



AFGE CASETRACK User Documentation for Local Level Users

www.afge-casetrack.org

system development by
www.microsearch.net

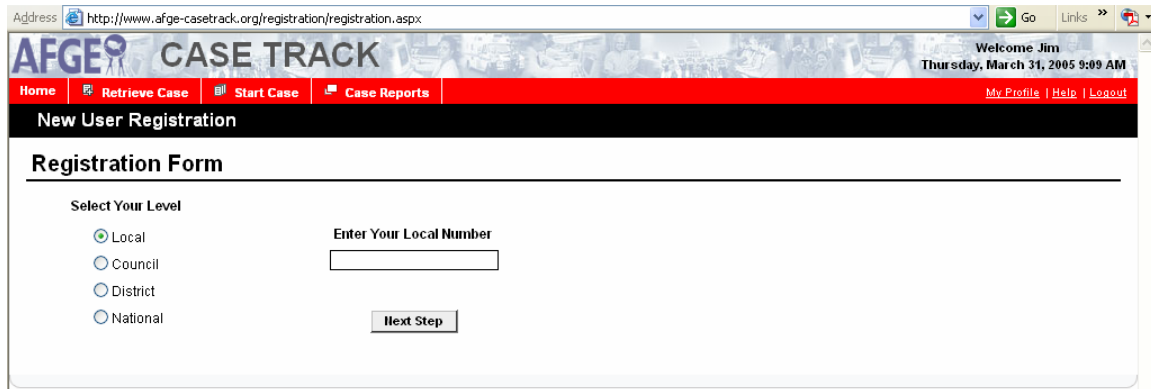


Local Level

Getting Started

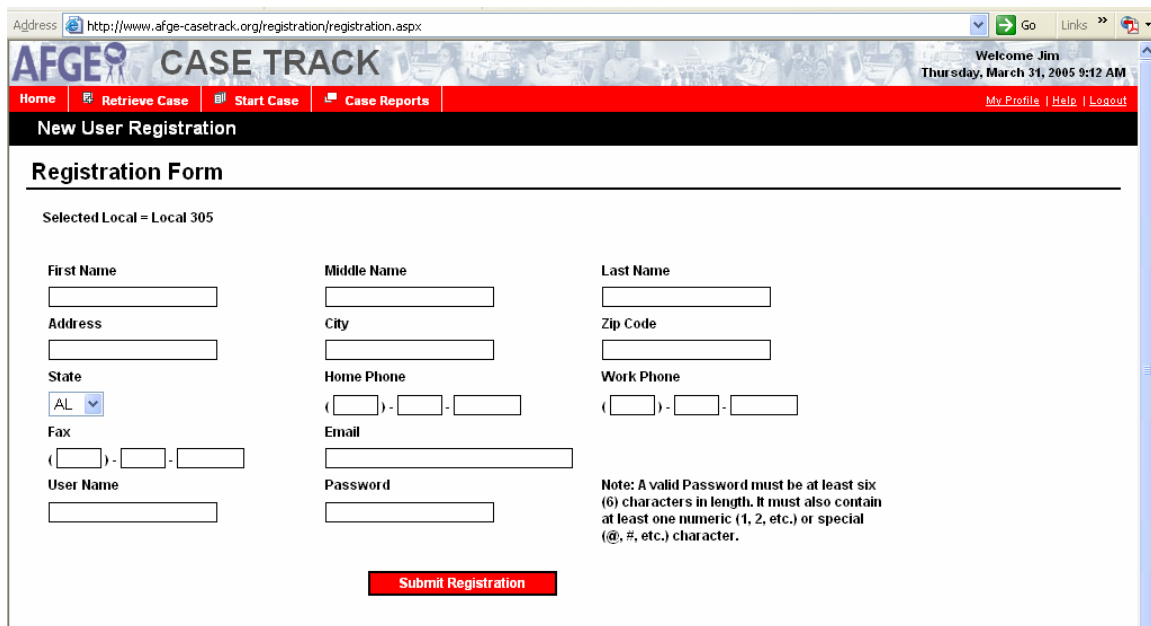
The AFGE CaseTrack system was designed to be simple and intuitive to use. There are three main actions users can take on the system: retrieve a case or cases, start a case, and generate reports. First, however, users need to register for access to the system with the local administrator.

