



Blue Cross
of Florida



Blue Shield
of Florida

INTER OFFICE MEMO

TO: Distribution A-H

AT:

DATE 5/4/73

FROM: W. T. Gibson 

AT:

Personnel

SUBJECT: Personnel Requisition SOP

The attached Personnel Requisition SOP has been submitted to Senior Staff for approval.

Until we receive word to the contrary, we consider the SOP tentatively approved, and you should start using the procedure when submitting personnel requisitions on new form P-111 (3/73).

Should changes become necessary based on Senior Staff comment, the procedure will be updated and redistributed at that time.

WTG/dbg

Attachment

EFFECTIVE DATE 5/7/73	PROCEDURE TITLE PERSONNEL REQUISITIONS	PROCEDURE NO. IV K 6	PAGE NO. 1 of 4
MAJOR AREAS AFFECTED All Divisions	APPROVED BY W. T. GIBSON, B. N. BATIE	REVISES OR SUPERSEDES IV K 6	May 9, 1972
		PREPARED BY B. W. Nielsen	

I. GENERAL
A. Introduction

The increasing volume of claims and services which we as a Company must handle coupled with a highly mobile labor force and technological changes in our claims processing create a need for periodic adjustments in our personnel complement.

Wages and salaries comprise a major portion of our operational budget. Therefore, all personnel requisitions need to be correctly documented and thoroughly justified and reviewed prior to final approval and employment action.

With the expanded use of bulletin board posting of both exempt and non-exempt positions, the time cycle to fill a position has increased. Prompt departmental action is therefore needed in processing personnel requisitions especially when a delay in obtaining personnel could result in degradation of service to our subscribers.

B. Purpose

The purpose of this procedure is to outline the sequence of actions to be taken from preparation of the initial request through final approval of the personnel requisition and employment action.

C. Scope

This procedure applies to personnel requisitions for:

- New Personnel: where no authorized position currently exists.
- Additional Personnel: Where the position exists but additional manpower authorizations are requested.

Replacement Personnel: where a person in an authorized position is to be replaced.

II. SPECIFIC
A. Requestor

1. Determines the need to initiate a personnel requisition.
2. Prepares the personnel requisition (Form P-111 3/73, three-part form) using the Evaluation Report, Non-Exempt/Exempt Employees, (E.D.P. Job Number 2415) to supply correct position title, job number, and cost center and to check current manpower authorizations for existing positions.
3. Insures that a replacement requisition includes the transfer or termination action on the individual being replaced.
4. Writes a justification when submitting personnel requisitions that request manpower not currently authorized. (New and additional personnel).
5. Insures that all data required by the P-111 Instructions have been filled in, then forwards the requisition to the Department Manager.

B. Department Manager

6. Determines through analysis of departmental workload whether the requisition is justified.
7. Reviews current departmental and cost center budget reports to determine the current status of budgeted funds.
8. Reviews the position description for the job for which additional

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or replacement personnel is being requested. (Required only if review has not been done in the last six months). Approves as is (or update) and forwards with the personnel requisition.

9. Assigns a requisition number starting with the cost center code and places at the bottom (Section 8) of the P-111 for reference purposes. (Example 402-01).
10. Pulls the record copy and sends the completed replacement personnel requisition to the Divisional Vice President for approval. (See Part F, Divisional Vice President)
11. Insures that a position description is written for new positions for which personnel are requisitioned. (Refer to Hay System Manuals)
12. Pulls the record copy and forwards personnel requisitions for new and additional personnel (with attached justification and position descriptions) to the Administrative Review section of the Methods Department.

C. Assistant Manager, Methods Department - Administrative Review

13. Receives and logs requisition forwarded by the Departmental Manager.
14. Contacts Manager when necessary to assure timely response and clarification.
15. Assigns review to available Methods Department analyst.

D. Methods Department Analyst

16. Establishes a mutually acceptable anticipated completion date for the Methods Department review, taking into consideration the urgency of the need, the complexity of the review,

and manpower available for the review.

17. Conducts detailed analysis for requisition through utilization of the following data:
 - a. Work Measurement Study results, where applicable.
 - b. "Authorized" manning levels as approved in the Evaluation report, Non-Exempt Employees, E.D.P. Job Number 2415 and reflected in the latest organizational charts. Personnel; Wage and Salary is the contact on these documents.
 - c. Departmental overtime reports.
 - d. Current cost center budget reports.
 - e. Any other relevant information available.
 18. Prepares the recommendation on the requisition based on his analysis, additional information available within the Methods department, and consultation with his assistant manager.
 19. Discusses findings with the Departmental Manager in order to reach an agreement.
 20. Indicates recommendation for approval or non-approval by attachment of a memo containing data and reasons for indicated action.
 21. Returns all requisitions and attachments to the appropriate Department Manager.
- E. Requesting Department Manager
22. Receives requisitions forwarded by the Methods Department.
 23. Reviews analysis with attached recommendations and makes the following decision:
 - a. Withdraws requisition and notifies Methods Department of his action, or

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b. Forwards requisition with attachments to Division Vice President with request for approval.

F. Divisional Vice President

- 24. Reviews requisition and attached documentation received from the Departmental Manager.
- 25. Requests any additional information required from the Methods Department, the Departmental Manager, etc.
- 26. Forwards replacement requisitions approved to Personnel, Wage and Salary.
- 27. Forwards approved requisitions for new or additional personnel with attachments to the Senior Vice President.
- 28. Returns Personnel requisitions not approved to the Department Manager.

G. Senior Vice President

- 29. Reviews all requisitions and attached documentation received from the Division Vice Presidents.
- 30. Requests any additional information needed.
- 31. Returns requisition to the Division Vice President with approval or disapproval.

H. Division Vice President

- 32. Returns personnel requisitions not approved by the Senior Vice President to the Department Manager.
- 33. Forwards approved personnel requisitions with documentation to Personnel, Wage and Salary.

I. Personnel, Wage and Salary

- 34. Receives all approved Form P-111's and screens them for completeness, accuracy, and authorization.
- 35. Returns incomplete P-111's to the department manager at once, or telephones and invites him to discuss the problem.
- 36. Submits new approved positions to the Appropriate Hay Committee (Exempt or Non-Exempt) for evaluation.
- 37. Records new authorizations and positions and updates the "data base" for the Evaluation Report, Non-Exempt/Exempt Employees.
- 38. Pulls and files the Methods evaluation and position description.
- 39. Forwards one copy of personnel requisitions on which all actions have been completed to the Personnel Employment office for employment action. Forwards the other copy to Payroll for termination, transfer, or promotion action.

J. Personnel Employment Office

- 40. Receives approved requisitions from the Wage and Salary Office and initiates employment action.
- 41. Notifies the requesting department supervisor when the requisition has been filled and gives the anticipated starting date.
- 42. Forwards one copy of Personnel Data Sheet (P-96)-filled out in part from the P-111 - to Personnel Payroll for inclusion of this information in the computer personnel master file. Also sends a copy of the P-96 to the Cost Accounting and Budget Section for budget control purposes.

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43. Compiles a weekly summary of personnel employment transactions.

44. Files the personnel requisitions for reference for a period of one year, then destroys them.

K. Methods Department

45. Summarizes requisition log monthly Step #13, in memo form showing only approved budgeted contingency (new) positions by cost center.

46. Forwards a copy of the summary to the Cost Accounting and Budgeting Section and to Personnel Employment.