breaks.
- Normal memory, taking into consideration the amount and type of information.
- Moderate level of complexity for decision making.
- Normal time pressure of decision making.

ORGANIZATIONAL COMPETENCIES

To perform this job successfully, the employee will demonstrate the following competencies to perform the essential functions of the position.

All Legacy leadership staff are required to follow and uphold Legacy's Mission, Vision, and Values, Behavioral Standards, Legacy's Policies and Procedures, The Code of Conduct and The Code of Ethics and Compliance Plan. In addition, the following competencies are expectations for all employees:

Courteous – Employee is courteous in interactions with customers, which include patients/residents, physicians, fellow-employees and our community.

Respectful and Confidential – Employee respects the rights of privacy of our patients/residents and co-workers.

Ensures cultural differences are respected. Refrains from disruptive and disrespectful behavior which may include, but is not limited to:

- Obstruction of the operation of Legacy
- Interference with the ability of others to do their jobs
- Creation of a "disruptive work environment" for Legacy staff (including volunteers), or medical staff
- Conduct adversely affecting or impacting the community's confidence in the Legacy's ability to provide quality care
- Attacks (verbal or physical) leveled at any member of Legacy staff, medical staff, patients/residents or patients/residents' families that are personal or beyond the bounds of fair professional conduct
- Inappropriate comments or illustrations made in patient medical records or other official documents impugning the quality of care at Legacy, or attacking specific physicians, or Legacy staff
- Non-constructive criticism addressed to the recipient in such a way as to intimidate, undermine confidence, belittle or to suggest stupidity or incompetence.
- Disruptive and disrespectful behavior includes statements that are generated verbally, in writing or electronically in any form including e-mail, text messages, social network sites and blogs.

Responsive – Employee responds quickly, graciously and appropriately to customer needs.

Gratitude and Attitude: Employee's behavior shows that he/she believes that each of us controls our own attitude and that what is important is not so much as what happens to us, but how we choose to react to it.

Pride, Ownership and Image: Employee accepts all the rights and responsibilities of being a part of the Legacy family.

Communication- Employee is personally accountable for positive communication with the customer-patients/residents, family members and co-workers.

Teamwork- Employee contributes positively to the Legacy team and is committed to treating coworkers with courtesy, honesty and respect. Employee abides the Attendance Policy. Employee has team pride in the purpose of our work – our patients/residents.

Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to handle frequent change, delays, or unexpected events.

WORK ENVIRONMENT

- May be exposed to infectious waste, diseases, conditions, etc., including viruses.
- The noise level in the work environment is usually moderate

Legacy Community Health Services has reviewed this job description to ensure that essential functions and basic duties have been included. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills and abilities. Additional functions and requirements may be assigned by supervisors as deemed appropriate.

I have read and understand my responsibilities for this role at the Legacy Community Health Services as noted above.

x

Employee Signature

Date

9/11/14



Job Description

Job Title Health Promotions Coordinator
Supervisor Director of Health Promotion
FLSA Status Non-Exempt

Health Promotions Coordinator:

Responsibilities:

- Assist the director with desktop appointment management and charting for patient educators.
- Assist director with managing meeting notes for departmental meetings.
- Assist in preparation and implementation of events including baby showers, graduations, orientations, health and education fairs and others as needed.
- Assist patients with referrals to outside organizations when needed.
- Complete monthly and quarterly reports in collaboration with director.
- Contact "Becoming a Mom" patients for each location to conduct postcard/survey.
- Data entry and management of database (Excel and Access) for all departmental programs/services.
- Enroll patients/participants into various education classes in Centricity.
- Mange reminder calls to patients for upcoming classes
- Mange petty cash and deposits
- Mange patient incentives for program participation
- Provide information regarding education and adult literacy classes.
- Provide clerical and administrative support duties to Health promotions Department

- Schedule Patients for follow up classes as needed.
 - Schedule meetings and classroom usage.
 - Track inventory class materials, handouts, brochures, ROR/GED/ESL books, store items, office supplies, and departmental forms.
 - Other duties ass assigned.
-
- **Requirements:**
 - Must have a high school diploma or GED.
 - Ability to present to groups.
 - Prefer minimum of 1 year experience in a similar work environment, a plus if within a healthcare organization.
 - Bilingual Spanish and English
 - Knowledge and skilled in Microsoft programs: Word, Excel, Publisher, Power Point, and Access.

Physical/Sensory Requirements (with or without the aid of mechanical devices):

Medium Work – Ability to exert 20-50 pounds of force occasionally, and/or 10-25 pounds of force frequently, and/or greater than negligible up to 10 pounds of force constantly to lift, carry, push, pull, or otherwise move objects.

