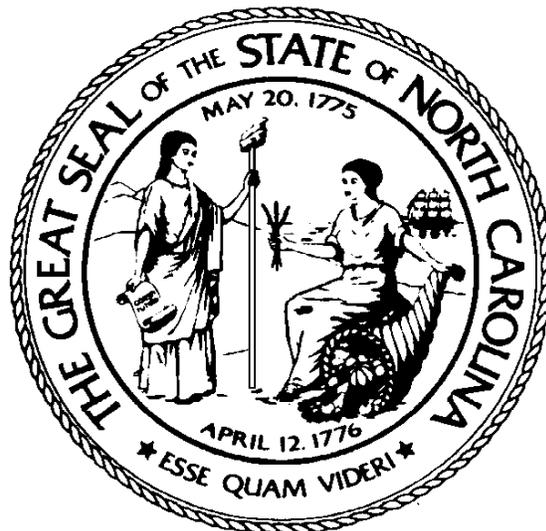


PA321

Create & Maintain Grievances

TRAINING COURSE



State of North Carolina

Office of the State Controller

February 22, 2016

For assistance with any TRAINING needs, contact:

The BEST Shared Services Team

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Introduction

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Grievance Record

Lesson 3: Course Review

Overview

DISCLAIMER

The State of North Carolina Employee Grievance Policy is still being reviewed and updated. Prior to implementing policy, students need to verify the most current changes by accessing updated materials at the following sites:

- **OSHR Policy Guide website**
 - <http://www.oshr.nc.gov/Guide/Policies/section7.pdf>
- **OSC HR/Payroll Training HELP website**
 - <http://www.osc.nc.gov/training/osctd/help/>
 - Personnel Administration > Job Aids > Grievance Maintainer

Welcome to the *Create & Maintain Grievances* - PA321 Virtual Class.

The security role is called the Grievance Maintainer. The focus of the class is on the transactions that pertain to specific infotypes on the employee's records. In the event that a correlating Workflow action (like a Suspension) needs to be entered as well, you must ensure that you communicate appropriately with the HR Master Data Maintainer to have those records entered.

The course introduction is an opportunity to get to know others who are attending class as well as to agree on courtesy for the training session. There will be at least one break during this session.

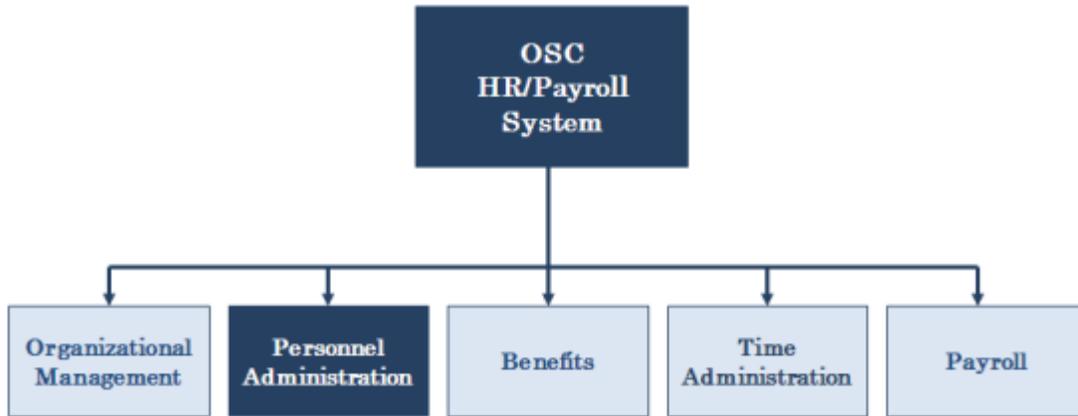
Pre-requisites

- VC101 - Virtual Classroom Overview

There is one prerequisite that you must take before attending this course. Taking this prerequisite ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Create & Maintain Grievances* course.

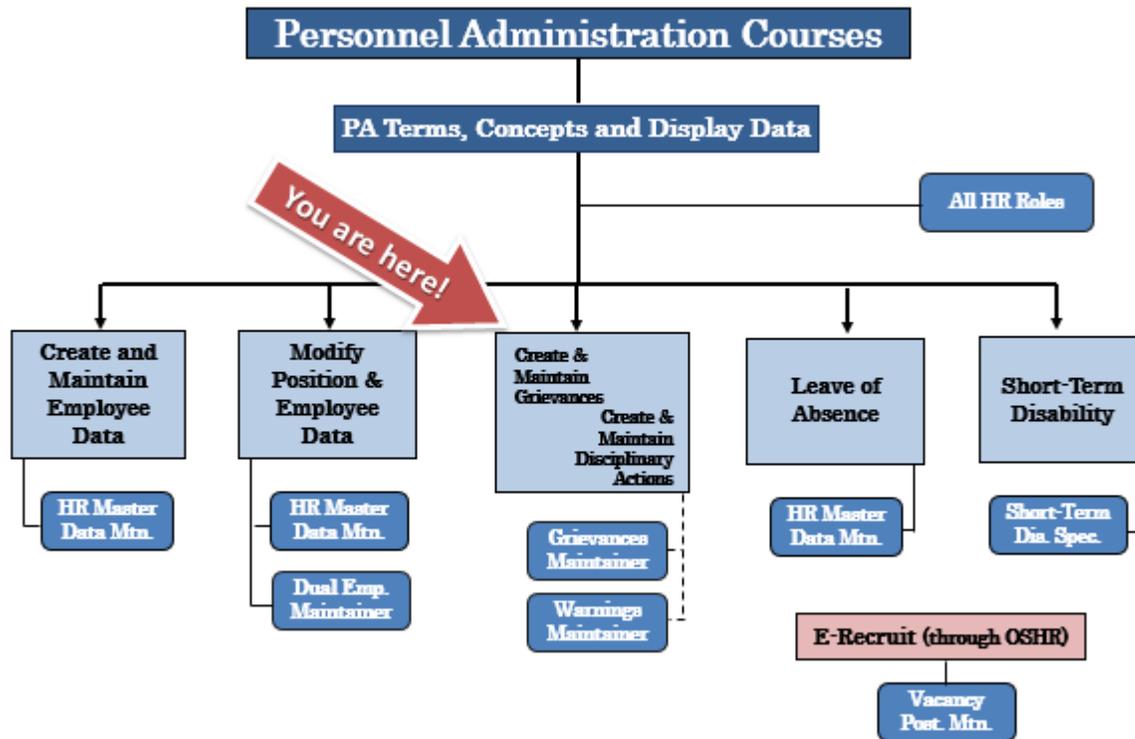
Virtual Classroom Overview (VC101) is an instructor-led course taught via the Internet.

OSC HR/Payroll Training Curriculum



The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the **Personnel Administration** module.

PA Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position determines which courses you may be required to attend.

Strategy for Training

Tell Me (Concepts)

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

Show Me (Demonstrations)

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

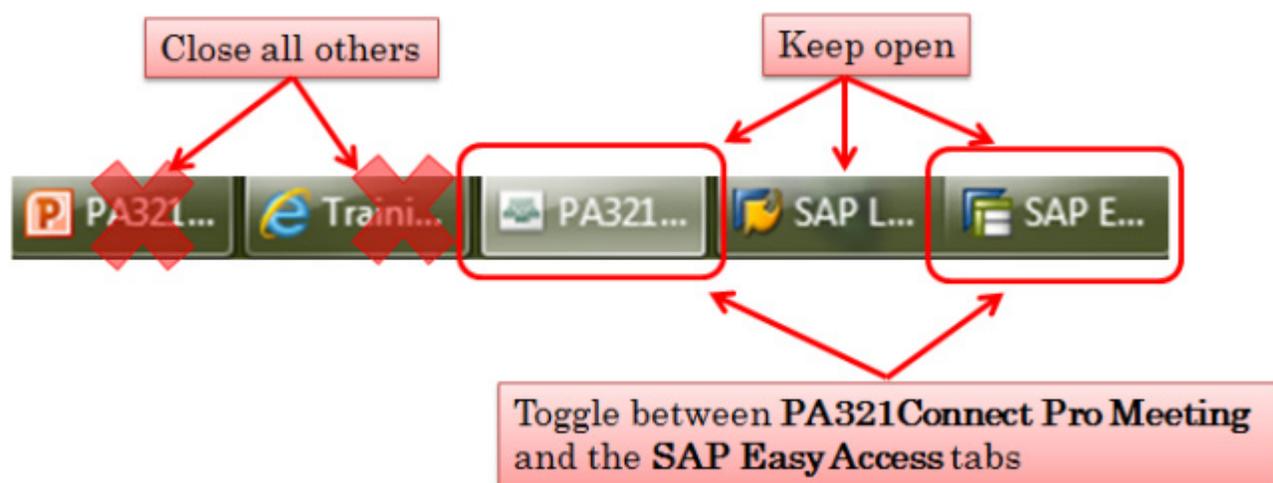
Let Me (Exercises)

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

Support Me (Availability)

- Instructor will be available to answer questions while the students complete the exercises

Performing Class Exercises



As discussed in *Virtual Classroom Navigation - VC101*, to perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Adobe Connect application. You will close some of the icons that display on your task bar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- PA321 Connect Pro Meeting
- SAP Easy Access screen

You will leave both of these open during the course. If you have other applications open, you should close them now.

Click the green check to let the Instructor know you see these two icons on your task bar.

After you complete a Virtual class exercise in the HR/Payroll system training client:

- Access the **PA321 Connect Pro Meeting** from your task bar.
- In the Participant’s panel, click the **green check** icon.
- Leave the **green check** active -- the instructor will clear it.



By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.

Instructor Demonstration

In this demonstration, the instructor will log on to the HR/Payroll system training client, enter the user name and password, and access the Easy Access screen.

After the Easy Access screen is accessed, notice that the Training Center icon title is now “**you are viewing Virtual Instructor’s application**” (instead of Training Center).

Note to instructor: Until you reach the Easy Access screen, the system doesn’t recognize that you are in the same application when the screen changes. Click the “select application” again from the Sharing icon. After you reach the Easy Access screen, this will no longer be an issue.

PRE-CLASS EXERCISE: Logging on to the HR/Payroll System

SCENARIO

You need to log into the HR/Payroll system. Use the steps below to log into the system

Instructions

1. Use the task bar to open a new Internet window.
2. Access the **HR/Payroll system portal** using your own User ID and password.
3. Click the Training GUI.
4. Click Training Sandbox client E1T 899. The SAP Easy Access screen displays.
 - If necessary, enter your own user ID and password again.
5. On the taskbar, **leave open** the **SAP Easy Access** screen and the **PA321 Connect Pro Meeting** tasks; **close** all other tasks.
6. Click the **PA321 Connect Pro** task on your taskbar to return to the PA Virtual Class.
7. Click the green check icon to let the Instructor know you have successfully logged on. The Instructor will remove the check.

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Terms, Concepts, and Infotypes Overview
- Lesson 2: Create and Maintain a Grievance Record
- Lesson 3: Course Review

The *Create & Maintain Grievances* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

Course Objectives

Upon completion of this course, you should be able to:

- Define key terms and concepts
- Describe the OSC HR/Payroll system grievance processes
- View, create and maintain a grievance
- Identify how to access the Grievance reports

Reference Materials

- Student Guide
- Job Aids
- Other Resources
 - OSHR Employee Grievance Policy
 - *What's New*
 - Online help - from the SAP portal
 - Work instructions - Business Process Procedures (BPPs)

The materials above can be accessed through the OSC Training HELP website. Use the following link to access the HELP website:

<http://www.osc.nc.gov/training/osctd/help/>

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module with regard to Grievance records. This course will provide you with demonstration and practice for creating and modifying actions and records.

Terms, Concepts and Infotypes Overview

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Grievance Record

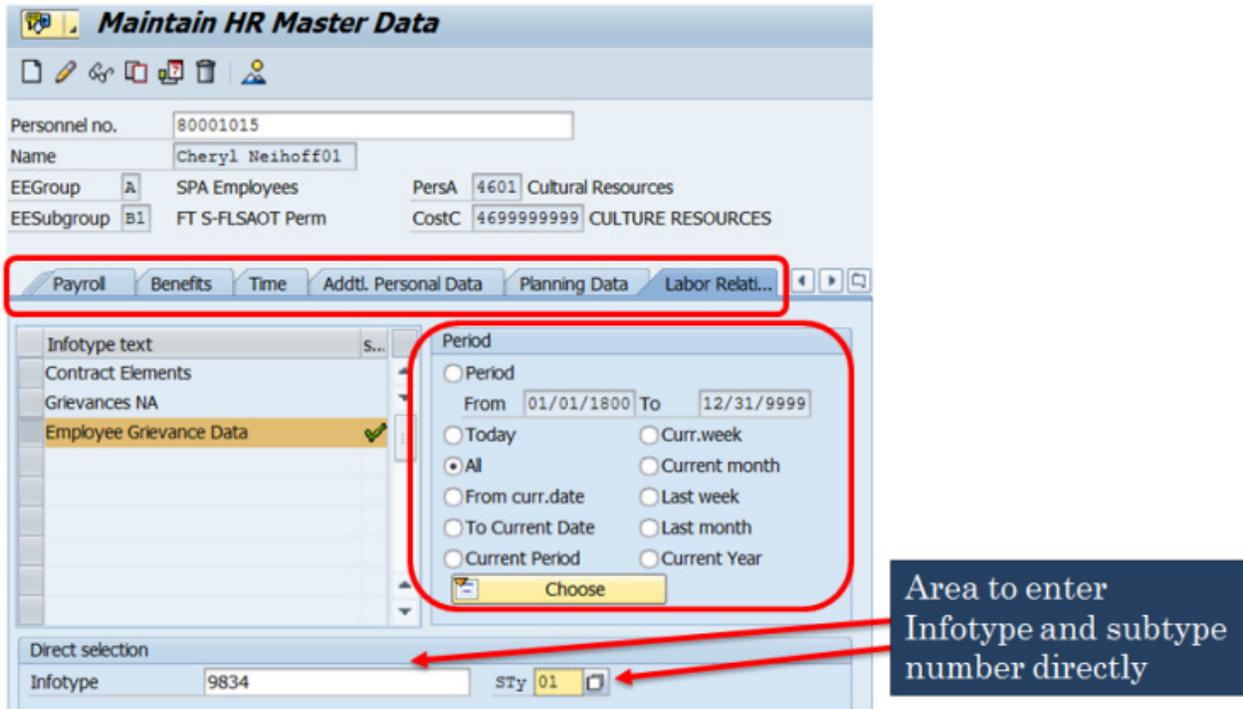
Lesson 3: Course Review

Lesson 1 Objectives

Upon completion of this lesson, you should be able to:

- Identify the transaction codes used to maintain a Grievance record
- Identify the applicable infotype and subtypes
- Discuss how to create a reminder to follow-up on a Grievance
- Identify the various functions used to view or maintain Grievance records
- Discuss the application of validity periods and how records are ended