Each local will have an assigned local administrator. The local administrator will approve and manage other users within that local. To register, click on the registration link on the www.afge-casetrack.org home page. This will take you to a registration form for new users.



The screenshot shows a web browser window with the address <http://www.afge-casetrack.org/registration/registration.aspx>. The page header includes the AFGE CASE TRACK logo and a navigation menu with links for Home, Retrieve Case, Start Case, and Case Reports. A user is logged in as Jim, with a welcome message and the date Thursday, March 31, 2005 9:09 AM. The main content area is titled "New User Registration" and contains a "Registration Form". Under the heading "Select Your Level", there are four radio button options: Local (selected), Council, District, and National. To the right of these options is a text input field labeled "Enter Your Local Number" and a "Next Step" button.

First, select the local for which you are registering. Your local administrator can only approve local access, so select the local option. It will then prompt you to enter the number of your local. You can enter this with or without the leading "0". The system will check to make sure it is a legitimate local number, and then take you to the registration page.



The screenshot shows the same web browser window, but the registration form is now more complete. The "Selected Local = Local 305" is displayed. The form fields are organized into three columns: First Name, Middle Name, and Last Name; Address, City, and Zip Code; State (a dropdown menu showing "AL"), Home Phone, and Work Phone; Fax, Email, and Password. A note at the bottom right states: "Note: A valid Password must be at least six (6) characters in length. It must also contain at least one numeric (1, 2, etc.) or special (@, #, etc.) character." A red "Submit Registration" button is located at the bottom center of the form.

Fill in all of the fields and click on the submit button. Make sure that you pick a username and password with at least 6 characters, one of which must be a numerical (1,2,3) or special character (#,\$,%). This improves the security of the system. Once the registration request has been submitted, the system will send an e-mail to notify the local administrator that there is a pending registration request. As soon as the local administrator approves your request, your username and password will be activated and you can begin to enter and retrieve cases.

The following document will discuss how to retrieve a case, start a case, and generate reports. To get to each main section, please use the navigation menu located at the top of the screen.



Retrieving a Case

To get started, click on the "Retrieve Case" button in the top navigation menu. There are 7 different ways to retrieve a case. Select which option you believe will best enable you to find the case you are looking for from the new screen. Once you have entered the necessary criteria under that option, you will be presented with a table listing of all entries that matched your search criteria.

Retrieve Case By:

- My Cases
- Agency
- Local
- Concerned Party
- Case Type
- Case Designation
- Issue

Continue

Different Options for Retrieving a Case

My Cases

The **My Cases** option will pull up a list of all of the cases that you have started or that have been assigned to you by your local administrator.

Agency

The **Agency and Local** option will allow you to choose from a list of all cases within your own agency and local. This option is not useful in narrowing the choices to the cases that are most likely to be relevant for you – it lists all local cases.

Concerned Party

The **Concerned Party** allows you to search for a case by grievant/employee name. You only need to type in a few letters of either name to retrieve all cases with those letters in the first or last name

Case Type

This allows you to retrieve a case on the basis of case type. Once you select this option, you are presented with the following list of case types:

- 1) Employee Grievance
- 2) Union-Management Grievance
- 3) Unfair Labor Practice
- 4) Merit Systems Protection Board
- 5) Equal Employment Opportunity
- 6) Notice of Change
- 7) Congressional Contact

