

Grievance - Copy

PA30

**Purpose** Use this procedure to copy a grievance record and preserve the history of the grievance.

**Trigger** Perform this procedure to track when a status change occurs to the grievance.

- Prerequisites**
- The grievance already exists.
  - You have received documentation of a change in the status of the grievance.

**End User Roles** In order to perform this transaction you must be assigned the following role:

- Decentralized Grievance Administrator

Change History	
Date	Change Description
12/2/2011	New procedure created.

**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Transaction Code** PA30

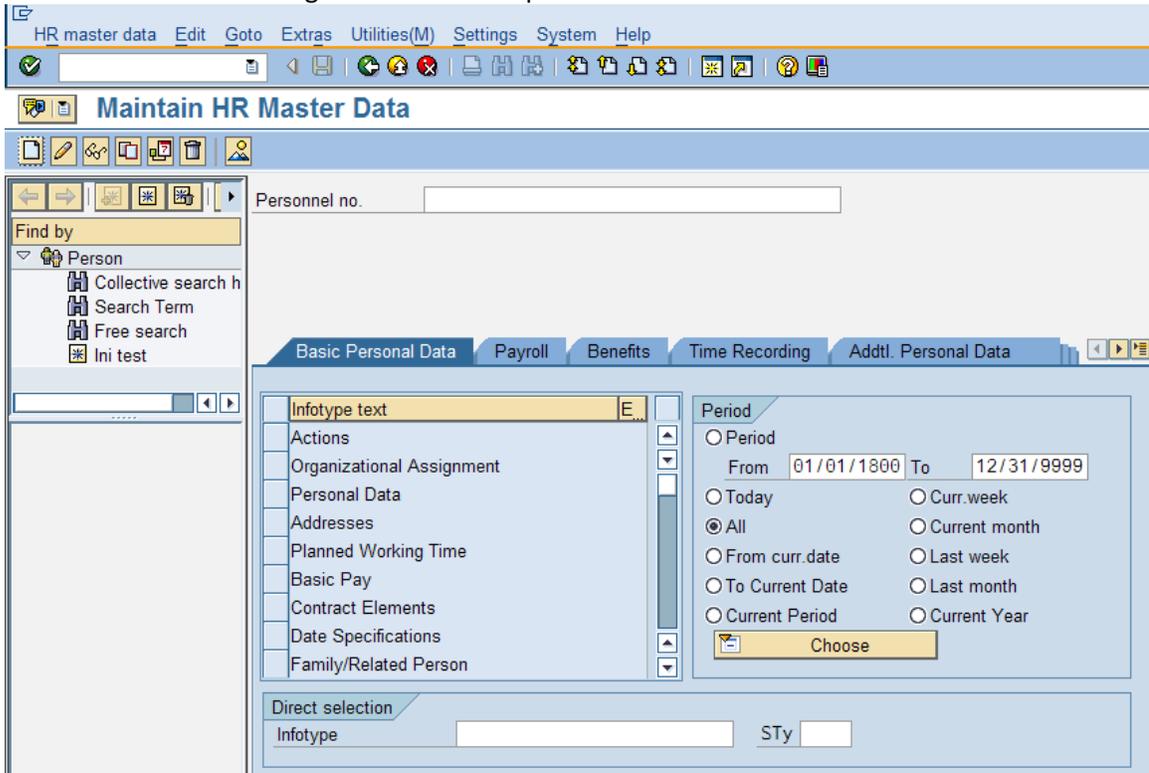
<p><b>Helpful Hints</b></p>	<p> Do not save or green check your entries as you go through each tab in the infotype. Instead, enter all the data available on all tabs and save when complete. This will avoid any HRMS errors and prevent you from having to rekey data.</p> <ul style="list-style-type: none"> <li>• Grievances must be entered for the previous month by the 10 of the following month. The Labor Relations Office (LRO) will access the information, compile data, and run reports thereafter.</li> </ul> <p> If you hit the  (<b>Save</b>) button before the grievance is complete, the incomplete required fields will be grayed out. You will need to click  (<b>Back</b>) and rekey the information.</p> <p><b>Note:</b> This infotype does not delimit records like other infotypes in HRMS. When copying grievance records, be sure to properly enter start and to (end) dates for steps/status changes to capture what actually happens with a particular grievance. Effective dating and properly copying records is the only way to preserve the history of a grievance.</p>
<p><b>Related Procedure</b></p>	<p><a href="#">Grievance - Change</a></p>
<p><b>Additional Resources</b></p>	<p><a href="#">Grievance Tracking Form – Agency Level Steps 1-3</a> - This form can be used as a guide in mapping out the dates that should be entered in at each step of the grievance.</p>

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

**Procedure**

1. Start the transaction using the above menu path or transaction code **PA30**.

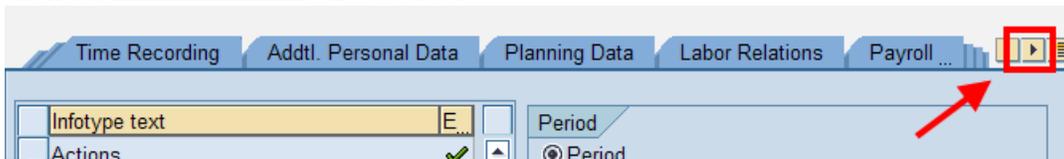


2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. <b>Example:</b> 4000094

3. Click  (Enter) to validate the information.

4. Click the **Labor Relations** tab to select.



 You will need to scroll to the right to select the tab.