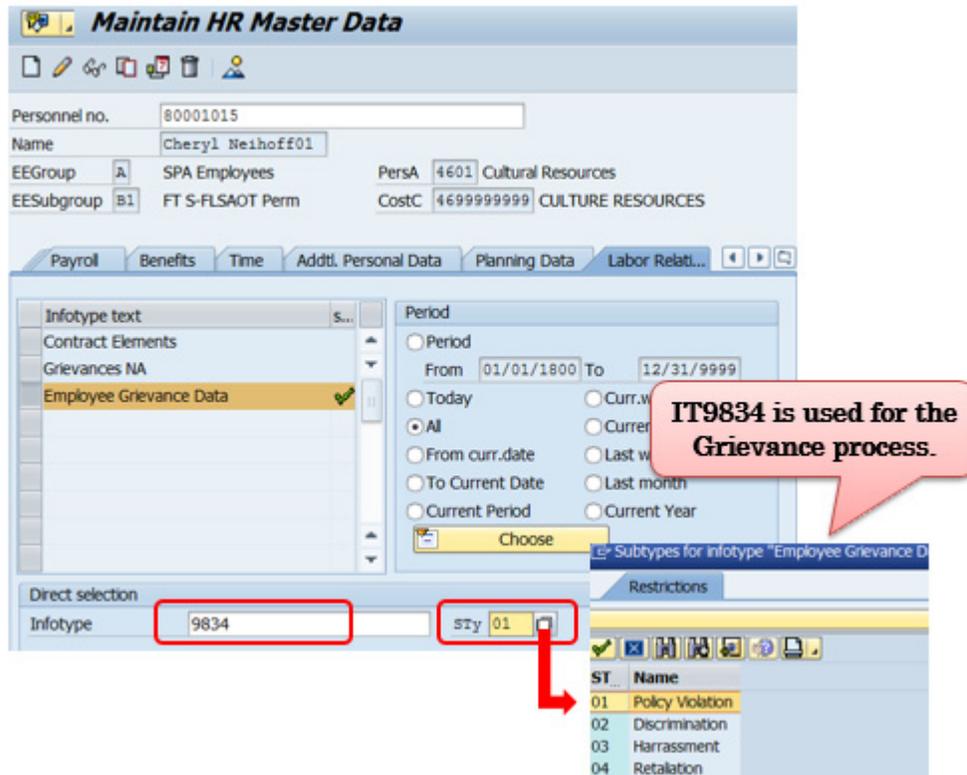
PA30 - Maintain Master Data



You may recall from *Personnel Administration Terms, Concepts and Display Data* (PA210), transaction code PA20 is used to view individual infotypes. PA30 is the transaction code used to create and maintain Grievances. There are several options available when you access PA30 which include:

- **Tabs:** The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access or use the display All tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.
 - 📁 Not all infotypes are in tabs.
- **Period:** You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will only display if the All option has been selected.
 - 📁 **NOTE:** When displaying records, no change is necessary to the period selection.
- **Direct Selection:** You can either enter the infotype code and subtype in the Direct Selection field or use the matchcode to search for the infotype and subtype.
 - 📁 **NOTE:** PA20 can be used to only view (not maintain) the employee’s prior grievance or history.

Infotype for Grievance Process



As indicated in a previous course, employee master data is organized into **infotypes** or screens of data. Some infotypes have additional screens, called **subtypes**. Infotypes and subtypes are important concepts in the grievance process.

The Employee Grievance Data (IT9834) infotype is used to track grievances. The Grievance NA (IT0102) infotype was used until 11/30/2013.

NOTE: Effective 12/1/2013 IT0102 will no longer be used for grievances. However, it will be used to update grievances prior to 12/1/2013.

Monitoring of Tasks (IT0019)

Additional text icon displays after comments are written

Task Type →

Date of Task →

Reminder Date →

Lead/Follow-up time →

Comments →

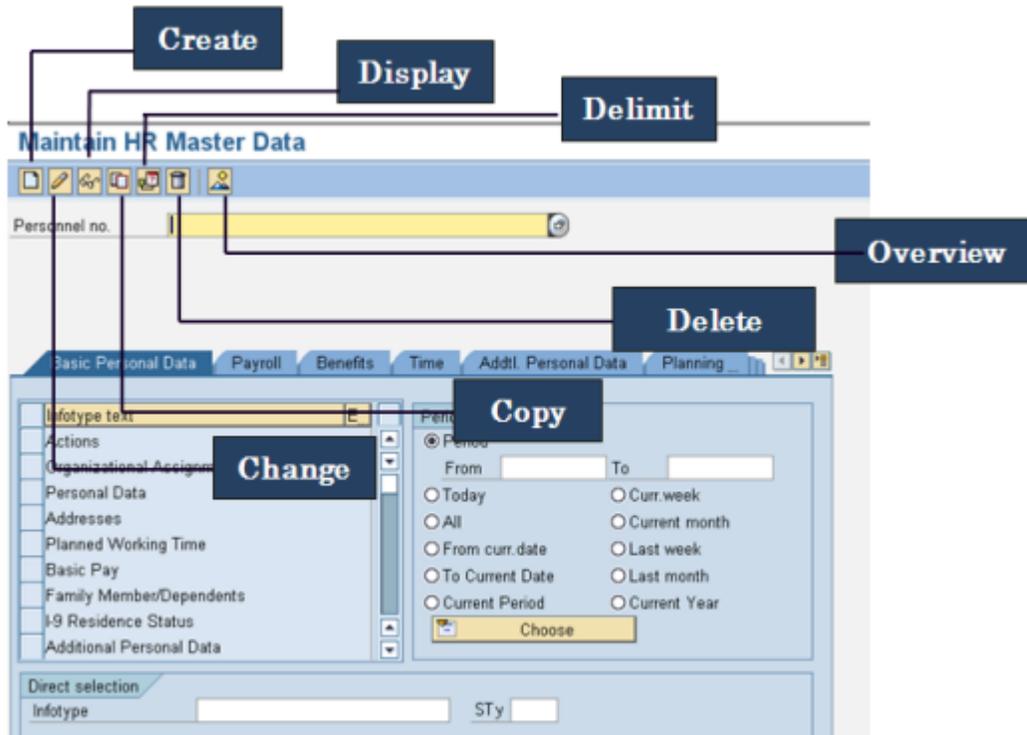
The Monitoring of Tasks IT0019 displays automatically as part of the grievance process.

In a previous course, IT0019 was described like a tickler file that is date-driven. A report is run to see which employees have transactions coming due soon. Run BI report B0099 or the Date Monitoring report (S_PH0_48000450) in the HR/Payroll system to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype. You may need to enter more than one IT0019 for a transaction. For example, if an employee files a grievance for a suspension without pay, you would perhaps want to follow up within 10 days. But you would also want to make sure the grievance is resolved within 90 days, so you need IT0019 for both dates. It is important to use IT0019 so you can run a report to find the pending records.

The following fields are to be completed:

- **Task type:** Select applicable task type. For a grievable issue, you should select the appropriate task type. Grievances have various task types.
- **Date of task:** The date of the first scheduled review; re-created for each subsequent review and the final resolution of the record.
- **Reminder date:** The date you need to be reminded that the task is about to be due. Enter or allow the HR/Payroll system to suggest a date.
- **Comments:** Enter additional details necessary to document the grievable issue. Observe that when you enter comments the Additional text icon displays on the infotype. Go to the Menu and click on Edit > Maintain Text to add your comments.
- **Lead/follow-up time:** Used to re-program the reminder date

Description of Buttons



There are several ways to Maintain Master Data as listed below.

- **Create:** Create a new infotype for an existing employee.
- **Change:** You can correct/revise using the Change (pencil) function.
- **NOTE:** Infotype 9834 is the only infotype in the Grievance process on which you should use the Change (pencil) function.
- **Delete:** Eliminate a record.

You must contact BEST Shared Services and ask them to delete an IT9834 – Employee Grievance Data record. Only BEST can perform this function. (OSHR approval required)

- **Delimit:** Enter an end date on an infotype to make it inactive.
- **Copy:** Create a duplicate record to modify with needed changes and maintains history.
- **Display:** View an individual infotype.
- **Overview:** View a list or summary of the infotype's data.

Copy and Change Options

Copy: Create another record to ensure that history is maintained. Unlike other Personnel Administration infotypes, you cannot use the Copy function with the same dates to correct errors.

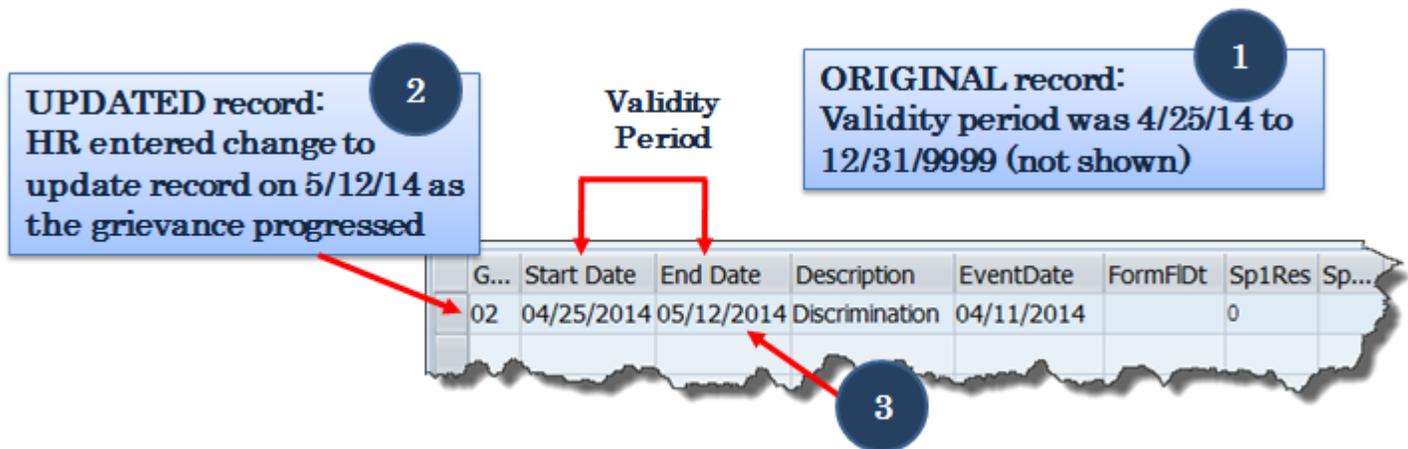
Change (pencil): **Be extremely careful** when using the Change function. Unlike other Personnel Administration (PA) infotypes, it is sometimes necessary to use Change to correct errors in IT9834. If you used the Copy function instead of Change, you will create another record, even though you are using the same effective date.

You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

Please note that permission is granted to only use the Change function on IT9834.

The rule that you are to use the Copy function and never the pencil for all other PA infotypes is still applicable.

Entering End Dates



All records must have a beginning (start) date and an ending date, a time span that is called the **validity period**. When an end date is entered, the record is **delimited** (no longer active). For Grievances records, the end date will **always be manually entered** by the Maintainer.

NOTE: In other HR functions, the end date can either be automatically created by the HR/Payroll system when a new record with a new effective date is entered or entered manually by HR. The ending date on IT9834 is entered as follows:

- **Grievance:** leave the end date as 12/31/9999 until it is resolved or has progressed through all available steps/appeals. At that time, OSHR will delimit the record. Although policy dictates a set number of days for resolution for grievances, you should not enter those dates when you initially create the infotype. For example, an employee files a grievance on 4/1/14 for suspension without pay, which has 90 days per policy. When you create the grievance, the validity period is 4/1/14 – 12/31/9999. You create IT0019 with a reminder for 90 days. When the grievance progresses to the next step or is resolved, whether within 2 days of the initial filing, or the entire 90 days, you go back and delimit the initial infotype. Use IT0019 to remind you to follow the transaction carefully so that the proper end date is applied as the transaction either continues in the process or is resolved.

It is crucial to understand the concept of validity periods, how history is preserved and when it is applicable to apply the end date.

KNOWLEDGE CHECK

Question	Answer
1. All records must have a beginning (start) date and an ending date, a time span that is called the ____.	
2. Infotypes and ____ are important concepts in the grievance process.	
3. You must contact ____ to request they delete an IT9834 – Employee Grievance Data record.	
4. Infotype ____ is used to track grievances.	
5. On a Grievance, leave the end date as 12/31/9999 until it is resolved or has progressed through all available ____.	

SUMMARY

In this lesson you learned to:

- Identify the transaction codes used to maintain a Grievance record
- Identify the applicable infotype and subtypes
- Discuss how to create a reminder to follow-up on a Grievance
- Identify the various functions used to view or maintain Grievance records
- Discuss the application of validity periods and how records are ended

Create and Maintain a Grievance Record

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Grievance Record

Lesson 3: Course Review

Lesson 2 Objectives

Upon completion of this lesson, you should be able to:

- Enter grievance data as events occur.
- Provide employee grievance data to OSHR as requested.

State of North Carolina Grievance Policy

It is the policy of North Carolina State government that a grievance process exist to allow for prompt, fair and orderly resolution of grievances arising out of employment. Each agency shall adopt the Employee Grievance Policy as approved by the State Human Resources Commission.

This infotype job aid is being updated as of February 2015 in order to modify process steps and add policy compliance information.

Data must be entered the day an event occurs. *The 15-calendar day clock starts the day after the alleged event took place.*

End dates must be entered after resolution at each step. For example – if a potential grievance is resolved at the Informal Discussion step the end date must be entered.

The purpose of this infotype is to track and report events occurring in the EEO Informal Complaint and Grievance process, and the Policy Violation Grievance process beginning with the informal complaint step through the disposition of a complaint at the Office of Administrative Hearings (OAH).

The data captured will reflect the State's activity for employee complaints and grievances. The data will also be used to determine training and/or education needs for employees.

The Employee Grievance Policy link is: http://www.oshr.nc.gov/Guide/Policies/7_Discipline.%20Appeals%20and%20Grievances/Employee%20Grievance%20Policy.pdf

STATE HUMAN RESOURCES MANUAL

Discipline/Appeals/Grievances
Section 7, Page 26
Effective Date: December 1, 2013**Employee Grievance Policy (continued)****Policy**

It is the policy of North Carolina State government that a grievance process exist to allow for prompt, fair and orderly resolution of grievances arising out of employment. Each agency shall adopt the Employee Grievance Policy as approved by the State Human Resources Commission.

Objectives

In establishing this Employee Grievance Policy, the State Human Resources Commission seeks to achieve the following objectives:

- Provide procedural consistency across the agencies of NC State government;
- Ensure employees have access to grievance procedures to address grievable issues timely, fairly, and without fear of reprisal; and
- Resolve workplace issues efficiently and effectively.

Summary of Employee Grievance Policy

A formal grievance or compliant must be filed within 15 calendar days of the alleged event or action that is the basis of the grievance. The 15 Calendar day clock starts the day after the alleged event took place. Unlawful discrimination, harassment or retaliation complaints must be filed under the Equal Employment Opportunity (EEO) Informal Inquiry process before proceeding to the formal internal grievance process. All other grievable issues must first be discussed with the immediate or other appropriate supervisor in the employee's chain of command or other appropriate personnel that has jurisdiction regarding the alleged event or action that is the basis of the grievance prior to filing a formal grievance with the exception of disciplinary action grievances. Disciplinary action grievances as well as separation due to unavailability shall proceed directly to the formal internal grievance process. For additional information regarding the Employee Grievance Policy please use the following link:

http://www.oshr.nc.gov/Guide/Policies/7_Discipline,%20Appeals%20and%20Grievances/Employee%20Appeals%20and%20Grievances.pdf

Informal Grievance Process

Informal Grievance Process	
Informal Discussion or with Supervisor or Appropriate Manager Equal Employment Opportunity Informal Inquiry Check to see if grievance rises to the level of an unlawful act Employee Files Formal Grievance if the Issue is Not Resolved	Within: 15 Calendar Days of the Alleged Event or Action

Formal Internal Grievance Process

Formal Internal Grievance Process	
Step 1: Mediation	Within: 35 Calendar Days
Employee Files Step 2	Within: 5 Calendar Days
Step 2: Employee Presents Grievance to Hearing Officer/Panel Hearing Officer/Panel Makes Proposed Recommendation to the Director of State Human Resources	Within: 35 Calendar Days
Director of State Human Resources Reviews Proposed Recommendation and Approves as Written or Returns with Recommendations for Modification or Reversal	Within: 10 Calendar Days
Agency Head Renders Final Agency Decision (FAD)	Within: 5 Calendar Days
Formal Internal Grievance Process Completed	Within: 90 Calendar Days

External Appeal Process

External Appeal Process	
Employee May Petition for a Contested Case Hearing with OAH if Issue is Appealable	Within: 30 Calendar Days of the FAD

Additional Resource
Refer to the following website for more information about creating and maintaining a Grievance record: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Grievance Job Aid: <i>Personnel Administration > Job Aids > Grievance Maintainer</i>

Details of Employee Grievance Policy

Infotype 9834

Create Employee Grievance Data (9834)

Personnel No: 1823330 Name: Lilly Ann Small

EEGroup: A SPA Employees PersA: 1201 Insurance

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 02/09/2015 To: 12/31/9999 Record Complete

Employee Grievance Data

Grievable Issue: 01 Policy Violation Date of Alleged Event or Action:

Policy Violation Action	Discrimination Action	Discrimination Basis
<input type="checkbox"/> Dismissal	<input type="checkbox"/> Hiring	<input type="checkbox"/> Race
<input type="checkbox"/> Demotion	<input type="checkbox"/> Promotion	<input type="checkbox"/> Religion
<input type="checkbox"/> Suspension without Pay	<input type="checkbox"/> Demotion	<input type="checkbox"/> Color
<input type="checkbox"/> Unavailability Separation	<input type="checkbox"/> Compensation	<input type="checkbox"/> National Origin
<input type="checkbox"/> Inaccurate & Misleading	<input type="checkbox"/> Written Warning	<input type="checkbox"/> Sex
<input type="checkbox"/> Overall Performance Rating	<input type="checkbox"/> Work Assignments	<input type="checkbox"/> Age
<input type="checkbox"/> Priority Promotion	<input type="checkbox"/> Overall Performance Rating	<input type="checkbox"/> Disability
<input type="checkbox"/> Priority Reemployment	<input type="checkbox"/> Suspension without Pay	<input type="checkbox"/> Genetic Information
<input type="checkbox"/> Veterans Preference	<input type="checkbox"/> Reasonable Accommodation	<input type="checkbox"/> Political Affiliation

Informal Process

Informal Step Taken: Date Informal Completed:

Formal Grievance Filed?: Grievance Filed Timely?: Date Formal Grievance Filed:

Step1

Step 1 Result/Mediation: Date Step 1 Completed:

Step2

Step 2 Filed?: OSHR Reviewed FAD:

Step 2 Result/FAD: Date FAD Issued: FAD Exceeded Timeline:

OAH - To be Completed by OSHR

Appealed to OAH?: OAH Filing Date: OAH Deadline:

OAH Case Number: OAH Case Status:

OAH Remand Back To Agency: Remand Date:

OAH Final Decision: Decision Date:

Grievable Issue

The first entry in each record will be the Grievable Issue which is the basis for the grievance. There are four possible entries for the Grievable Issue:

- Policy Violation (01)
- Discrimination (02)
- Harassment (03)
- Retaliation (04)

For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected. The record will not allow you to save unless you have checked an item in the appropriate box.

The check box entries you must make for each grievable issue are as follows:

Policy Violation

- Must make one selection from the Policy Violation Action box.
- Do not make any selections in the Discrimination Action or the Discrimination Basis boxes.

Policy Violation Action	
<input type="checkbox"/> Dismissal	<input type="checkbox"/> Failure to Post
<input type="checkbox"/> Demotion	<input type="checkbox"/> "Whistle Blower"
<input type="checkbox"/> Suspension without Pay	
<input type="checkbox"/> Unavailability Separation	
<input type="checkbox"/> Inaccurate & Misleading	
<input type="checkbox"/> Overall Performance Rating	
<input type="checkbox"/> Priority Promotion	
<input type="checkbox"/> Priority Reemployment	
<input type="checkbox"/> Veterans Preference	

Discrimination

- Must make one selection from the Discrimination Action box **and** at least one selection from the Discrimination Basis box.
- Do not make any selections from the Policy Violation Action box.

Discrimination Action	Discrimination Basis
<input type="checkbox"/> Hiring	<input type="checkbox"/> Race
<input type="checkbox"/> Promotion	<input type="checkbox"/> Religion
<input type="checkbox"/> Demotion	<input type="checkbox"/> Color
<input type="checkbox"/> Compensation	<input type="checkbox"/> National Origin
<input type="checkbox"/> Written Warning	<input type="checkbox"/> Sex
<input type="checkbox"/> Work Assignments	<input type="checkbox"/> Age
<input type="checkbox"/> Overall Performance Rating	<input type="checkbox"/> Disability
<input type="checkbox"/> Suspension without Pay	<input type="checkbox"/> Genetic Information
<input type="checkbox"/> Reasonable Accommodation	<input type="checkbox"/> Political Affiliation
<input type="checkbox"/> RIF	
<input type="checkbox"/> Training	
<input type="checkbox"/> Dismissal	

Harassment

- Must make at least one selection from the Discrimination Basis box.
- Do not make any selections from the Policy Violation Action or the Discrimination Action boxes.

Discrimination Basis
<input type="checkbox"/> Race
<input type="checkbox"/> Religion
<input type="checkbox"/> Color
<input type="checkbox"/> National Origin
<input type="checkbox"/> Sex
<input type="checkbox"/> Age
<input type="checkbox"/> Disability
<input type="checkbox"/> Genetic Information
<input type="checkbox"/> Political Affiliation

Retaliation

- Must make one selection from the Discrimination Action box.
- Do not make any selections from the Policy Violation Action or Discrimination Basis boxes.

Discrimination Action
<input type="checkbox"/> Hiring
<input type="checkbox"/> Promotion
<input type="checkbox"/> Demotion
<input type="checkbox"/> Compensation
<input type="checkbox"/> Written Warning
<input type="checkbox"/> Work Assignments
<input type="checkbox"/> Overall Performance Rating
<input type="checkbox"/> Suspension without Pay
<input type="checkbox"/> Reasonable Accommodation
<input type="checkbox"/> RIF
<input type="checkbox"/> Training
<input type="checkbox"/> Dismissal

Date of Alleged Event or Action

1. Enter the date of the alleged event or action.

Date of Alleged Event or Action	04/11/2014
---------------------------------	------------

The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the time frames for the entire grievance process.

EXERCISE 3.1: Create a Grievance Record

SCENARIO

Cheryl Neihoff is currently a Art Handler for the Department of Cultural Resources. She applied for a Museum Technician position in her department. She received an interview on December 3rd; however, she was not selected for the position. Management selected a person who was not a current State Employee that had no prior state government experience.

Ms. Neihoff received her denial letter on December 12th. On December 13th, she followed the State of NC Employee Grievance Policy by requesting an informal discussion. During the informal discussion, Ms. Neihoff asked her supervisor why she did not receive the promotion. Ms. Neihoff was not satisfied with the response from her supervisor. Her Supervisor followed the conversation with a written summary of what they had discussed (Per policy) This written documentation must be signed or initiated by the employee. The Supervisor had indicated that she felt she had made a correct hiring decision.

Ms. Neihoff made the decision to file a formal internal grievance the following day because she did not feel that the situation was satisfactorily resolved.

CAUTION: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

PART A: CREATE IT9834 - EMPLOYEE GRIEVANCE DATA

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder > Job Aids > Grievance Maintainer*.

Infotype 9834 must be created in the system to track the grievance process.

You are currently on the SAP Easy Access screen.

2. Enter transaction code **PA30** in the Command field and click .
3. Enter the **personnel number** from the table below based on the student ID your instructor assigns you.

PERNR: Cheryl Neihoff							
A	80001015	F	80001020	K	80001025	P	80001030
B	80001016	G	80001021	L	80001026	Q	80001031
C	80001017	H	80001022	M	80001027	R	80001032
D	80001018	I	80001023	N	80001028	Inst 1	80001033
E	80001019	J	80001024	O	80001029	Inst 2	80001034

4. Click **Enter** on the keyboard to validate your entry.
5. Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	01 - Policy Violation

6. Click or press **Enter** on the keyboard to validate your entry.
7. Click the **Create**  button to begin a new Grievance record.
8. Complete the following fields:

Field	Value
Start	December 17, <current year>  CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave 12/31/9999
Action/Basis Boxes	Policy Violation Action <ul style="list-style-type: none"> • Priority Promotion For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected.  The record will not allow you to save unless you have checked an item in the appropriate box.

<p>Date of Alleged Event or Action</p>	<p>December 12, <current year></p> <p>The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the time frames for the entire grievance process.</p>
---	---

9. Click or press **Enter**  to validate your changes.
10. Click the **Save**  button to save the record creation.

PART B: CHANGE IT9834 - INFORMAL STEP TAKEN

STATUS

Ms. Neihoff met with her supervisor on December 13th to discuss her concerns about not receiving the position. After the discussion, Ms. Neihoff's supervisor responded to Ms. Neihoff in a memo and sent a copy to Human Resources, as instructed in the grievance policy.

The IT9834 record must reflect Ms. Neihoff's informal discussion with her supervisor.

11. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Unresolved, Informal Discussion
Date Informal Completed	December 13th, <current year>

The Date Informal Completed is the date of the written response of the outcome of the Informal Discussion or the date of the written response from the EEO Informal Inquiry to the complainant.

 **NOTE:** A date must be recorded for both resolved and unresolved outcomes.

12. Click the **Enter**  button.
13. Click the **Save**  button.

PART C: CHANGE IT9834 - DATE FORMAL GRIEVANCE FILED

STATUS

You received a copy of Ms. Neihoff's formal grievance Step 1-Mediation on December 14th. Her grievance was timely filed.

The IT9834 record must be updated to reflect when Ms. Neihoff filed a formal grievance.

14. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Formal Grievance Filed?	Yes
Date Formal Grievance Filed	December 14th, <current year>

The Date Formal Grievance Filed is the date that the formal grievance was filed with the agency following the Informal Discussion or EEO Informal Inquiry. The grievance must be filed within 15 calendar days of the Date of the Alleged Event or Action or the date of receiving the conclusions of the EEO Informal Inquiry. The 15 Calendar day clock starts the day after the alleged event took place.

A grievance may not be filed unless one of the informal processes has been completed and the grievance is filed within the 15 calendar day time frame. Not all grievances require an informal step first. Examples include (but are not limited to) Disciplinary Action or Separation due to Unavailability/Unavailable to Work.

If the grievance is filed within 15 calendar days of the Date of the Alleged Event or Action for policy violations or Date of the Written response for the EEO Informal Inquiry, it is timely. The grievance may proceed.

If the grievance is filed at any date after the 15 calendar day time frame, it is untimely. The grievance may not proceed.

The *Grievance Filed Timely* field is grayed out and will calculate automatically.

15. Click the **Enter**  button.
16. Click the **Save**  button.

PART D: CHANGE IT9834 - DATE FORMAL GRIEVANCE FILED

STATUS

The Step 1 Mediation was held December 22nd. You were notified by copy of the Mediation Impasse paperwork that the results of Ms. Neihoff's Step 1-Mediation was a impasse.

The IT9834 record must be updated to reflect that Ms. Neihoff and an agency respondent attended a Mediation session held on Dec. 22nd.

17. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 1 Result/Mediation	Impasse
Date Step 1 Completed	December 22nd, <current year>

Step 1 is Mediation. The results of mediation will be one of the following:

- **Resolution** An agreement was reached. The grievance has ended.
- **Impasse** No agreement was reached. The grievant may file Step 2 within 5 calendar days.
- **Withdrawn** The grievant chose to withdraw the grievance. The grievance has ended.
- **Postponed** The mediation was postponed due to extenuating circumstances.
- **No Show** The grievant did not attend the mediation. The grievance has ended.
- **Untimely** The grievant did not file within the designated timeframe requirement.

A grievant who does not attend the mediation (i.e. no show) forfeits the right to proceed with the internal grievance process.

For Resolution, Impasse and No Show Step 1 results, the Date Step 1 Completed will be the last date of mediation.

 **NOTE:** For Resolution, Withdrawn, No Show and Untimely, the record should be delimited.

For Withdrawn and Postponed Step 1 results, the Date Step 1 Completed will be the date that the grievant withdrew the grievance or the date the agency agreed to postpone the mediation.

For Untimely Step 1 Results, the Date Step 1 Completed will be the date of the filing deadline.

If a grievance is resumed or withdrawn after postponement, the Step 1-Result and Date Step 1 Completed entries will be changed to reflect the new outcome.

It is important to include this date for all Step 1 results.

Additional Resource

For additional information about examples of comments to include on the Grievance infotype, go to the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/index.html>

Follow the following path to access the latest version of the job aids:

Personnel Administration > Job Aids

- Grievance Maintainer

18. Click the **Enter**  button.

19. Click the **Save**  button.

PART E: CHANGE IT9834 - STEP 2 HEARING

STATUS

After the Step1-Mediation resulted in an impasse, Ms. Neihoff decided to file for a Step 2-Hearing. You receive a copy of her appeal for Step-2 Hearing on December 30th, it was timely filed.

The IT9834 record must be updated to reflect that Ms. Neihoff’s mediation resulted in an impasse. Ms. Neihoff made the decision to file for a Step 2 Hearing on Dec. 30th.

20. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 2 Filed?	Yes  CRITICAL: It is imperative that this field be completed with a Yes or No following each impasse entry.

If Step 2 is filed within 5 calendar days of the date of mediation, it is timely. The grievance may proceed.

If Step 2 is filed at any date after the 5 calendar day time frame, it is untimely. The grievance may not proceed. An Untimely filing of a Step 2 Grievance is a grievance filed after the 5 Calendar day filing deadline has expired. You must notify the employee in writing.

21. Click the **Enter**  button.
22. Click the **Save**  button.

PART F: CHANGE IT9834 - STEP 2 RESULTS/FAD

STATUS

You received a copy of Ms. Neihoff's Step 2-Hearing decision that was held on January 13th. The decision was upheld.

The IT9834 record must be updated to reflect that a hearing was held on January 13th.

23. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 2 Result/FAD	Upheld
Date FAD Issued	1-13- <next year>
OSHR Reviewed	Yes

EXERCISE 3.2: Create a Discrimination (Race/Age) Grievance Record

SCENARIO

The North Carolina Department of Administration, EEO Office received a timely complaint filed on April 25th from Facility Electrician James (Jimmy) C. Kracklin (Black/Age 60) against Lead Facility Maintenance Supervisor Dalton K. Samuels (White/Age 37) for alleged discrimination based on race and age.

On March 28th while working on the Department of Commerce campus, Samuels called Kracklin “Jimmy Crack Corn.” Kracklin told Samuels the phrase sounded racist to him. Kracklin claimed Samuels looked the phrase up on the Internet and found it was a song about slaves but never apologized. Also, Samuels referred to Kracklin, Electronics Tech Alvin Greene (White/ Age 65), and Electronics Tech Johnny Craven (White/Age 51) as his “geriatric crew”. He has heard the term used more than once. He last heard it on April 11th. Kracklin submitted a request to move to a new team that was working on a project of interest to him. His request was denied. Kracklin filed a grievance for discrimination.

REMEMBER: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

PART A: CREATE IT9834 - EMPLOYEE GRIEVANCE DATA

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder > Job Aids > Grievance Maintainer*.

You are currently on the SAP Easy Access screen.

1. Enter transaction code **PA30** in the Command field and click .
2. Enter the **personnel number** from the table below based on the student ID your instructor assigned you.

PERNR: <i>Jimmy Kracklin</i>							
A	10000071	F	10000076	K	10000081	P	10000086
B	10000072	G	10000077	L	10000082	Q	10000087
C	10000073	H	10000078	M	10000083	R	10000088
D	10000074	I	10000079	N	10000084	Inst 1	10000089
E	10000075	J	10000080	O	10000085	Inst 2	10000090

3. Click **Enter** on the keyboard to validate your entry.

4. Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	02 - Discrimination

5. Click or press **Enter** on the keyboard to validate your entry.

6. Click the **Create**  button to begin a new Grievance record.

7. Complete the following fields:

Field	Value
Start	April 25, <current year>  CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave 12/31/9999
Discrimination Action/ Work Assignments	<p>Discrimination Action</p> <ul style="list-style-type: none"> • Work Assignment <p>Discrimination Basis</p> <ul style="list-style-type: none"> • Race • Age <p> You must select the Work Assignment before you select the Basis (Race & Age).</p> <p>For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected.</p> <p> The record will not allow you to save unless you have checked an item in the appropriate box.</p>
Date of Alleged Event or Action	April 11, <current year> The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the time frames for the entire grievance process.

8. Click or press **Enter**  to validate your changes.

9. Click the **Save**  button to save the record creation.

PART B: CHANGE IT9834 - INFORMAL STEP TAKEN

STATUS

An EEO Investigator was assigned and spoke with Mr. Kracklin and collected statements into the allegations. An investigation was completed and submitted to appropriate level management on May 5th. Based on the conclusion of the investigation, EEO found cause to substantiate the allegations in his complaint. EEO met with Mr. Kracklin and Management to resolve the complaint. A mutual agreement was reached and the complaint was resolved. Management did not sign off on the investigation summary until 5/12/XXXX <current year>.

The IT9834 record must be updated to reflect Mr. Kracklin’s complaint was resolved through the EEO Informal Inquiry.

- 10. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Resolved, EEO Informal Inquiry
Date Informal Completed	May 12th, <current year>
Comments	Edit > Maintain Text <i><your name> May 15, <current year></i> <i>Per the EEO Informal Investigation, the North Carolina Department of Administration has agreed to reassign Mr. James C. Kracklin to another team effective June 1, <current year>.</i>
To (delimit date)	Change 12/31/9999 to 5/12/<current year>

 **NOTE:** A date must be recorded for both resolved and unresolved outcomes.

- 11. Click the **Copy (Enter)**  button.
- 12. Click the **Save**  button.
- 13. Click the **Enter**  button.
- 14. Click the **Save**  button.

EXERCISE 3.3: Create a Harassment (Sex) Grievance Record

SCENARIO

The Department of Cultural Resources, Equal Employment Opportunity (EEO) Office received a timely complaint filed on January 11th from Photographer Francine Amato (Female) against Exhibit Designer Randall Wright (Male) for inappropriate conduct and comments based on a sexual nature.

CAUTION: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

PART A: CREATE IT9834 - EMPLOYEE GRIEVANCE DATA

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder > Job Aids > Grievance Maintainer*.

Infotype 9834 must be created in the system to track the grievance process.

ALLEGATIONS

In Ms. Amato’s complaint, she stated that she was sexually assaulted on January 2nd when Randall Wright grabbed her hand and forced her to touch his genital area during a conversation they were having. Ms. Amato further alleged that Mr. Wright followed her to her office on the same day and attempted to put his hand down the front of her shirt.

You are currently on the SAP Easy Access screen.

1. Enter transaction code **PA30** in the Command field and click .
2. Enter the **personnel number** from the table below based on the student ID your instructor assigns you.

PERNR: <i>Francine Amato</i>							
A	80000631	F	80000636	K	80000641	P	80000646
B	80000632	G	80000637	L	80000642	Q	80000647
C	80000633	H	80000638	M	80000643	R	80000648
D	80000634	I	80000639	N	80000644	Inst 1	80000649
E	80000635	J	80000640	O	80000645	Inst 2	80000650

3. Click **Enter** on the keyboard to validate your entry.

4. Complete the following fields:

Field	Value
Infotype	9834 - Employee Grievance Data
Subtype	03 - Harassment

5. Click or press **Enter** on the keyboard to validate your entry.
6. Click the **Create**  button to begin a new Grievance record.
7. Complete the following fields:

Field	Value
Start	January 11, <current year>  CRITICAL: The Start Date is the date you create the first entry. Once this date is saved it cannot be changed.
End	Leave 12/31/9999
Action/Basis Boxes	Discrimination Basis <ul style="list-style-type: none"> • Sex <p>For each grievable issue chosen, there will be a corresponding check box to be completed. All check boxes will be visible, but your entry will be restricted to the applicable boxes for the grievable issue you selected.</p>  The record will not allow you to save unless you have checked an item in the appropriate box.
Date of Alleged Event or Action	January 2, <current year> <p>The Date of the Alleged Event or Action is the date of the event/action that prompted the grievance. This date is critical information as it begins the time frames for the entire grievance process.</p>

8. Click or press **Enter**  to validate your changes.
9. Click the **Save**  button to save the record creation.

PART B: CHANGE IT9834 - INFORMAL STEP TAKEN**STATUS**

An EEO Investigator was assigned and spoke with Ms. Amato and collected statements about the allegation on January 13th. An investigation was completed and submitted to appropriate level management on January 30th. EEO did not find cause to substantiate the allegations in her complaint. She was sent a letter of no-cause and given her appeals rights.

The IT9834 record must be updated to reflect Ms. Amato's informal discussion with her supervisor.

10. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Informal Step Taken	Unresolved, EEO Informal Inquiry
Date Informal Completed	January 30, <current year>

 **Remember:** A date must be recorded for both resolved and unresolved outcomes.

11. Click the **Enter**  button.
12. Click the **Save**  button.

PART C: CHANGE IT9834 - DATE FORMAL GRIEVANCE FILED**STATUS**

Ms. Amato was not satisfied with the results of the EEO Informal Inquiry Process and filed a Step 1 Grievance on February 2nd.

13. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Formal Grievance Filed?	Yes
Date Formal Grievance Filed	February 2, <current year>

 **REMEMBER:** It is imperative that this field be completed with a Yes or No following the Date Formal Grievance Filed entry.

14. Click the **Enter**  button.
15. Click the **Save**  button.

PART D: CHANGE IT9834 - DATE FORMAL GRIEVANCE FILED

A mediation was held with Ms. Amato (Grievant) and Robert Jones, Management Representative (Respondent) on February 20th. The Respondent agreed to allow Ms. Amato to be reassigned, giving her minimal contact with Mr. Wright. A Memorandum of Agreement was signed and approved by Agency Management prior to leaving the mediation.

- 16. On the next entry, click the **Change (F6)**  button to maintain the record.

Field	Value
Step 1 Result/Mediation	Resolution
Date Step 1 Completed	February 20, <current year>
Edit > Maintain Text	<your name> 2/23/<current year> <i>Per the Memorandum of Agreement, the Department of Public Safety, represented by respondent, Robert Jones, and the grievant, Francine Amato, reached a resolution allowing Ms. Amato to be reassigned to Unit 4.</i>

You need to delimit the infotype since the process has come to a completion.

- 17. Click the **Enter**  button.
- 18. Click the **Save**  button.
- 19. Go to the **To** field at the top of the record. Change the date from 12/31/9999 to **2/20/<current year>**.
- 20. Click the **Enter**  button.
- 21. Click the **Save**  button.
- 22. Click **Back** until you return to the SAP Easy Access screen.
- 23. Click the **PA321 Connect Pro Meeting tab** on your taskbar to return to the Connect Pro Meeting.
- 24. Click the **Green Check**  to let the instructor know you have completed the exercise.

REMEMBER: Be very careful to enter correct dates on the Employee Grievance Data infotype. Always verify before saving.

This exercise is complete.

OSHR Completion of Infotype

OSHR completes the remainder of The Employee Grievance Data infotype and will delimit when completed.

Appealed to OAH?

OAH - To be Completed by OSHR			
Appealed to OAH?	<input type="checkbox"/>	OAH Filing Date	<input type="text"/>
OAH Case Number	<input type="text"/>	OAH Case Status	<input type="text"/>
OAH Remand Back To Agency	<input type="text"/>	Remand Date	<input type="text"/>
OAH Final Decision	<input type="text"/>	Decision Date	<input type="text"/>

A grievant may appeal to OAH within 30 calendar days of receiving the FAD in cases where the grievable issue may be appealed. A grievant may also appeal to OAH after 90 calendar days from the formal grievance filing date if they do not receive a FAD, per policy.

The data to complete this section can be located on the petition received by OSHR from OAH.

OAH Final Decision

An Administrative Law Judge will conduct a hearing and render a Final Decision. The Final Decision will be one of the following:

- **Petitioner** FAD upheld/unchanged
- **Respondent** FAD reversed
- **Modified** FAD modified
- **Withdrawn** Petitioner chose to withdraw grievance. The grievance has ended.
- **Resolved Prior to Decision** Agreement reached before final decision. The grievance has ended.
- **Dismissed at OAH** Case was dismissed at OAH, e.g. untimely filing, lack of jurisdiction

The Decision Date is the date that the Final Decision was issued to the petitioner by the Office of Administrative Hearings.

Examples of Comments

- **Petitioner:** No Comment needed
- **Respondent Comment:**

S. Sally 9-16-13

OAH reversed the Disney Agency's FAD to uphold the dismissal issued on April 12, 2013. The grievant, Mickey Mouse, will be reinstated to his former position as Disney Character, effective October 1, 2013. Mickey Mouse will receive back pay and full benefits.

- **Modified Comment:**

S. Sally 9-16-13

OAH modified the Disney Agency’s FAD to uphold the 10-day disciplinary suspension without pay issued to the grievant, Mickey Mouse, on April 3, 2013 and reduced it to a 5-day disciplinary suspension with pay. The grievant will be reimbursed for 5 days of disciplinary suspension without pay.

- **Withdrawn:** No Comment needed

- **Resolved Prior to Decision Comment:**

S. Sally 9-16-13

In a meeting before the OAH decision was rendered, the Disney Agency agreed to allow the grievant, Mickey Mouse, to resign for personal reasons in lieu of dismissal effective September 1, 2013.

- **Dismissed at OAH Comment:**

S. Sally 9-16-13

OAH dismissed appeal filed by Mickey Mouse September 1, 2013 due to untimely filing.

Reporting

Grievance reports are located in BI. Follow this path to access the reports listing:

Personnel Administration > Grievances > Employee Grievance Data

Detailed Navigation

- ▶ Compensation
- ▶ Qualifications
- ▼ Grievances
 - B0034: Employee Grievance Data

DETAILED REPORTS

- **B0034 – Employee Grievance Data** - This report lists all Grievable Issues filed by active employees. It includes informal and formal steps taken. Jumps to 'B0022: Comments Report'.

SUMMARY REPORTS

- **B0057 – Grievance Overview** - Report shows the total number of grievances (based on Grievance Count) and corresponding percent calculations. The counts and percents are broken down by processing steps for each of the four Grievable Issue types (Policy Violation, Discrimination, Harassment, and Retaliation).
- **B0059 Grievance Discrimination Summary** - Report shows by Agency, the number of Discrimination grievances (based on Reason Count) and corresponding percent calculations. The counts and percents are broken down by each type of Discrimination Basis.

Training

Table of Content: BI_Reporting\Job Aids

Course Title\Description
Agency Metrics Report Descriptions in BI
Analyzer Query Descriptions in BI
B0089 General Turnover Rate BI Job Aid
B0090 New EE Turnover Rate BI Job Aid
B0098 Time to Process Separations BI Job Aid
Known Data Anomalies
QM Report Descriptions in BI
QM Reporting Subject Matter Experts
PA Report Descriptions in BI
PA Reporting Subject Matter Experts
PMIS Grievance Reporting Report Descriptions in BI

- **B0060 Grievance Harassment Summary** - Report shows by Agency, the number of Harassment grievances (based on Reason Count) and corresponding percent calculations. The counts and percents are broken down by each type of Discrimination Basis.
- **B0069 Grievance Retaliation Summary** - Report shows by Agency, the number of Retaliation grievances (based on Reason Count) and corresponding percent calculations. The counts and percents are broken down by each type of Discrimination Action.
- **B0071 Grievance Policy Violation Summary** - Report shows by Agency, the number of Policy Violation grievances (based on Grievance Count) and corresponding percent calculations. The counts and percents are broken down by each type of Policy Violation Action.

KNOWLEDGE CHECK

Question	Answer
1. How often are agencies required to submit employee grievance reports to OSHR.	
2. Once the ___ is saved, it cannot be changed.	
3. The Start date is the date you ___.	
4. The ___ begins the time frames for the entire grievance process.	
5. In the Informal Step Taken, a date must be recorded for both ___ and ___ outcomes.	
6. The Formal Grievance must be filed within ___ calendar days of the Date of the Alleged Event or Action.	
7. In the Step 1/Result/Mediation ___ means no agreement was reached.	
8. A Step 2 Grievance must be filed within ___ calendar days of the mediation.	
9. A grievant may appeal to OAH within ___ calendar days of receiving the FAD in cases where the grievable issue may be appealed.	
10. ___ delimits the record after a FAD has been issued.	

SUMMARY

In this lesson you learned to:

- Enter grievance data as events occur.

This will enable you to:

- Submit employee grievance data to OSHR as requested.

Course Review

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Grievance Record

Lesson 3: Course Review

DON'T FORGET...

The State of North Carolina Employee Grievance Policy is still being reviewed and updated. Prior to implementing policy, students need to verify the most current changes by accessing updated materials at the following sites:

- **OSHR Policy Guide website**
 - <http://www.oshr.nc.gov/Guide/Policies/section7.pdf>
- **OSC HR/Payroll Training HELP website**
 - <http://www.osc.nc.gov/training/osctd/help/>
 - Personnel Administration > Job Aids > Grievance Maintainer

Lesson 3 Objectives

Upon completion of this lesson, you should be able to:

- Define key terms and concepts
- Describe the OSC HR/Payroll system grievance processes
- View, create and maintain a grievance record
- Identify how to access the Grievance reports

HR/Payroll System Integration



Because OSC HR/Payroll is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how OSC HR/Payroll looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

Listen as your instructor explains how the Personnel Administration module integrates with the other the HR/Payroll system modules.

Next Steps

- Monitor the HR/Payroll System communication
 - BEST Shared Services web site (especially the Updates tab)
URL: <http://www.osc.nc.gov/BEST/index.html>
 - BEACON Training website: **What's New** link
URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site
URL: <http://www.osc.nc.gov/training/osctd/help>
- Practice what you've learned
URL: <http://mybeacon.nc.gov>
 - Client 899
 - Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your competency assessment and your evaluation of today's class in the Learning Management System (LMS).

When you have completed the class, you may:

- Hang up the phone
- Exit the virtual classroom

CONGRATULATIONS!

You've completed the course!

