Welcome to AFGE

Case Track Training Manual

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Introduction

AFGE CaseTrack is an entirely web-based application built on the latest internet technology. With this Grievance Tracking System there is no need to install multiple copies on different computers or synchronize data between machines. All data is instantly updated on the server allowing users to get up-to-the-minute reports and case information online at any time. Having all your grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution. CaseTrack has been designed to be extremely simple and intuitive to use, ensuring that you can get up and running in no time. You will find it easy to find grievance cases, start new ones, and generate reports on your cases.

Local User/Local Administrator

You have selected the "Local User/Local Administrator" Registration Training Sequence. The following presentation will teach you how to register at the Local User or Local Administrator Levels.

As is the case throughout this presentation, click the mouse to view the next page.

Local Presidents…

No one in a Local can become a user until the Local President has registered as a Local Administrator. To do so, Local Presidents should email name, address, preferred email address, and desired username and password to casetrack@afge.org.
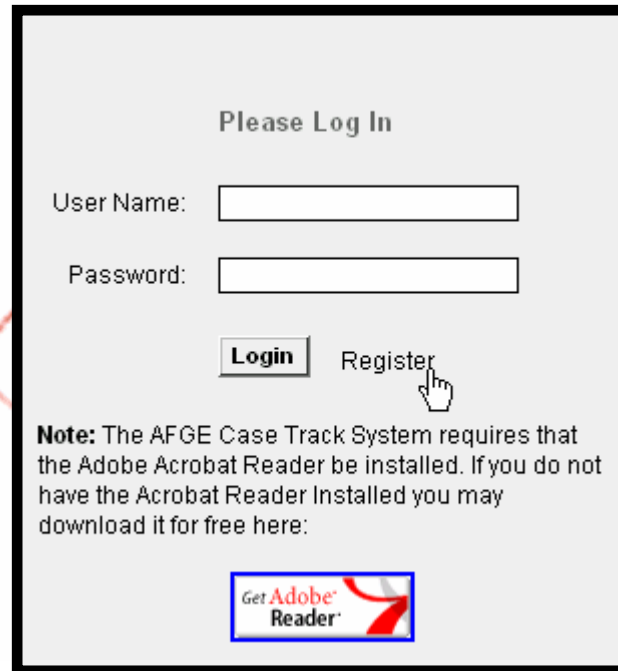
Pick a username and password. Your password must have at least six characters and at least one special character ($,#,&,etc). This improves the security of the system. Also, please use personal rather than government email.

Once you have been approved as a Local Administrator, you can approve other users in your Local.

See Approving Users Training Sequence for more details.

Local Users…

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.

Local Users…

First, select the local for which you are registering. Your local administrator can only approve local access, so select the local option. The system will check to make sure it is a legitimate local number, and then take you to the registration page.

New User Registration

Registration Form

Select Your Level

- ● Local
- ○ Council
- ○ District
- ○ National

Enter Your Local Number

[   ]

[Next Step]

Local Users…

If you are a Council Official and wish to register at the Council Level, select Council.

New User Registration

Registration Form

Select Your Level

- ⦿ Local
- ◯ Council
- ◯ District
- ◯ National

Enter Your Local Number

[   ]

[Next Step]

Registration Form

Fill in all of the fields and click on the submit button. Make sure that you pick a username and password. Your password must have at least 6 characters, one of which must be a numerical (1,2,3) or special character (#,$,%). This improves the security of the system.

New User Registration

Registration Form

Selected Local = Local 3000

First Name

Middle Name

Last Name

Address

City

Zip Code

State

AL

Home Phone

( ) - -

Work Phone

( ) - -

Fax

( ) - -

Email

User Name

Password

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.

Submit Registration

Pending Approval

Once your registration request has been submitted, the system will send an email to notify the Local Administrator that there is a pending registration request.

If the Local Administrator approves your request you will receive an email confirming your username and password and that you are now active in the system.

Until your local president has sent an email to casetrack@afge.org to become a Local Administrator, no one in your local may be activated.

My Profile

You can change your username, password, or address information at any time by clicking My Profile.

Congratulations, you completed the Registration Training Program!

Welcome to AFGE

Case Track Training!

Approving Users Training Sequence

Introduction

AFGE CaseTrack is an entirely web-based application built on the latest internet technology. With this Grievance Tracking System there is no need to install multiple copies on different computers or synchronize data between machines. All data is instantly updated on the server allowing users to get up-to-the-minute reports and case information online at any time. Having all your grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution. CaseTrack has been designed to be extremely simple and intuitive to use, ensuring that you can get up and running in no time. You will find it easy to find grievance cases, start new ones, and generate reports on your cases.

Local Administrators

You have selected the "Approving Users" Training Sequence. The following presentation will teach you how to approve users as a Local Administrator.

As is the case throughout this presentation, click the mouse to view the next page.

Local Administrators…

No one in a Local can become a user until the Local President has registered as a Local Administrator. To do so, Local Presidents should email name, address, preferred email address, and desired username and password to casetrack@afge.org.

Pick a username and password. Your password should have at least six characters and at least one special character (#). This improves the security of the system. Also, please use personal rather than government email.

Once you have been approved as a Local Administrator, you can approve other users in your Local.

If Local Presidents wish, they can designate one or more additional Local Administrators to help. The Local President should send a non-government email with the necessary information to casetrack@afge.org.

