

TRAINING UPDATE

Lab Location: SGMC & WAH
Department: Field Ops

Date Distributed: 7/17/2017
Due Date: 8/17/2017
Implementation: 7/17/2017

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
Non-Technical Career Ladder SGAH.L882 v1 Note: this has been converted to a system SOP Request for Promotion via the Non-Technical Career Ladder AG.F383.0
Description of change(s):
<p>Section 5: Updated requirements of career ladder; added Field Ops Rep II trainer to career ladder; added demotion section.</p> <p>Section 6: Added new request for promotion form</p> <p>Form AG.F383 is a new request for promotion form (old forms have been retired)</p> <p><i>Note: all Field Ops job descriptions have been revised into the new Quest format and a new one written for Rep II Trainer</i></p> <p>This revised SOP and form were implemented on July 17, 2017</p>

Document your compliance with this training update by taking the quiz in the MTS system.

Non-Technical SOP

Title	Non-Technical Career Ladder	
Prepared by	Leslie Barrett	Date: 7/10/2014
Owner	Robert SanLuis, Stephanie Codina	Date: 7/3/2017

Laboratory Approval		
Print Name and Title	Signature	Date
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

Review:		
Print Name	Signature	Date

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1. PURPOSE

To define a structured job classification process for Field Operations employees that will:

- Outline accountabilities and role expectations associated with jobs at different organizational levels within the non-technical laboratory.
- Provide career paths for individuals to advance.

2. SCOPE

This procedure applies to Field Operations staff members wishing to progress their careers in the non-technical areas of the laboratory.

3. RESPONSIBILITY

All Field Operations staff members should understand the steps required for career progression.

4. DEFINITIONS

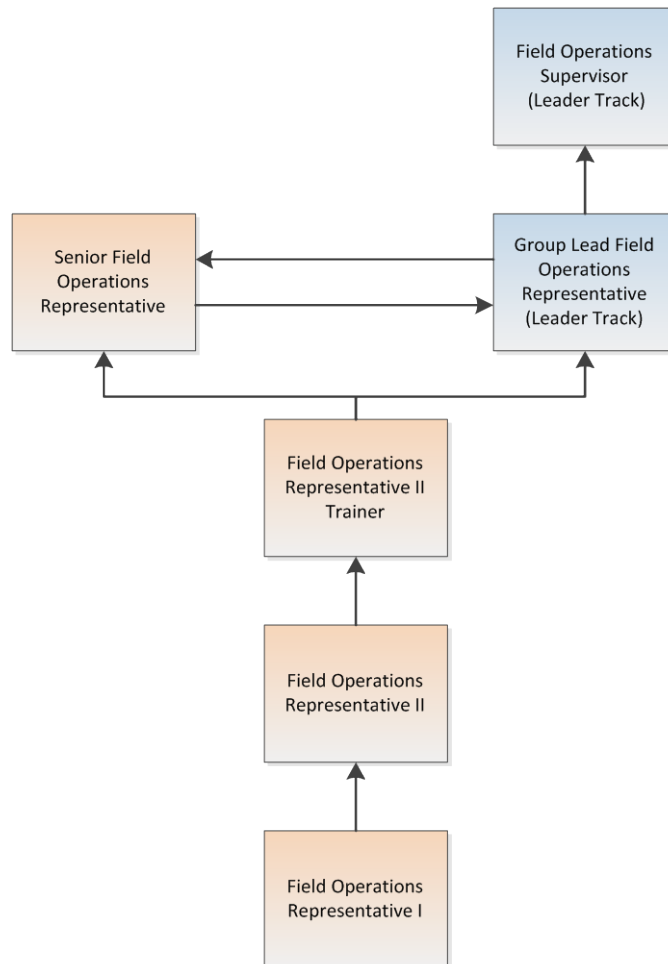
Career Ladder: A process designed to formally progress an employee to a higher level of job responsibility within his/her current position. The employee and supervisor / manager work together to progressively advance the employee to the higher level of responsibility.

