

## Management OHgrievance Quick Tips

### Web address: <https://login.salesforce.com/>

- Please note that the union files at: <http://oh-grievance.force.com/AppLogin>. Union users also use their user ID's to login, whereas management users use their state email addresses.

### Log In:

- Log in: State email address, password
  - Forgot Password option (will send user a link to reset password)
  - User will be logged out if inactive for 2 hours
  - User MUST save any work prior to logging off or navigating off page

### Home Screen:

- **Search** (now in top portion of screen next to DAS logo) - User should leave "Search All" as the default and enter text in following field. \* is a wildcard search capability.
- **Messages and alerts** - any new updates from the Office of Collective Bargaining (OCB). This area will overwrite old messages unless OCB chooses to add to the previous messages.
- **Custom Links** – Provide job aids and quick tips on how to complete certain actions.
  - To search for a discipline/investigation, click the "Discipline/Investigation Search" custom link. For more information, see the "Discipline/Investigation Search" section on page 12.
- **Recent Items** – List areas visited recently, with the most recent sites on top. Where the listing includes grievances, the link will display key information including grievant name, status (open, close, draft), step, grievance type and sub-type, tag.
- **Tasks** – Each user can create a "to do" list and/or OCB could assign tasks where needed. Will be used as part of scheduling process to obtain date(s), arbitrator(s) and other agency feedback.

### Issues/Questions and New User Set Up:

**It is essential that users submit questions and concerns regarding system functionality as well as request for new user accounts in the "Issues/Questions" tab. This will ensure all system administrators receive a message and the issue remains open until addressed.**

- Select “Issues/Questions” from navigation bar
- Select “New”
- Select “New User Setup” or “Issue/Question”
- Provide required fields
- Save
- System Administrator will be notified by email
- Updates will be sent to requestor by email
- **User may receive an email requesting “additional information required” and will need to click on the link, edit the issue, add the requested information in the “Additional Information Provided” box and change the status to “Add’l Info Added.”**

#### Grievance:

- **Must refresh screen by clicking on “Go” next to “View” box to ensure all information is visible**
- Lists all grievances received for the work area or agency, depending on the user’s authorization
  - General information on each grievance to include grievance number, grievant name, current step, management response (if any) and union reaction (if any) to that step.
- The right hand column allows short cuts to view:
  - Recently created, modified or viewed grievances
- List of existing list views (filters)
  - May create additional list views (job aid found under “Custom Links” and in the “Instructions” folder on the “Reports” tab
- **Note: Notice of “Cross-Agency” Grievances will go directly to OCB to determine which agency may best address the issue. Once assigned to a specific user, OCB will follow up with an email or call and the grievance will appear in the open grievances for that agency**

#### Opening Grievance:

- Click on the grievance number to navigate to the grievance page
  - Grievance Detail (Read Only):
    - Grievance Number – automatically assigned (e.g., BWC-2014-04347-14); Case numbers are assigned upon **submission and the five digit number** resets beginning of each calendar year
    - Grievant’s Agency (Read Only)

- Grievance Information – (Read Only):
  - Grievant's name and State of Ohio User ID, union, worksite, classification and bargaining unit. May also provide work phone, home phone and personal email of grievant if completed
- Grievant's Supervisor/Union Rep – (Read Only):
  - Grievant's and Union representative's name, work phone, home phone and personal email of if completed
  - Supervisor's name and work phone
- Specifics submitted by Grievant – (Read Only):
  - Date grievance arose
  - Grievance type and sub-type
    - Type = Discipline, must select sub-type (suspension, working suspension, fine, leave reduction & number of days or termination date)
    - Type = Issue, must select sub-type (layoff, non-selection, union leave, other)
      - Indicate if Class Action (list impacted personnel)
      - Indicate if Cross Agency (indicate agency)
    - Type = WOC, must enter grieved classification title and number
- Statement of Grievance – (Read Only):
  - Outlines grievance details and resolution requested
- Submission Verification – (Read Only):
  - Indicates date grievance was submitted, signature and affirmation
- Contract Articles Links (Read Only):
  - Must scroll to bottom of page
  - Lists all grievances allegedly violated
- Attachments

- Must scroll to bottom of page
- Grievance History
  - Will reflect all actions that occurred in the system, by date and user. This is helpful in determining owner of the grievance (who receives notifications), the step the grievance is at, when the grievance was submitted, a response was issued, when appeal options activated or deactivated and how a grievance closed.
- Please note that usually union representatives may only see the grievances filed within their chapter or agency. The grievant does have the ability to open up viewing to up to two additional representatives outside this structure. This is primarily to accommodate representatives who must file, appeal or withdraw on the behalf of a member outside their chapter/agency and/or OCSEA district representatives who must see multiple chapters.