Registration Administration

From the "Home" page, click "Administration."
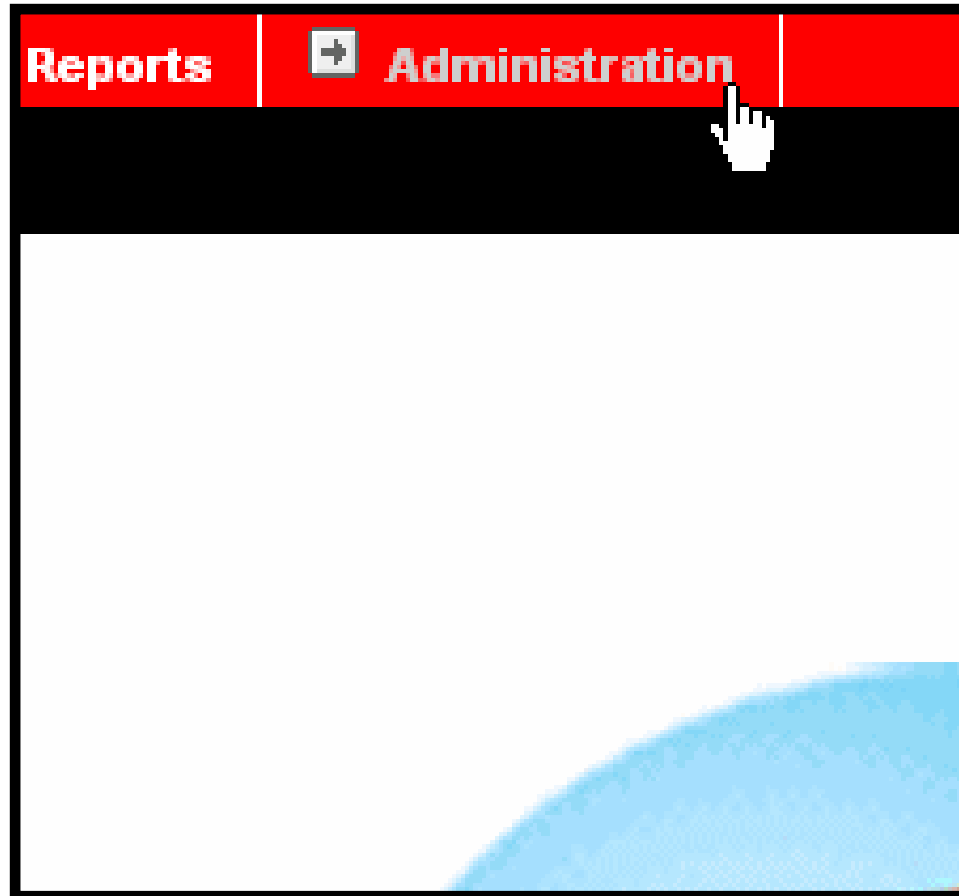
Registration Administration

Click Registration Administration.

Administration

Please select an area to administer

Registration Administration

User Administration

Local Administrators

If you have any registration requests they will appear in a grid with the User's Information.

Click "Accept Registration" to activate the user or "Deny Registration" to refuse Registration.

Registration Administration

Registration Requests

Registration Request For: Local 3000			
FirstName: Joe	MiddleName:	LastName: Local	
Address:	City:	State: AL	Zip:
HomePhone:	WorkPhone:	Fax:	
Email:			
	Accept Registration	**Deny Registration**	

Welcome to AFGE

Case Track Training!

Start Case Training Sequence

Introduction

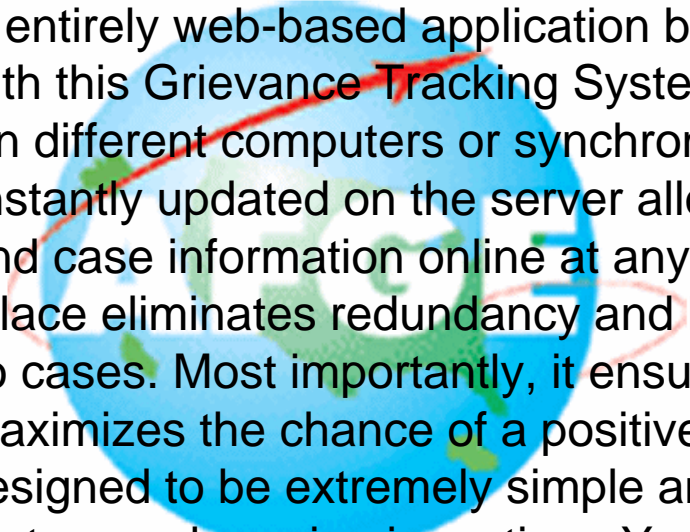AFGE CaseTrack is an entirely web-based application built on the latest internet technology. With this Grievance Tracking System there is no need to install multiple copies on different computers or synchronize data between machines. All data is instantly updated on the server allowing users to get up-to-the-minute reports and case information online at any time. Having all your grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution. CaseTrack has been designed to be extremely simple and intuitive to use, ensuring that you can get up and running in no time. You will find it easy to find grievance cases, start new ones, and generate reports on your cases.

Local User/Local Administrator

You have selected the "Local User/Local Administrator" Start Case Training Sequence. The following presentation will teach you how to start a case and advance it to subsequent steps at the Local User or Local Administrator Levels.

Throughout this presentation, click the mouse to view the next page.

Getting Started

First, click "Start Case"
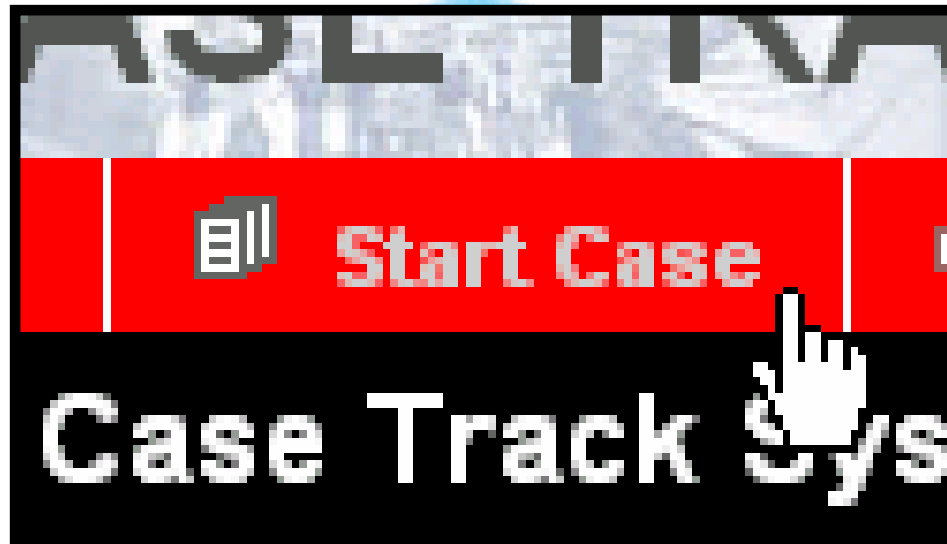
What type of Case would you like to start?