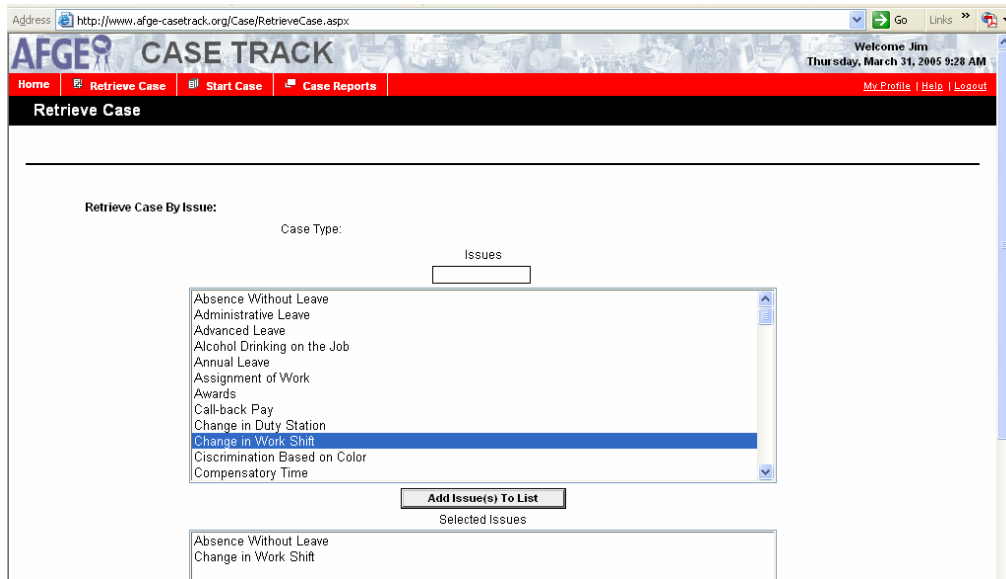
Select the type of case you wish to access and all cases of that type will be listed.

Case Designation

This option allows you to retrieve a case either by case designation or by case number. The case designations or numbers are assigned by the system based on the case type, the relevant agency, the local and the sequence number when the case was input into the system. For example EG-GSA-Local 0305-9-05 is an employee grievance for GSA started by local 0305 and is the ninth one in 2005.

Issue

This option allows you to retrieve a case according to case issue. To use this option, first select the case type and then select from the various case issues.



You can select as many issues as you like and the system will retrieve a list of cases that were associated with those issues when they were entered in the system.

Viewing Cases

Once you have selected how you wish to find the case, select the particular case you wish to view from the table of cases by clicking on the "Open Case" link in the appropriate row.

Concerned Party	Case Rep	Designation	Agency	Type	Step	Assignment	In System	
	Afge Jim	ULP-GSA-Local 0305-3-05	GSA	ULP	Filing	Local 0305	53 Days	Open Case
Tuna Charlie	Afge Jim	MSPB-GSA-Local 0305-5-05	GSA	MSPB	Hearing	Local 0305	53 Days	Open Case
	Afge Jim	ULP-GSA-Local 0305-6-05	GSA	ULP	Unfair Labor Practice Charge Information	Local 0305	53 Days	Open Case
	Afge Jim	ULP-GSA-Local 0305-7-05	GSA	ULP	Unfair Labor Practice Charge Information	Local 0305	53 Days	Open Case
	Afge Jim	UM-GSA-Local 0305-8-05	GSA	UM	Step One	Local 0305	53 Days	Open Case
Local Brian	Afge Jim	EG-GSA-Local 0305-9-05	GSA	EG	Arbitration	Local 0305	53 Days	Open Case

Starting a Case

To start a case, click on the "Start Case" button in the top navigation menu. You will have a list of seven different case types to choose from. They are:

- 1) Employee Grievance
- 2) Union-Management Grievance
- 3) Unfair Labor Practice
- 4) Merit Systems Protection Board
- 5) Equal Employment Opportunity
- 6) Notice of Change
- 7) Congressional Contact

Select A Case Type:

- Employee Grievance
- Union-Management Grievance
- Unfair Labor Practice
- Merit Systems Protection Board
- Equal Employment Opportunity
- Notice Of Change
- Congressional Contact

Continue

Select the type of case you wish to start, and click on the "Continue" button.