#### Grievance Ownership and Viewing Rights:

- Note that only **one** person per agency may be the owner of a grievance and receive notifications.
- Owner DOES NOT set viewing rights, it is only for purposes of email notifications
- Please forward the notification email to other agency designees (e.g., your central office LRO if they handle step 2 grievances).
- Each agency must internally determine who is responsible for updating the grievance at step 1 vs. step 2, regardless of who receives notification (owner).
- Agency owner may now add a secondary notification on the main grievance screen. You may assign any person with the same or higher role to receive notifications. This will not remove the original owner from the notifications, but will send the newly assigned individual notifications also.
  - Once the secondary person is added, he/she will receive updates on the grievance when meeting dates are set, extension meeting dates are set, when a management response is issued, and when the grievance closes.

#### Locating/Opening a Grievance:

- Select **Grievance** tab
- Hit **“Go”** next to “View”
- Find Grievance by visually searching for grievance number or searching for part or all of the grievance number in the **“Search” box in the upper section of the screen next to the DAS logo.**

- Click on **link under Grievance number** to open Grievance

**Management Only Section of a Grievance (must be completed prior to setting meeting, response or settlement offer):**

- Open **Grievance** (see Locating/Opening a Grievance)
- **Edit**
- Scroll to **“Management Only Section”**
- Indicate a **tag** (short description of grievance used for searching similar grievances). **This field is mandatory.**
- Indicate **research class and code** (drop down menu, short description of grievance used for searching similar grievances). **These fields are mandatory.**
- User may indicate related grievances, potential or real liability if user chooses to provide. **These fields are not mandatory.**
- **User may indicate there are several related grievances, but designating one and marking the “This is a Master Record” or by going to the other grievances and indicating the specific original grievance number in the “Master Grievance” field. This will allow management to see all related grievances in the “Sub-Grievances” section of the grievance (found toward the bottom of the page near the “Notes & Attachments” section. This will allow for better reporting and to carry over applicable responses to other grievances (this is currently still a manual process) as well as allow for quicker identification of like issues at mediation. These fields are not mandatory.**
- **SAVE**

**Withdrawal of a Grievance**

Please note that the withdrawal of a grievance is considered to be the union’s primary responsibility. However, if you receive a signed withdrawal, management may enter it into the system.

- Click “Grievances” along the toolbar at the top of your page and locate the grievance. Click **Edit** at the top of the page. **If not already completed,** please update the “Management Only Section” with the appropriate tag, research class, and research code. Click **Save** when you are finished.

- Scroll down to “Resolution steps”, Click **Withdrawal** button, name it and click **Save**. This will take you to the next screen to attach appropriate documentation. Click **Done** after you attach documentation and it will take you to the final screen to click **Submit**.

#### Setting a Meeting Date (after completing “Management Only” section of grievance):

- Open Grievance (see Locating/Opening a Grievance)
- Scroll to **Resolution Steps**
- Select applicable step (e.g., “**Step 1**”)
- Enter **meeting date**
- **SAVE**
- **Email notification** will be sent to the grievance creator, owner, and, if listed, the union rep. The owner may also forward the notification to add parties to the email.
- If the meeting must be rescheduled, or the parties cannot meet and issue a response within 15 days of receipt at step 1 or 50 days at step 2, the management user should indicate the extension/rotation date in the “Meeting Extension” field. **Email notification** will be sent as listed above.
- Failure to set a meeting date and issue a response within 15 days of receipt at step 1 or 50 days at step 2 will result in the system activating an Appeal option. Should the union appeal, management will no longer have an option to respond.
- When the parties know they will need additional time to meet and issue a response, the meeting date should be entered in the “Meeting Extension” field to prevent the Appeal function from activating.
- Management users may now select “Advance Step” when there is either a standing or specific agreement to move a grievance that would normally go to step 1 to step 2. When selected, the user will indicate the step 2 meeting date, time and location and may add an individual to receive notification.

#### Denying a Grievance:

- Open Grievance (see Locating/Opening a Grievance)
- Scroll to **Resolution Steps**
- Select link to applicable step (e.g., “**Step 1**”)

- Indicate **Step Name** – can indicate “step 1” or “step 2” as it will be overwritten with auto-populated text, but will not allow you to move forward if not completed
- Draft Response in “**Agency Notes**” under the “**Internal Notes**” section
- Once the response is ready to be shared with the union, update with **Public Response Detail** with your Agency Notes (copy and paste)
- Indicate name in **Management Respondent** (lookup)
- Indicate **Result** (Denied)
- **SAVE**
  - The system will NOT send an email notification, nor consider the response formally submitted until you “Submit” (i.e., the union will not be able to appeal until time limits exhausted). The user must also “submit” for the answer to be formally submitted. This is the most common oversight in management responses. Please ensure that you submit your response once it is complete.
  - Please note: The management response, if it has only been saved, can be reopened for later submission by scrolling down to the resolution step, clicking on the resolution step name, and clicking submit. However, regardless of submission, if you have a draft response in the public response detail section, it can be viewed by the union.
- **SUBMIT**
  - Email notification will go to relevant parties, union may appeal if denied.

#### **Settling a Grievance (Signed Hard Copy):**

- Open Grievance (see Locating/Opening a Grievance)
- Scroll to **Resolution Steps**
- Select link to “**Manual Settlement**”
- User will receive a prompt to attach signed settlement before submitting
- User will be taken to **Resolution Step Edit** screen
- Indicate “**Settlement**” in the “**Resolution Step Name**”
- Write any comments in “**Settlement Offer**” field

- Write any comments in “**Settlement Offer**” field. Include any additional information in the “**Notes**” section
- Click **Save**
- Go to “**Notes and Attachments**” and click “**Add Attachment**” to add the signed settlement
- **SUBMIT**
  - You will not be able to submit if the settlement has not been attached
  - Email notification will go out and case will close

**Electronic Settlement: (THIS IS STILL BEING TESTED AND IS NOT READY FOR USE)**

- Open Grievance (see Locating/Opening a Grievance)
- Scroll to **Resolution Steps**
- Select link to “**Electronic Settlement**”
- Type in specifics of settlement offer in the open text field
- **SUBMIT**
- **EDIT**
  - Indicate “**Settlement**” in “**Resolution Step Name**”
  - Add any notes in the “**Settlement Offer**” field
  - Check Approver 1 – 4 box
  - Indicate the persons who must receive and sign the settlement in the order required by applicable union by clicking on the magnifying glass and using the look up capability
  - Ensure all union members and representatives are listed as “**Customer Portal Users**” (choose from dropdown menu)
  - **SAVE**
  - **SUBMIT FOR APPROVAL**
  - Each indicated approver will receive an email when it is their turn to “agree” or “disagree.” This response must be completed in the email for portal users. Management users may also respond from email, or log in the system, open the settlement offer and approve from that location.

- Once this process is approved for use with each union, it will be essential that the LRO understands that offering a settlement in the method presumes he/she has the authority to offer and their signature is complete upon sending the offer.
  - Settlement offerer must make sure offer is sent to known representatives prior to grievant;
  - Settlement offerer must include OCB as last approver for all grievances that have been appealed to ADR or involved layoff or reclassification or termination.

**Disciplines: The section is not visible to the union**

Select “Discipline/Investigations” in the navigation bar

- Select “**New Discipline/Investigations**”
- Indicate “Discipline” in the “Discipline or “Investigations” drop down then “Continue”
- Employee: Look up of all employees in system, type up part or all of name and select appropriate employee
  - Look up and add link to a related discipline or grievance in “Discipline or Investigation” look up field.
  - Look up and add link to a related discipline or grievance in “Related Grievance” look up field.
- Status: Either “Active” or “Inactive” based upon effective date, any extended absences and/or subsequent discipline.
- Was Action Grieved? Allows the user to run reports on discipline issued vs. grieved.
- Initiation Date: Date Investigation or Discipline began. Cannot be a future date.
- Pre-Disciplinary Date: Date pre-disciplinary meeting date with the employee. Due date is set from this date. Must be a date after initiation date, before Effective and Served dates.
- Effective Date: Identifies date discipline is effective. Cannot be earlier than initiation date.

- Due Date: Identifies when a discipline must be issued to be in compliance with OCSEA 60 day deadline to issue discipline from the pre-disciplinary meeting date. Field is only visible on the “Discipline/Investigation Detail” screen (not when editing discipline fields).
- Served Date: Identifies date employee received the discipline. Cannot be a future date.
- Discipline Inactivation Date: 24 months from effective date of reprimand for OCSEA and 1199 employees (may be extended to OEA, FOP and OSTA. Otherwise, it is 12 months for these unions.), 36 months from effective date of suspension for OCSEA and 1199 employees (may be extended to OEA, FOP and OSTA. May be extended for all non-vacation absences longer than 14 days. This date will generate a report when discipline becomes inactive. The reviewing party must determine at that time if the discipline inactive date must be extended due to an absence or subsequent discipline. Otherwise, the status should change to “Inactive.”
- Approved Discipline: Select the discipline type from the “Available” field, and then select the right arrow to move to the “Chosen” field. Can be a combination of discipline types.
- If the wrong discipline is selected, move back to the “Available” field with the left arrow.
- If “Other” is indicated in the “Available” field, type in the actual discipline in the “Other Approved Discipline” field.
- Work Rules: Select the “Work Rules” violated from the “Available” field of research codes associated with discharge and discipline. Once you select a work rule, select the right arrow to move to the “Chosen” field.
- Additional Agency Work Rules: Indicate specific agency work rules that were cited and must be listed by numbers in the available fields.
- Approved Days Suspended/Fined: Indicate the total number of days the employee was issued if given a suspension, working suspension, fine or leave reduction.
- Final Discipline section: allows management user to note any updates to the discipline if challenged and modified (i.e., settled or grievance granted). Same fields as above with two only two additional fields:
  - Discipline Modified: please select if discipline is subsequently modified from original

- Reason Modified: allows management to indicate why discipline was modified (e.g., settlement, arbitration, EAP completion)
- Additional Detail
- Discipline Reason: Field to summarize conduct that led to issuance of discipline. May reference investigation packet attached.
- SAVE
- Should attach discipline letter and link the related investigation

### **Investigation:**

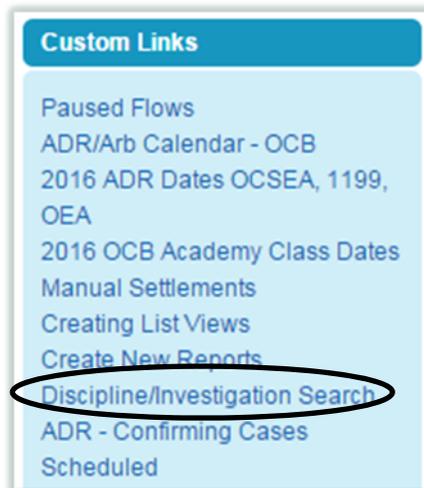
Select “Discipline/Investigations” in the navigation bar

- Select New
- Indicate “Investigation” in the “Discipline or “Investigations” drop down
- Look up “Employee” by typing all or part of name and selecting from list
  - Select “Unknown” if no specific employee is known, please deselect once name of an employee is known
- Look up “Investigator” by typing all or part of name and selecting from list
- Site: Indicate location where alleged incident took place if other than the employee’s work location
- Investigation Status: “Open” or “Closed”
- Look up and add link to a related investigation or grievance in “Discipline or Investigation” look up field
- Initiation Date: Date investigation began
- Completed Date: Date investigation concluded
- Look up and add link to a related discipline or grievance in “Add link to related investigation or grievance” field
- Allegation: Summary of the allegation, nature of the incident, circumstances that brought it about.

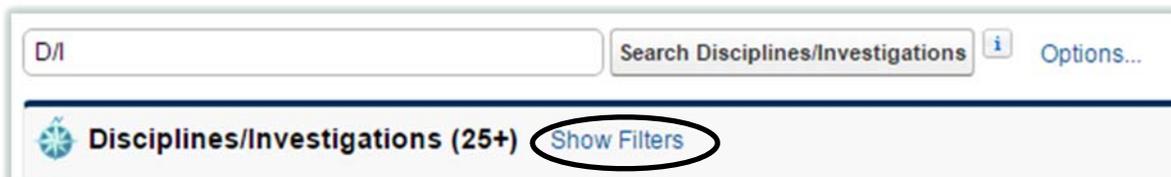
- Investigation Result: Summary of investigator’s findings.
- Person creating Investigation may assign the investigation to a specific person. If the person is a non-licensed user, he/she will receive all basic information entered into the investigation screen in an email, reducing the need to enter the system:
  - Complete all fields known, including “Investigator”
  - Scroll to “Activity History”
  - Select “Send an Email”
  - When email window appears, select “Select Template”
  - Select “Unfiled Public Template”
  - Select “Investigation Template – New”
  - Advise completion within 30 days and identify the receiver of the electronic copy of investigation. The e-mail investigation template will auto-populate the investigation number, employee under investigation (if known), location of alleged misconduct, and date investigation opened.

### Discipline/Investigation Search

- Go to the Discipline/Investigation Search page, which is a Custom Link Area on the left side of the page in the system



- Click on “show filters”



- This will allow you to search by Record Number, Case Name, or Employee

### **Viewing a Resolution Event (Mediation, Arbitration, Training, Union Leave)**

Please note that we have set mediation and NTA rotation dates for OCSEA, 1199 and OEA. We forward these dates at the beginning of each year and expect that agencies will put placeholders on these dates. Should any grievances from an agency be appealed and proposed for ADR, it will go on the next rotation and the agency will be expected to designate at least one designee to attend and/or advocate. An email will go to at least agency designee if case(s) are scheduled, and agency personnel should forward to any other needed management parties who must attend. Users can monitor their agency assigned dates for cases by:

- Go to “ADR/Arb Calendar – OCB” in left column of page under “Custom Links”
- Review calendar entries and click on link of relevant event to review general information about the event and attendees
- Click on the “Related To” link to see details about the specific event and cases scheduled for that day
- Users can also access all Resolution Events by clicking on the “Resolution Events” tab in the blue navigation bar and can select which type of events they wish to see by modifying the “View” (e.g., Arb events, ADR events, proposed (but not final) events, etc.)

**Union Leave:** Both union representatives and management users can see all union leave events that have been proposed by going to “Resolution Events” and selecting the “Union Leave Events” from the “View” drop down. Events should start with date name to hopefully assist with finding the event. When union representatives from your agency request leave to attend an union event outside your agency, OCB will forward the event information to the known contact for that member. That contact should forward the release to the supervisor.

## Other helpful tips

### Creating a Report

- Select the Reports tab. Click *New Report*
- Click plus sign *Other Reports*
- Click *Grievances*
- Click *Create (bottom right-hand corner)*
- Double Click on all fields you want on report (*left-hand of screen*)
- Show Field, select from drop down menu (*ex. My Grievances*)
- Date Field, select from drop down menu (*ex. Submission Date*)
- Range Field, select from drop down menu (*ex. All time*)
- Click *Save*

### Saving Commonly Used Reports

- Click on Reports in the Navigation Bar
- Review list of existing reports in left hand column
- Hover over folder named "Agency Reports"
- Click on the thumbtack
- Select "Pin to top"
- Hover over folder named "Union Reports"
- Click on the thumbtack
- Select "Pin to top"
- Hover over folder named "Grievance Dashboard Reports"
- Click on the thumbtack
- Select "Pin to top"
- Once you have pinned the folders to the top, please open each pinned folder and skim the available reports
- After reviewing existing reports, please come back to "Home" page, click on "X" next to this task, then hit "Save" so that the task will be removed and logged as complete
- Save Commonly Used Reports
- Click on Reports in the Navigation Bar
- Review list of existing reports in left hand column
- Hover over folder named "Agency Reports"
- Click on the thumbtack

- Select “Pin to top”
- Hover over folder named “Union Reports”
- Click on the thumbtack
- Select “Pin to top”
- Hover over folder named “Grievance Dashboard Reports”
- Click on the thumbtack
- Select “Pin to top”

Once you have pinned the folders to the top, open each pinned folder and skim the available reports

### **Creating a Template:**

- Locate your name in the upper right hand corner of your salesforce homepage and click the dropdown menu
- Select “setup”
- Select "Email" in the left hand column
- Select "My Templates"
- Select "My Personal Email Templates" from the drop down next to "Folder" then "New Template

You can also review existing templates in the “Unfiled Public Email Templates” folder and “Clone” then modify to preferred wording

### **Union Headquarter Filing:**

- If Union HQ filing for another employee must indicate State of Ohio ID and grievance should follow normal grievance path in the agency of the employee.
- If Union HQ is filing a state-wide grievance, they must select “Union HQ” as sub-type. Grievance will go directly to OCB and grievance number will have "00" as last two digits of if HQ files.

### **Adding Non-Licensed Personnel to a Grievance, Discipline/Investigation etc.**

In some instances, a grievance, issue/question, or discipline/investigation may involve other parties who are not licensed users in the OHgrievance system. However, non-licensed personnel can be added to a discipline or investigation, allowing them to receive relevant information via email.