Benefits of a career ladder:

- Employees can develop new skills and competencies in their current jobs.
- Employees can advance to a higher level of responsibility
- Employees can demonstrate initiative and willingness to work to further departmental and corporate goals.
- The employer can retain valued employees who are motivated to advance their careers.
- The employer can attract high quality employees and provide the employees an opportunity to advance within their positions.
- The employer can develop well-trained employees who have high morale.
- The employer can provide a higher level of quality and service to clients.

Non-Technical Career Path: The normal growth of an employee within the organization.

Non-Technical Career Path



5. PROCEDURE

A. Position Titles, Requirements and Grade

Position	Requirements
Field Operations Representative I Grade: 27 Job Code: 100184	<ul style="list-style-type: none"> Staff members beginning employment in the field operations department. Minimum qualifications apply.
Field Operations Representative II Grade: 28 Job Code: 100192	<ul style="list-style-type: none"> Staff members who have completed training and demonstrate competency in at least two field operations departments (phlebotomy, client services, or specimen processing).

Form revised 3/31/00

Position	Requirements
<p>Field Operations Representative II Trainer</p> <p>Grade: 28 Job Code: 100192 (b)</p>	<ul style="list-style-type: none"> • Staff members who are trained in at least two field operations departments and demonstrate the following characteristics. <ul style="list-style-type: none"> ○ Knowledgeable of departmental policies and procedures ○ Follows policies and procedures as written ○ Clearly explains tasks and procedures ○ Breaks down complex ideas to explain them thoroughly ○ Coaches, critiques, and mentors staff members ○ Listens attentively and actively ○ Sensitive to non-verbal cues ○ Maintains open lines of communication upward and downward ○ Organized ○ Creates a supportive environment ○ Manages time effectively ○ Balances multiple responsibilities ○ Patient, flexible, empathetic, nurturing
<p>Senior Field Operations Representative</p> <p>Grade: 29 Job Code: 101635</p>	<ul style="list-style-type: none"> • Staff members who serve as a subject matter expert in at least two field operations departments. • Staff members must assume responsibility for at least one recurring project within the department as assigned by the supervisor/manager. • Must demonstrate the following characteristics. <ul style="list-style-type: none"> ○ Leadership skills in problem solving. ○ Ability to develop and implement a quality management system. ○ Mentor for other staff members ○ Participant in organization-wide activities, committees, and process improvement projects ○ Involved in the development of new techniques/procedures ○ Develops, reviews, and validates departmental procedures • Must be recommended for this position by the Field Operations Supervisor/Manager and approved by the Laboratory Manager or Director.

Position	Requirements
<p>Group Lead Field Operations Representative</p> <p>Grade: 29 Job Code: 100917</p>	<ul style="list-style-type: none"> • Staff members who serve as people leaders in the department. • Demonstrate proficiency in all three field operations departments. • Must demonstrate the following characteristics: <ul style="list-style-type: none"> ○ Provides work direction on a daily basis ○ Leadership skills in problem solving and conflict resolution ○ Provides feedback to the supervisor regarding performance management and staff performance reviews ○ Provides input in the hiring process ○ Performs supervisory functions in the absence of a supervisor ○ Mentors other staff members ○ Trains and assesses competency for other staff members • Must be recommended for this position by the Field Operations Supervisor/Manager and approved by the Laboratory Manager or Director.