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

Select a Case Type

Select the case type by clicking the button next to the type and then clicking continue. This presentation uses "Employee Grievance" as an example.

Start A Case

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 an Agency

You may 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 correction.
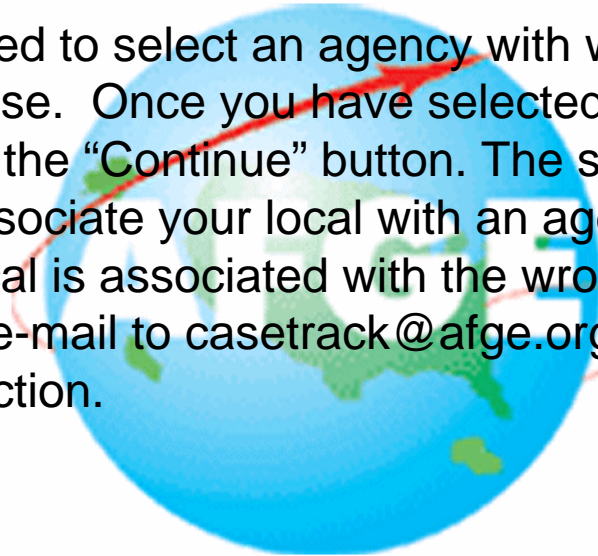
Select an Agency

Select an agency by clicking the button next to the agency and then clicking continue.

Grievant Information

You are now ready to enter the Grievant information...
Do so by filling the fields with the information requested.

Grievant Information

First Name

Last Name

Employee Job Title

Street Address

City

State

Select A State

Zip

Work Phone

( ) - -

Home Phone

( ) - -

Fax

( ) - -

Home Email

Work Email

Is grievant a a member

○ No   ● Yes

MultipleParties

● No   ○ Yes

Click start case to proceed to the next page.

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

Case Designation:
EG-ANG-Local 3004-6-05

Case Assigned To:
Local 3004

Union Representative

fitzgerald jon

Council

No Councils

Submission Date

Duty Station

Union Rep Home Phone

( ) - -

Union Rep Email

Union Rep Work Phone

( ) - -

Management Official Phone

( ) - -

Management Official with whom filed

Grievant's Supervisor

Management Official Email

Does Remedy involve backpay?

◉ No ○ Yes

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**.

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**.

Detailed Information

IncidentDate _____

Description of Grievance

Contract Article, Rule Regulation Policy or Law Violated

Applicable Bargaining Agreement

Case Information

The case information panel contains information such as the date the case was submitted, the union representative handling the case, and the management official with whom the case was filed.

Case Information

Case Designation:
EG-ANG-Local 3004-5-05

Case Assigned To:
Local 3004

Union Representative
fitzgerald jon

Council
No Councils

Submission Date

Duty Station

Union Rep Home Phone
( ) - -

Union Rep Email
user@local.com

Union Rep Work Phone
( ) - -

Management Official Phone
( ) - -

Management Official with whom filed

Grievant's Supervisor

Management Official Email

Does Remedy involve backpay?
⊙ No ○ Yes

Case Information

Additionally, a "Council" drop down menu has been added for Locals associated with Councils. This option determines whether or not the Council has access to a particular Local case.
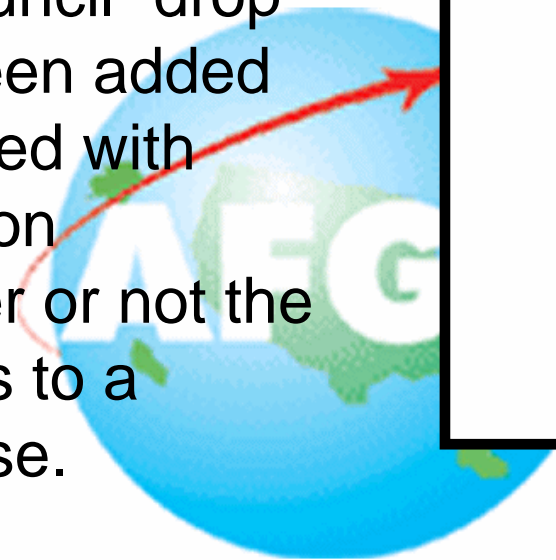
Case Assigned To:
Local 3004

Council

No Councils

Grievant Information

The grievant information panel contains contact information for the grievant.

Grievant Information

First Name	Last Name
Test	Case

Employee Job Title

Street Address | **City**

State | **Zip**
Select A State

Work Phone | **Home Phone**
( ) - - | ( ) - -

Fax
( ) - -

Home Email | **Work Email**

Is grievant a a member
○ No ⦿ Yes

MultipleParties
⦿ No ○ Yes

Grievant 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) Supporting Evidence (such as witness statements)
7) Primary and Secondary Issues

Detailed Information

IncidentDate
Description of Grievance

Contract Article, Rule Regulation Policy or Law Violated

Applicable Bargaining Agreement

Remedy Requested

Supporting evidence such as witness statements – please attach any relevant document

Primary Issue Please Select An Issue
All Secondary Issues

Absence Without Leave
Administrative Leave
Advanced Leave
Alcohol Drinking on the Job
Annual Leave

Add Secondary Issue

Case Secondary Issues

Remove Secondary Issue

Update Case

Updating a Case

To update a case, please make any changes you wish to make by typing in the text box for each field. Then, 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**

Click here to save changes after you've made them.

Case Information

Case Designation:
EG-GSA-Local 0305-9-05

Union Representative

Afge Jim

Submission Date

2/2/2005

Union Rep Home Phone

(554) - 558 - 8235

Union Rep Work Phone

(854) - 525 - 5852

Case Assigned To:
Local 0305

Make changes to any field by typing in it.

Council

Council 236

Duty Station

Station 1598

Union Rep Email

JimUnionAfge@gsa.com

Management Official Phone

(888) - 524 - 6526

Forwarding a Case

To advance 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.

Select Step ▾   **Go to Step**

Select Step
Step Two
Step Three
Step Four
Step Five
Arbitration
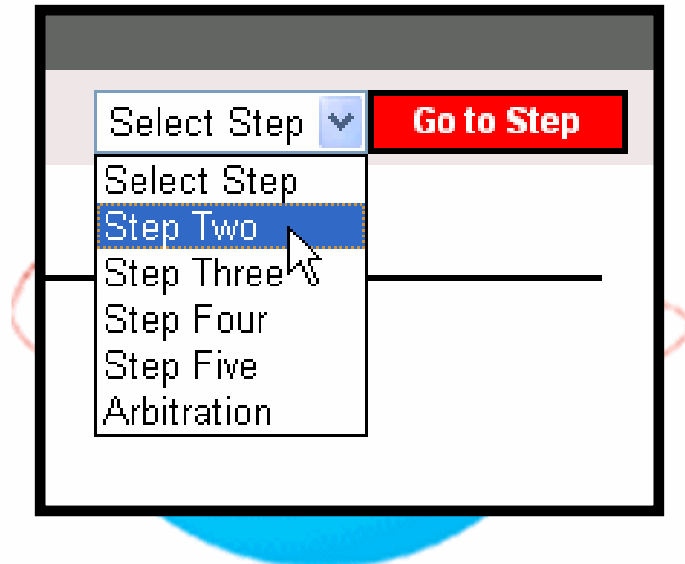
You can start at any step or skip steps. For example, you may start at Step Two rather than One if you are passing a step. You can go from Step Three to Arbitration if that is how your Local Grievance procedure works.

Disposition Options

For all steps there are various disposition options. You may only forward a case to the next step if you select an outcome that allows the case to move forward.

For example, an employee grievance at step one is automatically pending. The user can then select Granted, Denied, Settled or Withdrawn. If Granted, Settled or Withdrawn is chosen, then the case can not logically move forward. If the case is Denied, then the step option appears in the upper right hand corner that allows the user to forward the case to the next step.

Disposition

Denied

Pending
Granted
Denied
Settled
Withdrawn

base Solutions
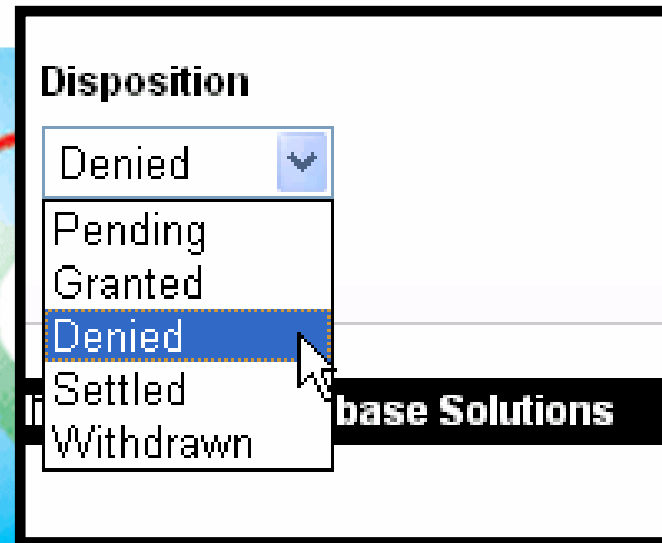
Attachments

Each case can have corresponding documents of any electronic format attached to support the case.
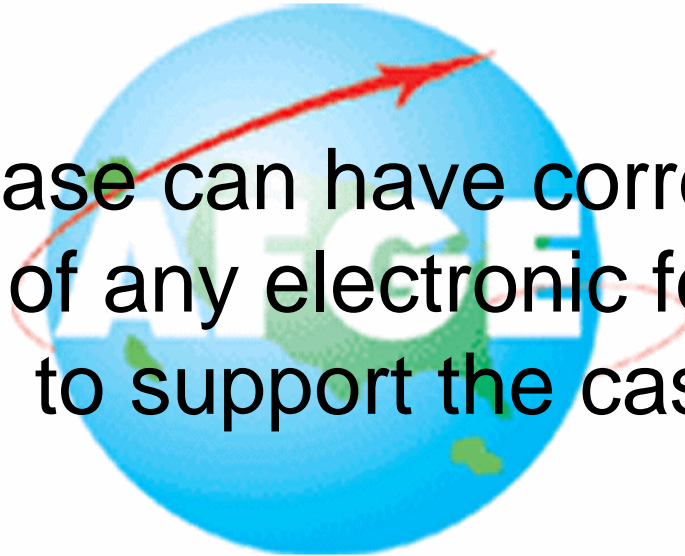
Attachments

To attach a document, click on the "Attachments" button at the top of the page.
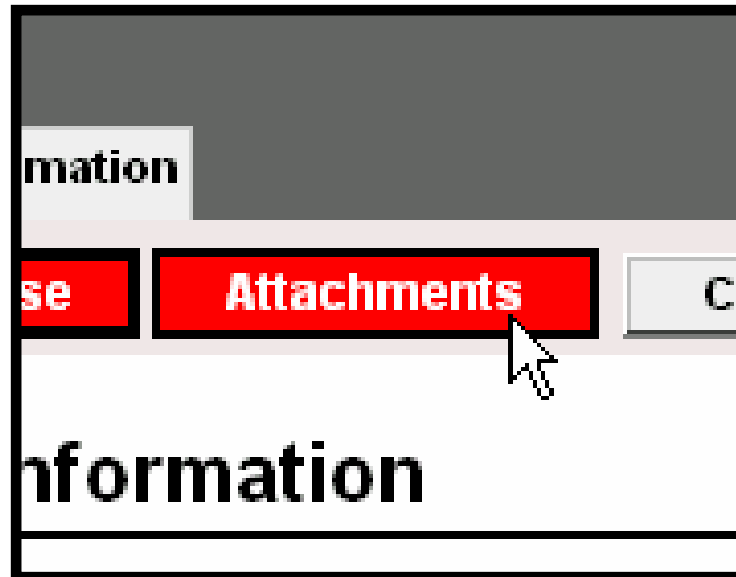
Attachments

A new screen will pop up. On this screen you can attach a file by clicking on the "Browse" button.

Add Attachment:

[_____] [Browse...]

(accepted file types: pdf, ppt, xls, jpg, tif, doc, txt)

Attachments

Navigate to the location of the file you wish to attach on your computer, and select that file.
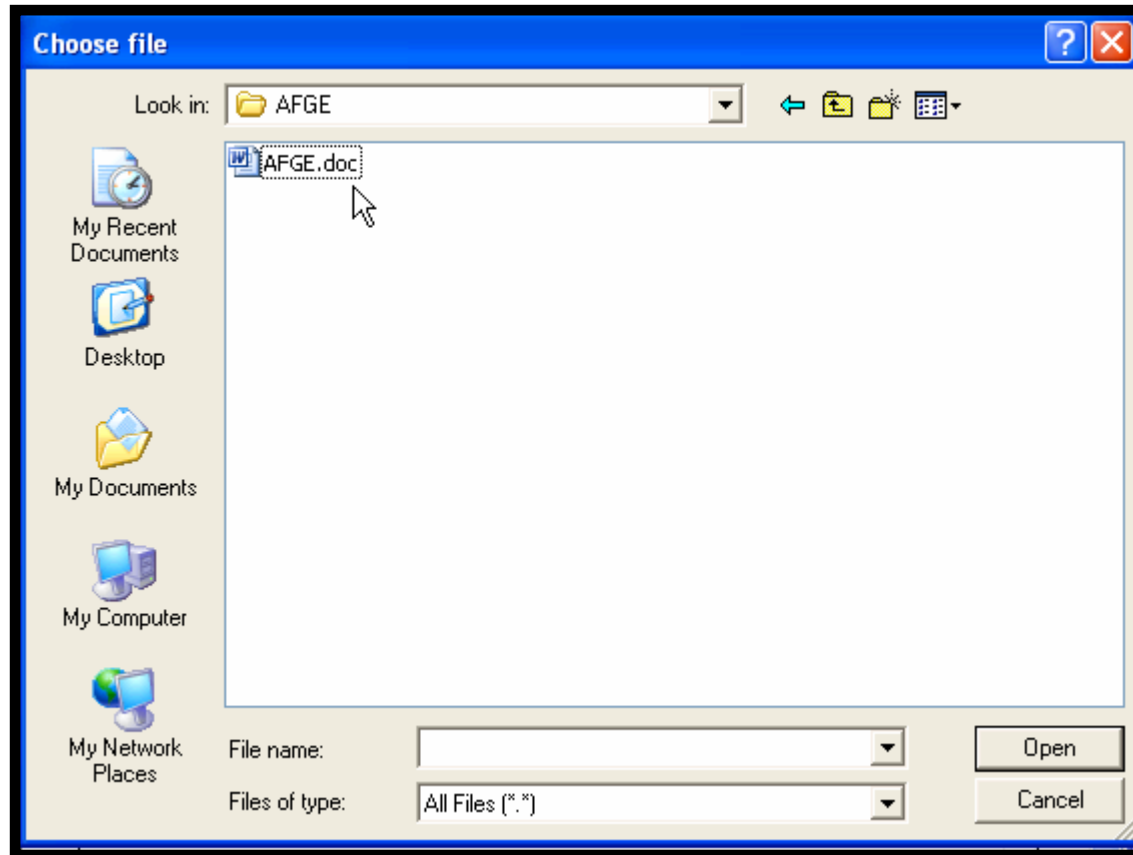
Attachments

Once you have selected the file, you may add a note in the comments text box directly above the "Browse" button.

Attachments

Once you are finished, click on the "Add Note" button, to save the attachment to the case.

Congratulations, you completed the Case Training Program!

Introduction

AFGE CaseTrack is an entirely web-based application built on the latest internet technology. With this Grievance Tracking System there is no need to install multiple copies on different computers or synchronize data between machines. All data is instantly updated on the server allowing users to get up-to-the-minute reports and case information online at any time. Having all your grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution. CaseTrack has been designed to be extrem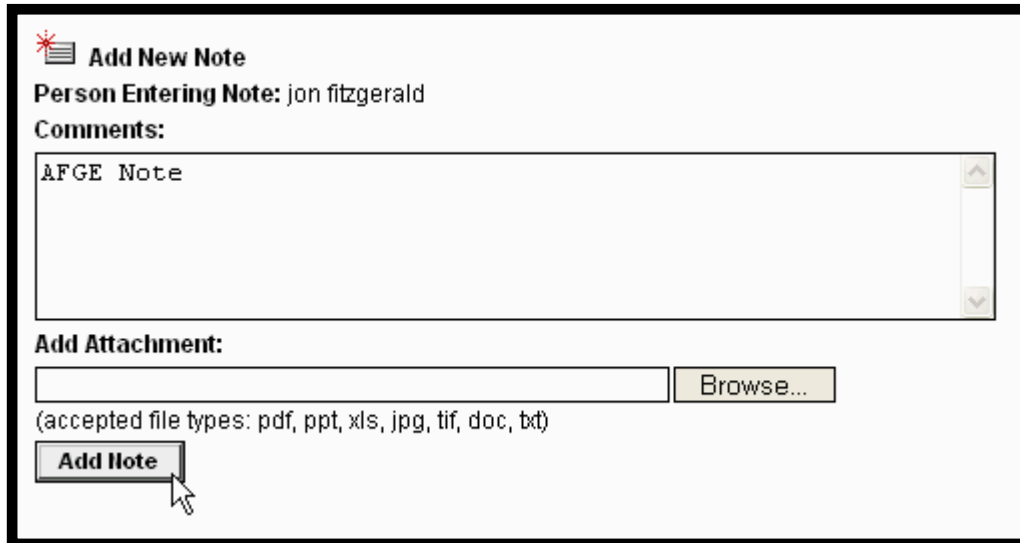ely simple and intuitive to use, ensuring that you can get up and running in no time. You will find it easy to find grievance cases, start new ones, and generate reports on your cases.