5. Click to box to the left of **Labor Relations** to select.

- Click  (Overview) for an overview of all grievance activity in the *Labor Relations* (9102) infotype.

- Select the record you would like to copy by clicking blue box to the left of the record.

Start Date	End Date	G.	Di	Di	Ad	Ad	Ad	Ad	Ad	Grv Number	G	Enti	Grp	Grv No
06/16/2010	12/31/9999	01	02	10						Bell-06/16/2010				

8.  Click  (Copy) to copy and continue.
9. Select the tab and/or field you would like to update.  
For this procedure example, we will be updating the "Start" Date field.

**Common Scenario:** A grievance has been elevated to the next step. The most current grievance record will need to be copied and the "Start" date changed to reflect the appropriate date. The "To" (end Date) will remain 12/31/9999. You will then need to update all the appropriate fields in steps 10-13 below.

After the new "Copied" record has been updated, you will need to go back to the original grievance record and change the "To" date from 12/31/9999 to the appropriate date in the grievance process. (See the Grievance\_Change process for further instruction). **Note:** *This action will always need to be taken after copying a record. Only the most current record of the grievance will have a "To" date of 12/31/9999.*

10. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. <b>Example:</b> 12/01/2010
Responder	C	This is the individual responsible for responding to this step of the grievance.  Check to be sure the Responder is correctly identified. <b>Example:</b> 40000124

Personnel No. 40000094 Name BELL MISTY  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 12/01/2010 to 12/31/9999

Subtype 01 Issue Date Filed 06/16/2010  
 Discipline Type 02 Written Reprimand Grievance Number Bell-06/16/2010  
 Discipline Reason 10 Inappropriate Behav  
 Add.Discipl Reasons  [Discipl Reasons](#)  
 Group Grievance  
 Entire BU Griev.   
 Other Incorp Griev  [Griev #s](#)  
 Group Griev Pers #s  [Pers #s](#)  
 Responder 40000124 DOE 40000124 JOHN

11. Click the **Tracking** tab to select.
12. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Step	R	<p>This is used to indicate what step of the process the grievance is currently at. You will need to update this field each time you copy a grievance record.</p> <p> This will change several times during the lifetime of the grievance.</p> <p><b>Example:</b> Change the field from 1M (Step 1 Meeting) to 1R (Step 1 Response).</p>

13.  Continue to view the other tabs to update any other necessary information.



14. Click  (Enter) to validate the information.
15. Click  (Save) to save. You will be taken back to the List Labor Relations (Overview) screen.
16. You have completed this transaction.

Results
You have successfully updated (copy) a grievance in HRMS.
Comments
There is no particular order in which the grievance should be 'copied' or 'changed' when documenting the next step. OFM recommends when elevating a grievance to the next step, to copy the most current grievance record and make the updates as necessary. Then go back to your original grievance record (the record that was just copied) and change the "To" (End Date) field to the appropriate date. This will prevent data from being lost in the event that an error occurs.
For Example: A grievance is filed at 1M. The Step 1 meeting is scheduled and held on 7/01/2010 which then triggers a change in HRMS. First, copy the 1M record. In the new grievance record change the "Start" date to the appropriate date (in this example it is the date after the Step 1 meeting, 7/02/2010), the "To" (End Date) field will remain 12/31/9999. Then go to the tracking tab and change the Step from 1M to 1R. Go through the Grievance Info. and Contacts tabs to make any necessary updates. Click save and return to the "List Labor Relations" screen.

Next, select the 1M grievance record (the one you copied) and change the “To” (End Date) field to the appropriate date (in this example it is the date of the Step 1 meeting, 7/01/2010). Click save and return to the “List Labor Relations” screen.

This process should be used at any time a grievance is elevated from one step to the next. Below is a snapshot from the [HRMS Grievance Tracking Form](#) to give you an idea of what the dates will look like in relation to each step:

**Step 1:**

1M:

Start Date –	6/16/2010	To (End) Date –	<del>12/31/9999</del> 07/01/2010
Date Grievance is Filed	_____	Date of Step 1 Meeting	_____
		<i>(When changing the grievance, the end date will be changed from 12/31/9999 to the date of the step 1 meeting.)</i>	

1R:

Start Date –	07/02/2010	End Date –	12/31/9999
Date after Step 1 meeting	_____	Date Step 1 Response is Received by Union	_____
		<i>(This date will stay 12/31/9999 until the step 2m record is created.)</i>	