B. Requirements for Reclassification

Step	Action
1	<p>Any employee wishing to advance via the career ladder, must meet the following conditions:</p> <ul style="list-style-type: none"> A. No disciplinary action for the 12 months preceding promotion B. A score of “meets expectations” or better on the previous evaluation (if evaluation exists) C. Confirmation of training and competency D. Recommendation or approval from supervisor (Senior/Group Lead Field Operations Representative) E. Demonstrates requirements of position as listed above
2	<p>The employee must complete part I of the request for promotion form and submit the form to the supervisor to be considered for promotion.</p> <p>Note: Supervisor recommendation is required for promotion to positions of Senior or Group Lead Field Operations Representative. An employee cannot request promotion to these positions prior to obtaining recommendation from the supervisor.</p>

Form revised 3/31/00

Step	Action
3	<p>The supervisor will verify whether the employee meets requirements of the new position by completing part II of the request for promotion form within 30 days.</p> <p>A. If the promotion request is denied, the supervisor will notify the employee. The supervisor will document the reason for denial on the form. The supervisor will identify actions the employee needs to take to meet the requirement of promotion in the future.</p> <p>B. If the promotion request is approved, the supervisor will generate a status change form to promote the employee and generate a pay raise. Lab manager/director approval is required.</p> <p>a. If the employee's current rate of pay is below midpoint, he/she will receive a 10% increase.</p> <p>b. If the employee's current rate of pay is at or above midpoint, he/she will receive a 5% increase.</p> <p>c. Retroactive pay increases will not be given.</p> <p>The supervisor will notify the employee that the request was approved and the effective date of the pay increase.</p>
4	<p>The completed promotion request form will be placed in the employee's personnel file.</p>
5	<p>The supervisor will ensure a promoted employee signs his/her new job description. A copy of the signed job description will be forwarded to the HRSC. The original signed copy of the job description will be maintained in the employee's personnel file.</p>

C. Demotion Via the Career Ladder

Step	Action
1	<p>An employee may be demoted via the career ladder at any point where he/she no longer meets the requirements of the job. This may be done at the request of the employee, due to a change of status (decrease of hours from fulltime to part-time), or at the request of a supervisor based on performance.</p>
2	<p>Demotion will include a pay decrease of 5% for EACH step of the career ladder the employee regresses. For example, if an employee goes from Senior Field Operations representative to Field Operations Representative II, that employee will receive a 5% decrease for the first step and a 5% decrease for the second step. If an employee is demoted within 6 months of promotion, he/she will return to the pre-promotion pay rate.</p>

6. RELATED DOCUMENTS

Form: Request for Promotion via the Non-Technical Career Ladder (AG.F383)

Form revised 3/31/00

7. REFERENCES

N/A

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
0	7.3.17	Updated owner Header: Added WAH Section 5: Updated requirements of career ladder; added Field Ops Rep II trainer to career ladder; added demotion section. Section 6: Added new request for promotion form	SCodina	NCacciabeve

9. ADDENDA AND APPENDICES

None

Request for Promotion via the Non-Technical Career Ladder

Part I: To be completed by the employee	
Employee Name:	Employee ID:
Promotion (check one): <input type="radio"/> Field Operations Representative I (27) to Field Operations Representative II (28) <input type="radio"/> Field Operations Representative II (28) to Field Operations Representative II Trainer (28)	
Supervisor Recommendation for Promotion (check one): <input type="radio"/> Field Operations Representative II Trainer (28) to Senior Field Operations Representative (29) <input type="radio"/> Senior Field Operations Representative (29) to Group Lead Field Operations Representative (29) <input type="radio"/> List:	
Signature:	Date:
Part II: To be completed by the supervisor	
1. Disciplinary action for preceding 12 months <input type="radio"/> None <input type="radio"/> List:	
2. Last performance evaluation score: _____	
3. Training and competency documents on file for the following departments: <input type="radio"/> Phlebotomy <input type="radio"/> Client Services <input type="radio"/> Specimen Processing	
4. Demonstrates requirements of new position. <input type="radio"/> Currently demonstrates <input type="radio"/> Will demonstrate in the future <input type="radio"/> Does not demonstrate	
Supervisor Signature: <input type="radio"/> Approved <input type="radio"/> Denied	
Pay Raise Evaluation: Current pay rate:	Pay range for current position:
New pay rate:	Recommended pay raise: <input type="radio"/> 5% or <input type="radio"/> 10%
Supervisor Signature:	Date:
Lab Manager/Director Signature:	Date: