Chapter 6

Grievance Workload Tracking

Chapter Topics

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Using Grievance Workload Tracking

The basics of using Grievance Workload Tracking are in Chapter 2, which deals with managing your workload and finding a particular grievance to work. This chapter is intended to help you use this powerful search engine as a research tool. Depending on the search criteria you select, you can identify and access grievances that deal with a particular issue (see Grievance Code 3 in the descriptions beginning on page 6-7), grievances that were filed from a specific negotiating unit in a period of time (see NU and Filing Date), or those that fit any combination of the 42 search fields.

Access the Page

1.   On NYSTEP homepage, click on Grievances.

2.   Click on Grievances.

3.   Click on Use.

4.   Click on Grievances Workload Tracking.

NOTE: If you have TPM access, you may use the Work Load Tracking feature there by selecting **Grievances** as the Form.

Work with the Page

Selecting Criteria and Running the Query

REMINDER: Use Tab where directed. The Enter key serves no function in making your searches work.

This page will open the first time with a default set of fields arrayed in the Fields part of the page. Fields may be added or deleted by using the ⊞ and ⊟ boxes on the left side of the fields. To add a field, click ⊞, and then click 🔍 to identify the contents of the new field. To delete a field, click ⊟, and then click **OK** on the message box that appears to confirm the deletion.

1. On the left in the **Fields** part of the page, select a field that will assist you in finding the grievance(s) you seek.

2. If the field has a grayed out = after the field name, enter the value by which you want to search. Some fields have a 🔍 which allows you to select a value from a list. For example, ⊞⊟ Agency   = ▾ 08000 🔍 ▶▶ .

    ![note icon] **NOTE:**   In most fields, you can enter the first part of a criterion, such as the year or the year and negotiating unit of a **Tracking Number**. When you tab out, the system will add in **%** as a wild card so any case that has the same first numbers and meets whatever other criteria have been selected will appear in the results. For example,

    ⊞⊟ Tracking Number ⬉   = ▾ 200505% 🔍

    indicates grievances filed in 2005 involving 05 NU.

3. Tab out and then click on the now bolded ▶▶ to move the criterion to the Criteria area on the right.

4. If you want to delete a criterion that has been moved to the Criteria area, click on ◀◀ in the Fields area or click ⊟ next to the criterion to be deleted.
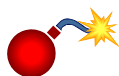
    ![bomb icon] **WARNING:** When using ◀◀ to delete if more than one set of criteria have been added for that field, the system deletes the most recently selected value.

5. If the field has an open box, [▾], select one of the operands from the drop down, then enter or select the value by which you want to search. For some fields, such as

Filing Date, you may select more than one set of criteria, but remember to move each set over *before* selecting another set for that field.

Operand Symbol	Means
<	Less than
<=	Less than or equal to
<>	Not equal to
=	Equal
>	Greater than
>=	Greater than or equal to

5. Once you have selected and moved all the criteria by which you want to search to the Criteria area, select either **Group By** or **Detail** to determine how the results will be displayed. **Group By** will present like results in groups, such as all the out-of-title work grievances for a specific title in one agency in one row, the grievances involving the same title in another agency in another row. **Detail** presents each result singly.
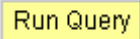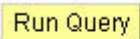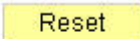
6. Press Run Query to run the criteria for matches.

7. If more than one grievant was entered for a case using the Multi-SSN check box, all the names on that grievance can be displayed by checking Use Multi-SSN Search Run Query   Reset   ☑ Use Multi-SSN Search . If the box is not checked, the system will return only one result, showing the name of the grievant on the Request page.

    If a search is done using Grievant Name, the system will automatically check Use Multi-SSN Search but the result will show only the name being search by.

    Please note that when the Use Multi-SSN Search box is selected, the number of grievances showing on the far right of the Detail Results-Grievance Requests blue bar may not be unique cases. For example, if a case had four named grievants, the system will count each grievant as one case even though it's only one Tracking Number.

Viewing the Results

When run for **Detail:**

1. The system will take you directly to the **Results** page where the following information will be arrayed in one continuum:

Detail Results - Grievance Requests

	Tracking #	Filing Date	Agency Name	Grievant Name	Job Title	SG	JC	NU	Location
1.									

Find | View All   First ◀ 1 of 1 ▶ Last

Existing Title	Alleged Title Code	Alleged Job Title	Class Action	Multi SSN	Grievance Status

8.   In the upper far right (use horizontal scroll bar to see it), the system will tell you how many results were returned. For example,

    Find | View 100   First ◀ 1-100 of 123 ▶ Last   shows that there were 123 results and the first 100 are on the current (first) page. To see the next page, you would click on ▶ or, since the next page is also the last, click on Last. ◀ and First take you to the previous and first page, respectively.
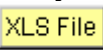
9.   When there are many results, you may sort them by as many as three fields as shown in the **Order By** section at the top of the results.

Order By

Field 1	Field 2	Field 3		
Filing Date	Q	Dsc	Tracking Number	Q	Dsc		Q		Sort	XLS File

    Using the 🔍, select your first criterion in Field 1, then select either Ascending or Descending Order for the sort.

10.   If you wish, you may select additional sort fields in Fields 2 and 3. The system will perform the sort with Field 1 taking precedence over Field 2 and Field 2 taking precedence over Field 3.

11.   When you have selected your sort criteria, press [Sort] and the system will sort the results.

12.   If you wish, the system will provide you with an Excel spreadsheet of the results. Simply press [XLS File]. The .xls file may be saved. To close, click on the x in the upper right of the spreadsheet window.

13.   To view any grievance, click on its **Tracking #**.

14. To refine the search, click on the **Criteria** tab and modify and or add the criteria by which you are searching.

When using **Group By:**

1. The system will return a summary of the results at the bottom of the **Criteria** page you used to create the search.

This search used the same criteria as the **Detail** one above. Note that there are 74 grouped results rather than the 123 individual results returned in the **Detail** search.
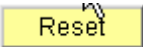
2. To see the details of any group, click on the field by which they are grouped, the one that is in blue and underlined. NYSTEP will take you to the **Results** page and display the details there.

3. The results may be sorted as described above.

4. To view any grievance, click on its **Tracking #**.

Entering a New Query

1. Click on the tab for the **Criteria** page.

2. Click on [Reset].

3. Enter your new search criteria.

Field Name	Description
Agency	Agency in which the alleged out-of-title work was performed
Agency Reference Number	Optional field for use by agencies that have own internal numbering system for grievances
Alleged JC	Jurisdictional class for the alleged appropriate title
Alleged Job Title	The title claimed to be appropriate for the grieved work
Alleged NU	Negotiating unit for alleged out-of-title work

Alleged SG	Salary grade for the alleged appropriate title
Alleged Title Code	Title code of for the alleged appropriate title
Appropriate/Reco TC	The code of the title found appropriate or recommended by C&C
Appropriate SG	The salary grade found appropriate or recommended by C&C
Assigned Analyst	The C&C Analyst to whom the grievance is assigned
Benchmark Flag	An indicator activated by C&C to denote a benchmark or precedent-setting grievance
CC Recommendation	Recommendation made by C&C to OER
CC Recommendation Date	Date C&C issued recommendation to OER
CC Section	Section in C&C to which grievance is assigned and routed by NYSTEP in accordance with agency assignments
Class Action	If value is Yes, denotes the grievance was filed for/by a class or group of similarly situated employees
Decision	Determination made by agency, C&C or OER
Decision Date	Date of decision
Division Bureau/Institution	Free-form field to identify the division, bureau, or institution in which the grieved employee(s) work
Existing Title	Indicates whether grieved assignment is alleged to be appropriate to an existing title or not
Filed By	Field to indicate whether grievance was filed by union or employee
Filing Date	Date on which the grievance was filed, **not** the date on which the grievance is entered into NYSTEP.
Grievance Code 1	Code selected by C&C to reflect the general nature of the alleged out-of-title work
Grievance Code 2	Code selected by C&C to reflect the duration of the alleged out-of-title work
Grievance Code 3	Code selected by C&C to reflect the specific issue of the alleged out-of-title work

Grievance History Status	Link that provides history as to what has been done on the grievance by whom and when
Grievance Status	Dynamic field indicating the status of the grievance in the out-of-title work grievance process
Grievant Name	Name of employee who grieved or for whom the grievance is filed by the union. May be the designee for a group of employees who are all part of the same grievance
JC	Jurisdictional classification of the position held by the person named as grievant
LR Rep Name	Name of the Labor Relations Representative to whom the grievance was assigned
Location Code	The code for the location where the grievant works
Multi SSN	When checked, indicates that the grievance involves more than one employee
NU	Negotiating unit of the position held by the person named as grievant
Request Date	Date the grievance is first saved or submitted on NYSTEP
Requestor User ID	NYSTEP User ID of the person who saved or submitted the grievance on NYSTEP
SG	Salary grade of the position held by the person named as grievant
SSN	Social Security Number of the employee named as grievant that is visible **only** to the agency employing the person at the time of the grievance. Used by NYSTEP to automatically populate fields such as grievant name, title, salary, etc.
Step	Step in the out-of-title work grievance process (e.g., Step 2 or Step 3)
Supervisor Name	Name of the person supervising the employee named as the grievant
Title Code	Title Code of the position held by the person named as grievant
Tracking Number	Number assigned by NYSTEP to identify the grievance. First 4 digits = calendar year in which filed; next 2 indicate the negotiating unit; the last 4 sequential beginning with 5000 each January 1st.

Union Rep Name	Name of the union representative who filed the grievance
Worklist Pending Request	Displays pending cases awaiting action by either agency, C&C, GOER