Local User/Local Administrator

You have selected the "Retrieve Case Training Sequence." The following presentation will teach you how to retrieve a case at the Local User or Local Administrator Levels.

As is the case throughout this presentation, click the mouse to view the next page.

Retrieve Case

From the "Home" Page click "Retrieve Case."
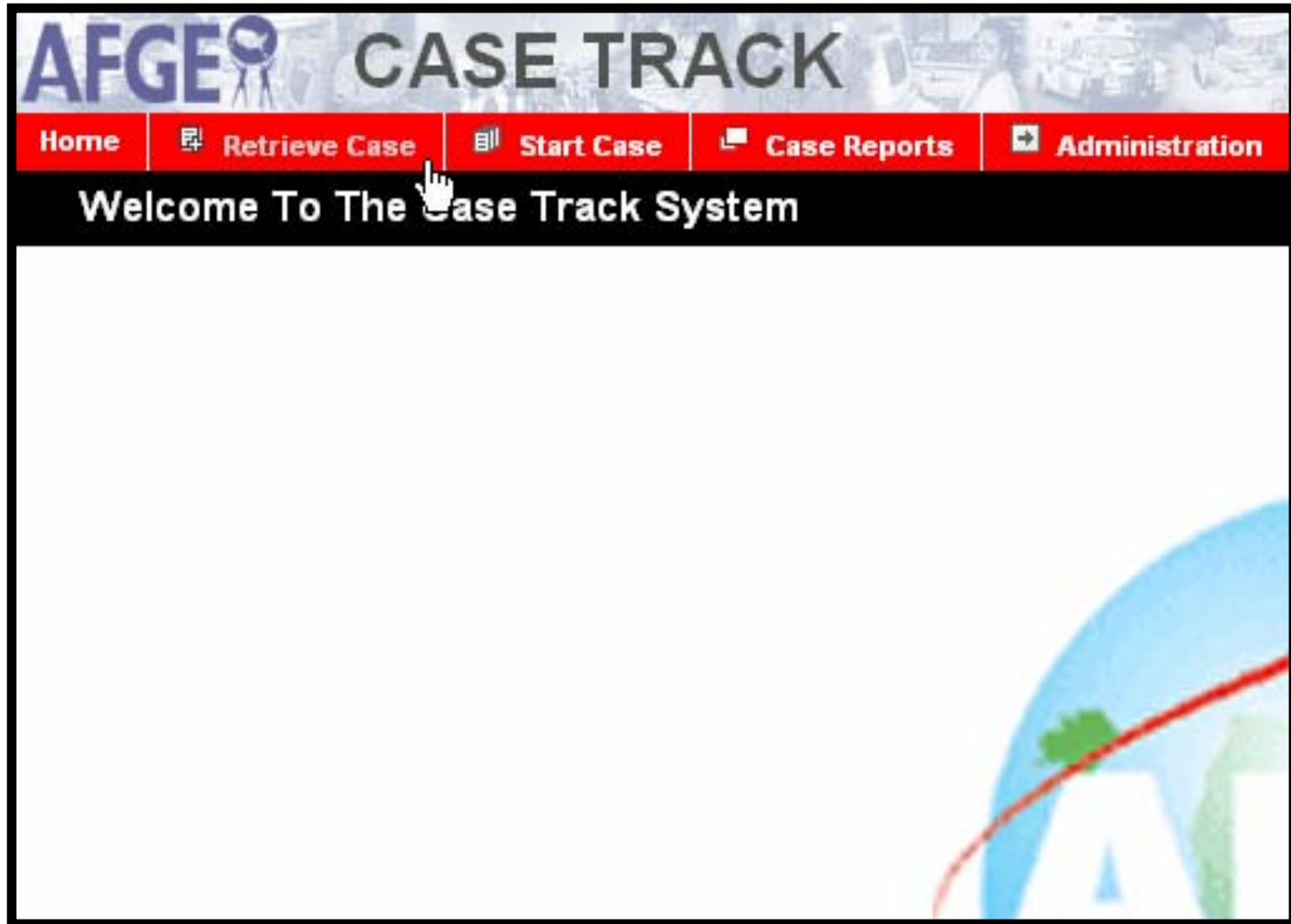
Retrieve Case By…

The next page gives you the option of retrieving a case by:

- My Cases – Cases belonging to the logged-in user.

- Agency – Cases belonging a particular agency.

- Local – Cases belonging to a particular local.

- Concerned Party – The concerned party as listed in the Case Report.

- Case Type – The type of case.

- Case Designation – The designation of the case.

- Issue - The Issue as listed in the Case Report

Retrieve Case By…

Select an option by clicking the corresponding button and then clicking continue.

Retrieve Case

Retrieve Case By:

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

Continue

Retrieve Case

The next screen is determined by the option chosen in the "Retrieve Case By" Screen.

If the user chooses "My Cases," a list of cases started by that user will appear.

Retrieve Case

Concerned Party	Case Rep	Designation	Agency	Type	Step	Assignment	In System	
Case Test	fitzgerald jon	EG-NG-Local 3000-1-05	NG	EG	Grievance Information	Local 3000	0 Days	Open Case

Retrieve Case

If the user chooses to retrieve a case by either "Agency" or "Local," they will see a list of the Agencies and Locals that they have administrative access to.

Retrieve Case

Retrieve Case By Local(s):

☐ Local 3000

Continue

Retrieve Case

If the user chooses to retrieve a case by "Concerned Party," they will need to enter the first and last name of the concerned party as written in the Case Report.

Retrieve Case

Retrieve Case By Concerned Party's Name:

First Name
```
Test
```

Last Name
```
Case
```

Continue

Retrieve Case

If the user chooses to retrieve a case by "Case type or "Issue," they must fill in the fields that appear on the subsequent pages.

Retrieve Case

Retrieve Case By Case Type:

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

Continue

More than one type may be selected and the results are displayed accordingly.

Retrieve Case

Retrieve Case

Retrieve Case By Issue:

Case Type:

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

Continue

When retrieving a case by issue, a Case Type must be selected first. Once a case type is selected a list of issues relating to that type will automatically appear.

Retrieve Case

Retrieve Case By Issue:

Case Type:

Issues

Emergency Closure of Building
Employee Rights
Excessive Absence
Gambling on the Job
General Working Conditions
Hazardous Duty/Environmental Differential Pay
Holiday Pay
Holidays
Incorrect Salary Rate
Insubordination
Jury Duty
Leave for Adoption

Add Issue(s) To List

Selected Issues

Select an issue by clicking it and then clicking "Add Issue(s) To List."
The Selected Issues appear in the second box. They may be removed
by clicking "Remove Issue(s) From List." When complete, click
continue.
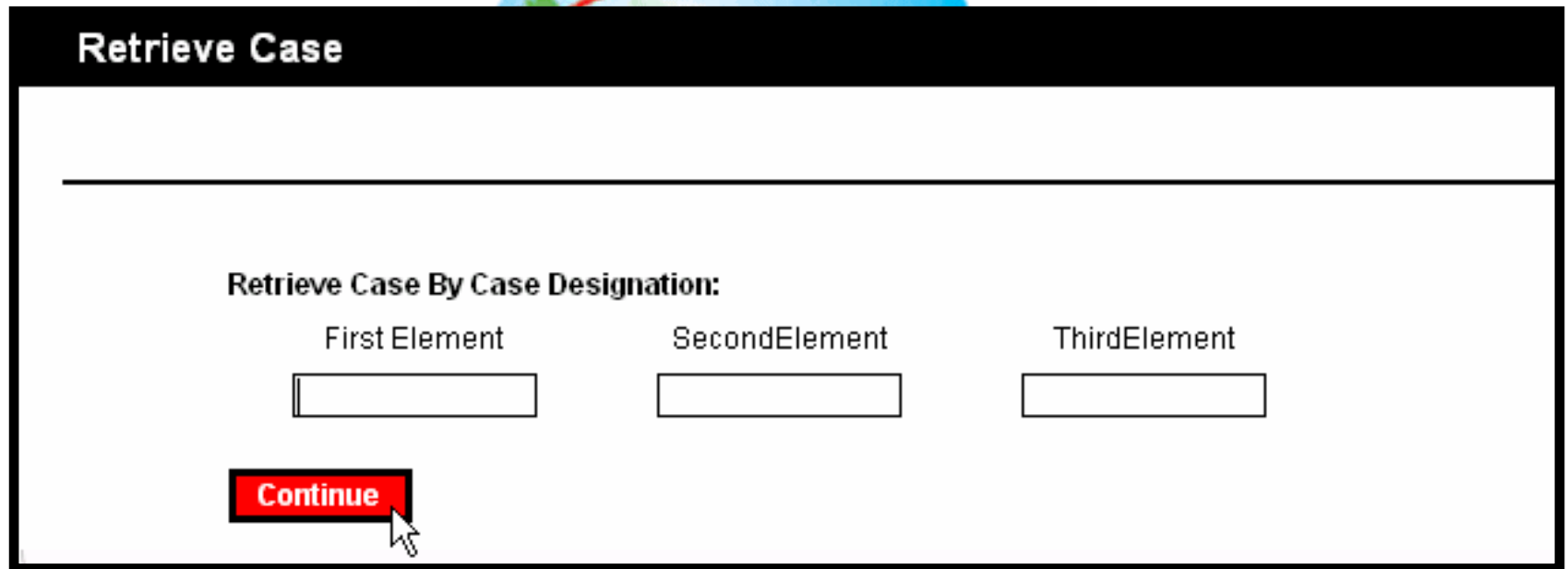
Remove Issue(s) From List

Continue

Retrieve Case

Finally, if the user chooses to retrieve a case by Case Designation, the first, second, and third Elements must be entered. The first element refers to the case type, the second to the relevant agency, and the third to the local and sequence number when the case was input into the system.

An example of a Case Designation is EG-GSA-Local 0305-9-05, where EG stands for Employee Grievance, GSA is the agency, the Local is identified and 9-05 means it was the ninth case entered in the year 2005.

Retrieve Case

Retrieve Case By Case Designation:

First Element   SecondElement   ThirdElement

Continue

Retrieve Case

The end result of each "Retrieve Case By" Selection will be a grid listing all cases matching the search criteria. Cases may be opened by clicking the "Open Case" Link.

Concerned Party	Case Rep	Designation	Agency	Type	Step	Assignment	In System	
Case Test	fitzgerald jon	EG-NG-Local 3000-1-05	NG	EG	Grievance Information	Local 3000	0 Days	Open Case

ent	In System	
0	0 Days	Open Case

Congratulations, you completed the Retrieve Case Training Program!

Welcome

to AFGE Training!