OSHA Category Classification:

II: Potential for exposure to blood borne pathogen

Note: *All duties and responsibilities listed are considered to be essential job functions and requirements, and are subject to possible modification to reasonably accommodate individuals with disabilities. Marginal functions of the position (those that are incidental to the performance of fundamental job duties) have not been included. However, the omission of specific statements of*

duties does not exclude them from the position if the work is similar, related or logical assignment to the position.

This job description does not constitute an employment agreement between the employer and the employee, and is subject to change by the employer as the needs of the business and requirement of the job change.

When formal job descriptions are created or revised for positions that mandate membership on the PI Committee, the Committee and its Human Resources Department representative will ensure that the duties and responsibilities delineated in the description include Committee membership and active participation in the PI Program.

Signature:

I have read and understand the above job description. By signing below I certify that I meet the minimum requirements and physical demands of the job.

Karen Palma
Name (please print)


Signature

9/10/13
Date



Job Description

Job Title Health Promotions Coordinator
Supervisor Director of Health Promotion
FLSA Status Non-Exempt

Health Promotions Coordinator:

Responsibilities:

- Assist the director with desktop appointment management and charting for patient educators.
- Assist director with managing meeting notes for departmental meetings.
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-
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Signature:

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Karen Palma
Name (please print)


Signature

9/10/13
Date

ATTACHMENT I



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From: Karen Palma
Sent: Wednesday, June 29, 2016 3:39 PM
To: Amy Leonard
Cc: Elizabeth Mondello; Diana Dean
Subject: Question

Hello Amy,

I just wanted to clarify the following with what was discussed in the meeting this afternoon regarding my teaching the Family Planning class:

- 1) "I have to put aside my religious beliefs," as you stated in the meeting, because I am a Catholic and do not believe in birth control.
- 2) I would have to verbally teach the class and answer questions instead of playing a Family Planning video

Karen Palma

Patient Educator
Legacy Community Health
Lyons Clinic
5602 Lyons Ave.
Houston, TX 77020



legacycommunityhealth.org



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Karen Palma

From: Amy Leonard
Sent: Wednesday, June 29, 2016 8:58 PM
To: Karen Palma
Cc: Elizabeth Mondello; Diana Dean
Subject: RE: Question

Hi Karen,

In our meeting today, we discussed how sometimes employees may need to put aside their own personal beliefs or views in order to meet the job requirements. Part of your job as a Patient Educator is to provide quality education to patients on a variety of topics including family planning. This includes not only playing a video on family planning and providing a brochure, but also being willing to lead a comprehensive discussion regarding the information provided and answer any questions participants may have about the video.

We also discussed doing verbal presentations in the future on any of the health education topics. We mentioned that the expectation was that anyone in the Patient Educator position would need to be willing to have a dialog about the topics they present.

You also mentioned last week that you were not comfortable going to a meeting about birth control at the Planned Parenthood location. We then were able to have the meeting at our Lyons location instead and you still said you were not comfortable attending the meeting. However, today you mentioned that after speaking to Arudis Guidry you would be okay with learning more information, but still did not want to lead a discussion or answer questions about birth control.

Please let me know if you need further clarification.

Kind regards,
Amy

 Amy Leonard, MPH

Vice President of Public Health Services
Legacy Community Health
Montrose Clinic
1415 California Street
Houston, TX 77006



legacycommunityhealth.org

Karen Palma

From: Diana Dean
Sent: Thursday, June 30, 2016 4:00 PM
To: Karen Palma
Cc: Elizabeth Mondello; Amy Leonard
Subject: PTO and confirmation of our conversation

Karen –

I've looked into your PTO balance, you have used 110.5 of your 168 hours for your PTO year (which goes from Sept. to Sept.). Therefore, you have 57.50 hours left. However, I see that you also have future PTO scheduled for July 1, 15, 18, 25 which is 32 hours.

We discussed this morning that since you are not comfortable meeting the position expectation of discussing family planning with patients that you cannot continue in the Patient Educator position. We respect your choices and as such we want to assist you in transitioning to another position in or outside of Legacy. We mentioned yesterday that we would allow you to work through the month of July and that Libby could teach the classes on family planning instead of you during July. This morning, I suggested that you work at Lyons through July 8th and then we would pay you the remaining 3 weeks of July so that you can focus your time on your job search. If we do this, then you would have PTO for tomorrow, July 1st, but then the 15th, 18th, and 25th would be regular pay and you would be paid out 49.5 unused hours of PTO and 3 weeks of regular pay (July 11th-29th). Your last day of employment would be July 8th and your medical benefits would go through July 31st and you would be eligible for COBRA thereafter.

We value the work that you have done teaching other health education topics and we hope that assisting you in this way will enable you to make a positive transition. If you find an internal position within Legacy before July 29th, we can talk about different transition dates if needed.

Please confirm if you have any questions -
Diana

[REDACTED]

ATTACHMENT J

Karen Palma

Patient Educator
Legacy Community Health
Lyons Clinic
5602 Lyons Ave.
Houston, TX 77020


legacycommunityhealth.org



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From: Karen Palma
Sent: Friday, July 08, 2016 3:38 PM
To: Diana Dean
Subject: RE: Meeting at the end of the day today

I have always been willing to do my job including the instructional part of my job. Last week when we discussed this matter I asked at that time to have my religious beliefs accommodated and you said that was not possible. I am willing to work with you to find a appropriate accommodation for my religious beliefs, is Legacy unwilling to provide any religious accommodation for me? Again, I want to stay here. If I am fired today, I want to be clear, this is not a mutual termination.

From: Diana Dean
Sent: Friday, July 08, 2016 3:11 PM
To: Karen Palma
Subject: RE: Meeting at the end of the day today

Karen

We acknowledge all the hard work you have done and the patients you have helped. It is not going unnoticed; it's unfortunate you feel otherwise. I saw this as mutual because you are not willing to do an instructional part of your job. We discussed that last week and gave you time to think about it. Have you changed your answer?

Whether you consider this mutual or not, this is a term due to your unwillingness to perform a portion of a major function of your position. The fact that other managers in the past may have arranged a way for you to avoid instruction on family planning does not mean that it was the correct way to handle your avoidance of the topic. We discussed last week that Lyons will be increasing the family planning classes and we do not have the staff to allow Patient Educators to teach only certain courses. If this changes, we will let you know. You are leaving as eligible for rehire and, as we discussed, I'll be happy to speak on your behalf if you see another position you would like to apply for.

The major function of your job is to develop, implement and/or educate patients about prenatal care, newborn care, breastfeeding, car seat safety, diabetes and high blood pressure management, **family planning**, and women's and men's health¹. You were aware of this upfront before accepting this position and again in early 2014 when you read your job description.

We can go over any other question or comments you have when I get to Lyons. See you shortly.

Diana

From: Karen Palma

Sent: Friday, July 08, 2016 11:06 AM

To: Diana Dean [REDACTED]

Subject: RE: Meeting at the end of the day today

This is not a mutual termination. I love what I do, I love my work, I worked hard, employees and patients at Legacy loved me, and the clinic staff and my previous director were willing to accommodate my religious beliefs. Other companies accommodate people for their religious beliefs. For a year and a half I showed a video and it didn't affect my patients from learning the material until Patient Educators were switched to new leadership.

And here I was a moderator to SMOVE where it talks about Legacy's values where they do not discriminate sexuality, gender, or religion. So as a result I am being discriminated because of my religious beliefs. I feel all the good that I have done with all the other classes I teach seem to go unnoticed and not taken into consideration. I'm in disbelief this one class where an educational video educates patients for the Family Planning class would result in termination.



Vice President of Human Resources
Legacy Community Health

Montrose Clinic
1415 California
Houston, TX 77006



legacycommunityhealth.org



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From: Diana Dean
Sent: Friday, July 08, 2016 10:44 AM
To: Karen Palma
Subject: RE: Meeting at the end of the day today

This is a mutual end of employment termination. After reviewing the job description expectations you said you were not comfortable with showing more than the video on birth control, you mentioned that you would not be able to answer questions or lead discussions on that topic. As a Patient Educator, you cannot fully do the job without being willing to cover all topics. Therefore, we agreed to allow you to work the rest of the month while you seek other positions. I later thought it would be easier for you to make your transition if you could focus on your job search rather than come in to work July 11-29. Your last day of employment will be today, July 8th, but you will be paid through July 29.

Diana

From: Karen Palma
Sent: Friday, July 08, 2016 9:48 AM
To: Diana Dean <[REDACTED]>
Subject: RE: Meeting at the end of the day today

Good morning Diana,
I just wanted to clarify that am I getting terminated as fired or laid off?

From: Diana Dean
Sent: Friday, July 08, 2016 9:47 AM
To: Karen Palma
Subject: Meeting at the end of the day today

Good Morning Karen,
Let's meet at 4pm today to go through the exit meeting. It should only take about 10 minutes. I will need your badge, computer, and any other company items. I'll have a print out of benefit contacts for your to take and we'll make a copy of the exit checklist once completed so you can take that too.