You will be asked to select an agency with which you are filing your case. Once you have selected an agency, click on the "Continue" button. The system will automatically associate your local with an agency. If you find that your local is associated with the wrong agency, please send an e-mail to casetrack@afge.org with the necessary

Case Type = Employee Grievance

Select An Agency:

- GSA

Continue

correction.

Next you must fill out basic information regarding the grievant in the case. You will need to name and contact information.

Grievant Information	
First Name <input type="text"/>	Last Name <input type="text"/>
Employee Job Title <input type="text"/>	
Street Address <input type="text"/>	City <input type="text"/>
State <input type="text" value="Select A State"/>	Zip <input type="text"/>
Work Phone (<input type="text"/>) - <input type="text"/> - <input type="text"/>	Home Phone (<input type="text"/>) - <input type="text"/> - <input type="text"/>
Fax (<input type="text"/>) - <input type="text"/> - <input type="text"/>	
Home Email <input type="text"/>	Work Email <input type="text"/>
Is grievant a a member <input type="radio"/> No <input checked="" type="radio"/> Yes	MultipleParties <input checked="" type="radio"/> No <input type="radio"/> Yes
<input type="button" value="Start Case"/>	

Once you have filled out the necessary information, please click on the "Start Case" button to begin your case. You will be taken to the "Grievance Information" screen.

Grievance Information

The "Grievance Information" tab is the main information screen for each grievance. This section is divided into three areas: Case Information, Grievant Information, and Detailed Information.

Case Information

The case information panel contains information such as submission date, union representative and contact information, management official with whom the case was filled, and the union with which the case was filled.

Grievant Information

The grievant information panel contains contact information for the grievant.

Detailed Information

The detailed information panel allows the person filing the grievance to enter extensive details regarding the case. The person filing the grievance can enter information such as:

- 1) Incident Date
- 2) Description of Grievance
- 3) Contract Article, Rule, Regulation, or Policy Violated
- 4) Applicable Bargaining Agreement
- 5) Remedy Requested
- 6) Support Evidence (such as witness statements)
- 7) Primary and Secondary Issues

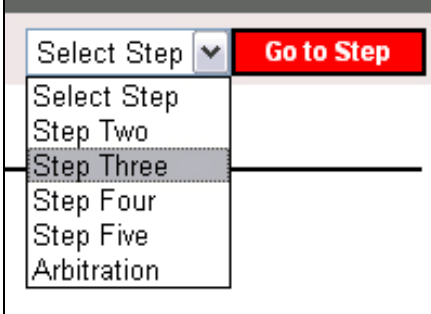
Updating a Case

To update a case, please make any changes you wish to make by typing in the text box for each field. Once you finished, click on the "Update Case" button at the top of the screen, and your changes will be saved.

grievance information		step three	step four	step five
Update Case		Attachments	Check Spelling	
Case Information		Click here to save changes after you've made them.		
Case Designation: EG-GSA-Local 0305-9-05	Case Assigned To: Local 0305	Make changes to any field by typing in it.		
Union Representative Afge Jim	Council Council 236			
Submission Date 2/2/2005	Duty Station Station 1598			
Union Rep Home Phone (554) - 558 - 8235	Union Rep Email JimUnionAfge@gsa.com			
Union Rep Work Phone (854) - 525 - 5852	Management Official Phone (888) - 524 - 6526			

Forwarding a Case

To forward a case, make sure you have entered all necessary information such as the incident date and submission date, and select a step to forward to in the drop down box in the top right hand corner entitled, "Select Step." Click on the "Go to Step" button.



The image shows a screenshot of a web interface. At the top right, there is a dropdown menu labeled "Select Step" with a downward arrow. Below the dropdown, a list of options is displayed: "Select Step", "Step Two", "Step Three", "Step Four", "Step Five", and "Arbitration". The "Step Three" option is highlighted with a grey background. To the right of the dropdown menu is a red button with white text that says "Go to Step".

Attachments

Each case can have corresponding documents of any electronic format attached to support the case. To attach a document, click on the "Attachments" button at the top of the page.