Generating Reports Training Sequence

Introduction

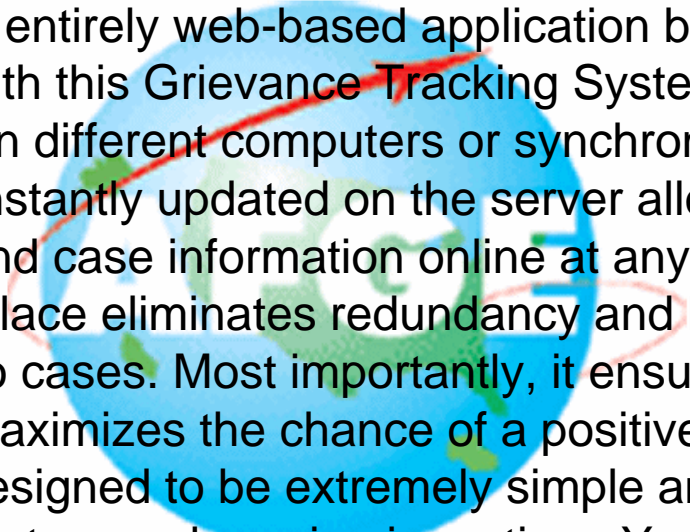AFGE CaseTrack is an entirely web-based application built on the latest internet technology. With this Grievance Tracking System there is no need to install multiple copies on different computers or synchronize data between machines. All data is instantly updated on the server allowing users to get up-to-the-minute reports and case information online at any time. Having all your grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution. CaseTrack has been designed to be extremely simple and intuitive to use, ensuring that you can get up and running in no time. You will find it easy to find grievance cases, start new ones, and generate reports on your cases.

Local User/Local Administrator

You have selected the "Local User/Local Administrator" Reports Training Sequence. The following presentation will teach you how to generate reports and manage the report data at the Local User or Local Administrator Levels.

As is the case throughout this presentation, click the mouse to view the next page.

Generating Reports

To generate a report, first click on the "Case Reports" button in the top navigation bar.

Generating Reports

Select either "Case Summary Report" or "Case Statistics Report." This demonstration uses a "Case Summary Report."

Generating Reports

Select a case type from the subsequent list.

Case Reports

Report Criteria

Select Case Type:

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

Continue

Microsearch Database Solutions

Generating Reports

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.

Case Reports

Report Criteria

Selected Case Type: Employee Grievance

| ResetCaseType | Reset Filter Criteria |

Filter Report By Local?   ⦿ No ○ Yes

Filter Report By Agency?   ⦿ No ○ Yes

Filter Report By Primary Issue?   ⦿ No ○ Yes

Filter Report By Secondary Issue?   ⦿ No ○ Yes

Filter Report By Case Start Date?   ⦿ No ○ Yes

Filter Report By Case Final Dispositon Date?   ⦿ No ○ Yes

Filter Report By Arbitrator?   ⦿ No ○ Yes

Filter Report By Case Disposition?   ⦿ No ○ Yes

Filter Report By Days In System?   ⦿ No ○ Yes

Filter Report By Due Date?   ⦿ No ○ Yes

Filter Report By Case Current Step?   ⦿ No ○ Yes

Generate Report   ResetCaseType   Reset Filter Criteria

Microsearch Database Solutions

Generating Reports

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.

Return To Criteria Selection

Print Version

☑ Case Designation ☑ Union Rep ☑ Assignment ☑ Agency
☑ Start Date ☑ Close Date ☑ Primary Issue ☑ Secondary Issues
☑ Disposition ☑ In System ☑ Due Date ☑ Step

Display Columns

Case Designation	Union Rep	Assignment	Agency	Start Date	Close Date	Primary Issue	Secondary Issues	Disposition	In System	Step	Due Date	
EG-NG-Local 3000-1-05	fitz jon	Local 3000	NG	10/5/2005		Absence Without Leave		Pending	0 Days	Step Two		Open Case
EG-NG-Local 3000-2-05	fitz jon	Local 3000	NG	10/5/2005		Awards		Pending	0 Days	Step One		Open Case
EG-NG-Local 3000-3-05	fitz jon	Local 3000	NG	10/5/2005		Change in Work Shift		Pending	0 Days	Arbitration		Open Case

Total Cases
3

Issues
Absence Without Leave 1 rec., 33.33 %
Awards 1 rec., 33.33 %
Change in Work Shift 1 rec., 33.33 %
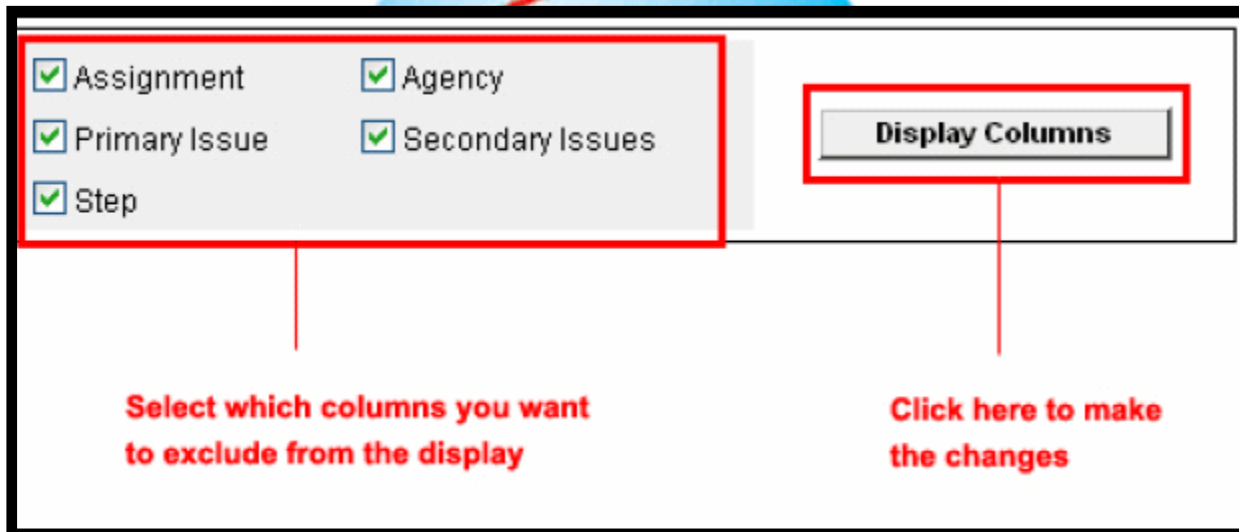
Dispositions
Pending 3 rec., 100.00 %

Case Assignments
Local 3000 3 rec., 100.00 %

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.

Summary Report Options

Ordering

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

Union Rep	Assignment	Agency	Start Date	Close Date	Primary Issue

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

Congratulations, you completed the Reports Training Program!