I'll see you later today,
Diana

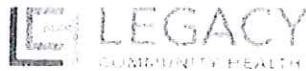
Diana Dean 
Vice President of Human Resources
Legacy Community Health
Montrose Clinic
1415 California
Houston, TX 77006

[REDACTED]
[REDACTED]
[REDACTED]
legacycommunityhealth.org



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ATTACHMENT K



EMPLOYEE TERMINATION/RESIGNATION

Diana [Redacted]
[Redacted]

Employee Name: Karen Palma
Address: [Redacted] Phone Number: [Redacted]
Social Security: xxx-xx-[Redacted] Grant Funded Position: ☒ Yes ☐ No
Title: Patient Educator Department: Public Health Services
Date of Hire: 09/09/2013 Date of Termination: 07/08/2016
☒ Involuntary ☐ Voluntary Benefits to be discontinued: 07/31/2016
Eligible for Rehire: ☒ Yes ☐ No Severance Pay: ☐ Yes ☒ No (If yes, list amount):

Reason for termination:

- | | |
|--|---|
| <input type="checkbox"/> Resigned with Notice | <input type="checkbox"/> Retirement |
| <input type="checkbox"/> Resigned without Notice | <input type="checkbox"/> Unsatisfactory Job Performance |
| <input type="checkbox"/> Misconduct | <input type="checkbox"/> End of Casual Employment |
| <input type="checkbox"/> Violation of Company Policies or Procedures | <input type="checkbox"/> Ineligible to Work in the U.S |
| <input type="checkbox"/> Failure to Return from LOA | <input type="checkbox"/> Employee Deceased |
| <input type="checkbox"/> Medical Reasons | <input type="checkbox"/> Reduction in Force (lay-off) |
| | <input checked="" type="checkbox"/> Other: See Envol |

IT (initials)

Payroll (initials)

Facilities (initials)

- | | | |
|--|--|---|
| <input checked="" type="checkbox"/> Laptop/Laptop Power Cord/Mouse | <input type="checkbox"/> Cell Phone Stipend Form | <input checked="" type="checkbox"/> Badge |
| <input checked="" type="checkbox"/> Cell Phone or Cell Phone Stipend (notify IT) | <input type="checkbox"/> Final check mailed | <input checked="" type="checkbox"/> Keys |
| <input type="checkbox"/> Ipad (Marketing CRM's - pull file for inventory) | <input type="checkbox"/> Credit Card | <input type="checkbox"/> Radiology Badge |
| <input type="checkbox"/> Wi-fi device | <input type="checkbox"/> | <input type="checkbox"/> |

Before employee's last day of employment:

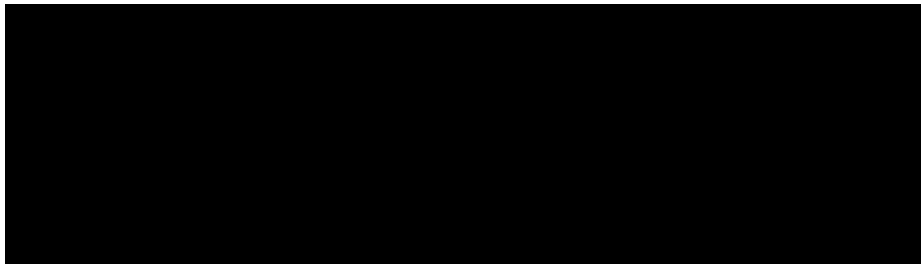
After employee's last day of employment

- | | |
|---|--|
| <input type="checkbox"/> Resignation letter from employee (if applicable) | <input type="checkbox"/> Give termination paperwork to Payroll |
| <input type="checkbox"/> Schedule an exit interview | <input type="checkbox"/> Term employee in HRO |
| <input type="checkbox"/> Exit questionnaire (if applicable) | <input type="checkbox"/> Remove Direct Deposit |
| <input type="checkbox"/> Add to EARS | <input type="checkbox"/> Blue/Yellow file in term cabinet |
| <input type="checkbox"/> Prepare termination paperwork/PTO payout | <input type="checkbox"/> |
| <input type="checkbox"/> All patient charts closed (Providers) | <input type="checkbox"/> |

Employee Signature: Refused to sign Date: 7/8/16

Human Resources: [Signature] Date: 7/8/16

New Address:





PTO Payout

Karen Palma DOH 09/09/2013

TERMINATION DATA:	Start	Termination
Dates	9/9/2013	7/8/2016
Bi-Weekly Salary	\$ 1,540.00	
Hourly Equivalent (Sal x 26 / 2080)	\$ 19.25	
Months Worked, Final Year	10	
Months Not Worked, Final Year	2	

PTO HOURS:	Award	Over usage from previous yr.	Rollover	Used	Balance
Current PTO Status	168.00			86.50	81.50
Award Adjustment for					
Months Not Worked (Award / 12 x Mo.s)	(28.00)			-	(28.00)
Adjusted Totals for Payment at Termination	140.00			86.50	53.50

PTO PAYOUT AT TERMINATION:	
PTO Balance (Maximum 80) x Hourly Equivalent	\$ 1,029.88
Hours Paid	53.5 Hours

*Signature required for negative PTO balance.

I, _____ authorize Legacy to deduct, from my final pay, the amount of
(Signature) any PTO that I have used but not accrued.

I also understand that if my final pay does not cover the full amount I owe, I will be required to make payment to Legacy for the balance.