A new screen will pop up. On this screen you can attach a file by clicking on the "Browse" button. Navigate to the location of the file you wish to attach on your computer, and select that file. Once you have selected the file, you may add a note in the comments text box directly above the "Browse" button. Once you are finished, click on the "Add Note" button, to save the attachment to the case.

grievance information **step one**

Update Case **Attachments** **Check Spelling**

Click on this button to bring up the Attachments dialog box

Add New Note
Person Entering Note: Jim Afge
Comments:
Enter comments here

Add Attachment:
Browse...
(accepted file types: pdf, ppt, xls, jpg, tif, doc, txt)

Click here to browse for the file you wish to attach

Add Note
Click here to add note and save the file to the case

Generating Reports

To generate a report, first click on the "Case Reports" button in the top navigation bar. To create a case summary report, click on the corresponding link. Select a case type from the subsequent list. You will see a list of various filters that can be applied to the report. Select the options most appropriate for your criteria and click on the "Generate Report" button.

Select Case Type: <input checked="" type="radio"/> Employee Grievance <input type="radio"/> Union-Management Grievance <input type="radio"/> Unfair Labor Practice <input type="radio"/> Merit Systems Protection Board <input type="radio"/> Equal Employment Opportunity <input type="radio"/> Notice Of Change <input type="radio"/> Congressional Contact	Filter Report By Local? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Agency? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Primary Issue? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Secondary Issue? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Case Start Date? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Case Final Disposition Date? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Arbitrator? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Case Disposition? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Days In System? <input checked="" type="radio"/> No <input type="radio"/> Yes Filter Report By Case Current Step? <input checked="" type="radio"/> No <input type="radio"/> Yes
---	--

Continue 

Select a Case Type for your Report, then select how you want to filter it

Click here to generate report 

Once the report is generated, you will see a table with each case meeting your criteria. At the bottom of the page, you will see information regarding total cases listed, issues involved, dispositions, and case assignments. The reporting table contains a lot of information, and is best viewed on a computer screen with a resolution setting of at least 1028 x 768. If you have a lower resolution monitor, you will have to scroll to the right to see the full report. Alternatively, you can shrink the size of the report by excluding columns (see below).

Summary Report Options

Excluding Columns

To filter or shrink the case table, you can choose to exclude particular columns. To do so, remove checkmarks from the columns you do not wish to see in the top box, and click on the "Display Columns" button.

<input checked="" type="checkbox"/> Assignment <input checked="" type="checkbox"/> Primary Issue <input checked="" type="checkbox"/> Step	<input checked="" type="checkbox"/> Agency <input checked="" type="checkbox"/> Secondary Issues	Display Columns
---	--	------------------------

Select which columns you want to exclude from the display

Click here to make the changes

Ordering

You can order the table of cases by any column simply by click on the column title. To reverse the order, click on the column title again.

<u>Union Rep</u>	<u>Assignment</u>	<u>Agency</u>	<u>Start Date</u>	<u>Close Date</u>	<u>Primary Issue</u>
Click on the column titles to change the order of the list					

Printing

To generate a printer friendly version, click on the "Print Version" link at the top of the page.

Return To Criteria Selection Click here for print version — Print Version

Show Users

reset

User Name	Email	Current Assignment			
Afge Jim	test@test.com	Local(s): 0305	Profile	ReAssign	Archive

Current Assignment: Local 0305
Number Of Cases: 36

Concerned Party	Case Designation	Case Agency	Case Type	Case Assigned To
	NOC-GSA-Local 0305-40-05	GSA	NOC	Select Replacement
	ULP-GSA-Local 0305-15-05	GSA	ULP	Select Replacement
	ULP-GSA-Local 0305-18-05	GSA	ULP	Select Replacement
	ULP-GSA-Local 0305-21-05	GSA	ULP	Select Replacement
	ULP-GSA-Local 0305-24-05	GSA	ULP	Select Replacement
	ULP-GSA-Local 0305-25-05	GSA	ULP	Select Replacement