- Log into the system and locate the desired grievance, issue/question, or discipline/investigation
- Scroll to the bottom of the page, and select “ Send an Email” under the “Activity History” section

- Enter the recipient's email address then scroll to the bottom of the page and click "Select Template"
- Use the dropdown menu at the top of the new window to select the desired folder, and select the desired template
- If needed, click "Attach File" at the bottom of the page to attach any additional documentation or information
- Click Send

### **Notifications:**

Programmed notifications with every new grievance and updates (scheduling an agency meeting, agency responses, appeals, closure):

- Creator's Email Address (person who logged into the system to file)
- Union's Universal Email Address
- Owner's Email Address (Agency Labor Relations Administrator or local level institutional/district Labor Relations Officer if designated by agency)
- OCSEA Chapter's Email Address

Additional notifications may go out if email address(es) are added at the time of filing the grievance:

- Grievant's Email Address
- Union Rep Email Address

Once a grievance is appealed to ADR and/or arbitration, creator and agency owner as well as all others designated on the portal and path will receive notification when 1) the case is scheduled, there is a change in status and/or a change in result.

Union and Management 1<sup>st</sup> and 2<sup>nd</sup> chairs and arbitrators will receive notifications as the ADR and Arbitration events are agreed upon.

If email notifications are sent to your spam folder, use the following steps to prevent future blocks:

- On your Outlook homepage, click the "Junk" dropdown folder from the "delete" section of the toolbar. Select "Junk E-Mail Options" from the dropdown list.
- In the Junk E-Mail Options window, select "High" as the level of junk e-mail protection.
- Go back to the main toolbar, and select the "Rules" dropdown menu in the "Move" section. Select "Manage Rules & Alerts" from the dropdown list.
- Click "New Rule" under the "Email Rules" section when the window opens up.
- Select "Start from a blank rule" and select "Check messages when they arrive" under Step 1. Click next.
- Under "Step 1: Select Conditions" click the box next to "with specific words in the message header." Click the "specific words" link under step 2.
- When the new window opens up, type "X-Spam-Flag: YES" into the search bar. Click add, then click okay.

- Under “Step 1: Select Actions” check the box next to “move it to the specified folder.” Click “specified” in the step 2 box.
- Select the Junk folder. Click okay.
- Click Finish

### **Attachments:**

- Both union and management may add notes or attachments to a new or existing grievance. The time the notes or attachment was added is logged.
- Attachments cannot be added to a grievance, investigation, or discipline in edit mode. You must save it first before you can add any attachments.
- Any document attached or note added under “Notes and Attachments” can be seen by all parties. The only exception is when you mark a note as “private” but then the note can only be seen by the user who added it.
- The same is true for the “public response detail” under the management response section.
- You can put notes in the “Additional Notes” under the management response and this should only be seen by other management with authorization to see your agency grievances.

### **Amendments:**

- Letters of Agreement signed by OSTA and OEA
  - Amendments made to the grievance during the step 2 meeting must be submitted in the system and attached to the grievance within 24 hours of the step 2 meeting.
  - The representative must notify the management designee at the time of the meeting of the needed amendments and pending submission of documentation.
  - Failure to put the management designee on notice and failure to submit within 24 hours of the grievance meeting will limit the grievance to only those contract articles and the remedy listed on the grievance at the time of the initial appeal.
- If amendments are made by OCSEA, FOP or SEIU after initial filing, management should note in step response.
  - If not argued at step 2 meeting, management should argue that grievance as filed should stand (i.e., articles and remedy should be limited to items listed on grievance).
- OCSEA does have an opportunity to add articles and amend remedy in the system when appealing a grievance from step 1 to step 2.

- Regardless, amendments are limited to the contract articles and remedy requested.

**Requesting grievances to be shared with others outside of the normal security roles (Management only):**

- Locate the desired grievance in OHgrievance
- Select “sharing”
- Select “Add”
- In the search field, select “user”
- Indicate the name of the user you wish to share the grievance with in the “for” field
- Click “save”, and you will see the user’s name added to the “user and group sharing” list for that grievance

**Additional Resources:**

For additional help with the GTS Electronic Filing System, please refer to the training webinar, which can be accessed through OAKS/ELM, the OCB website or your Union HQ website.

\*\*\*\*\*FOR OCB USE ONLY\*\*\*\*\*

[mgmt.trainee@das.state.oh.us](mailto:mgmt.trainee@das.state.oh.us) **Dasocb201\$**

[troc03@das.com](mailto:troc03@das.com) account welcome2016.