



# USPS-NALC Joint Step A Grievance Form

## INFORMAL STEP A — NALC Shop Steward Completes This Section

1. Grievant's Name ( <i>Last, first, middle initial</i> )		2. Home Telephone No.	
3. Seniority Date ( <i>MM/DD/YYYY</i> )	4. Status ( <i>Check one</i> ) <input type="checkbox"/> FT <input type="checkbox"/> FTF <input type="checkbox"/> PTR <input type="checkbox"/> PTF <input type="checkbox"/> TE		5. Grievant's SSN
6. Installation/Work Unit		7. Finance Number	
8. NALC Branch No.	9. NALC Grievance No.	10. Incident Date ( <i>MM/DD/YYYY</i> )	11. Date Discussed with Supervisor ( <i>Filing Date</i> )
12a. Companion MSPB Appeal? <input type="checkbox"/> Yes <input type="checkbox"/> No		12b. Companion EEO Appeal? <input type="checkbox"/> Yes <input type="checkbox"/> No	
13a. Supervisor's Printed Name and Initials ( <i>Completed by Supervisor</i> )		13b. Steward's Printed Name and Initials ( <i>Completed by Steward</i> )	

## FORMAL STEP A — Formal Step A Parties Complete This Section

14. USPS Grievance No.	
15. Issue Statement/Provide Contract Provision(s) and Frame the Issue(s)	
16. Undisputed Facts ( <i>List and Attach All Supporting Documents</i> )	Attachments? <input type="checkbox"/> No <input type="checkbox"/> Yes    Number _____
17. <b>UNION'S</b> full, detailed statement of disputed facts and contentions ( <i>List and Attach All Supporting Documents</i> )	Attachments? <input type="checkbox"/> No <input type="checkbox"/> Yes    Number _____
18. <b>MANAGEMENT'S</b> full, detailed statement of disputed facts and contentions ( <i>List and Attach All Supporting Documents</i> )	Attachments? <input type="checkbox"/> No <input type="checkbox"/> Yes    Number _____
19. Remedy Requested/Offered	
20. Disposition and Date ( <i>Check one</i> ) <input type="checkbox"/> Resolved <input type="checkbox"/> Withdrawn <input type="checkbox"/> Not Resolved	Date of Formal Step A Meeting ( <i>MM/DD/YYYY</i> )
21a. USPS Representative Name	21b. Telephone No. ( <i>Include Area Code</i> )
21c. USPS Representative Signature	21d. Date ( <i>MM/DD/YYYY</i> )
22a. NALC Representative Name	22b. Telephone No. ( <i>Include Area Code</i> )
22c. NALC Representative Signature	22d. Date ( <i>MM/DD/YYYY</i> )

# Instructions

---

If the initial Filing discussion between steward (and/or employee) and supervisor at Informal Step A does not resolve the grievance, the union steward may appeal the grievance by:

- Completing the "Informal Step A" section at the top of the form,
- Obtaining the supervisor's initials in Item 13, and
- Forwarding the form to union and management Formal Step A representatives within 7 days of the discussion.

## INFORMAL STEP A — NALC Shop Steward Completes This Section

Item	Explanation
1-9	Self-explanatory. All items are essential.
10	Enter the date when the event causing the grievance occurred or when the employee or union first became aware of the event.
11	Enter the date the employee and/or the union first discussed the grievance with the immediate supervisor at Informal Step A. This is the Step A filing date.
12a-b	Determine and indicate whether the grievant has filed an MSPB and/or EEO complaint on the same issue.
13a	The supervisor's printed name and initials confirm the date of the Informal Step A discussion.
13b	The steward's printed name and initials confirm the date of the Informal Step A discussion.

## FORMAL STEP A — Formal Step A Parties Complete This Section

- 14 The USPS grievance number is assigned by computer.
- 15 Frame the issue statement in the form of a question. Examples: "Was there just cause for the letter of warning dated 2/15/2002 issued to the grievant for unsatisfactory work performance, and if not, what is the appropriate remedy?" "Did management violate Article 8.5.G when the grievant was required to work overtime on 3/15/2002, and if so, what is the appropriate remedy?" If discipline is involved, always indicate the type of discipline (letter of warning, 7-day suspension, indefinite suspension, etc.) in the issue statement. Also, list specific contractual or handbook provisions involved in the grievance.

Note: The union steward may write a suggested issue in Item 15 when appealing to Formal Step A. The parties at Formal Step A are responsible for defining the issue as they see fit.

**Note:** If the grievance is resolved at Formal Step A, skip to Item 20 and note there the principles of the agreement. If the grievance is not resolved, complete Items 16 through 20.

- 16 Management and/or Union Representative: List all relevant facts not in dispute.
- 17 Union Representative: List any facts in dispute based on your understanding of the facts. Provide concise, descriptive statements outlining the union's position on the grievance.
- 18 Management Representative: List any facts in dispute based on your understanding of the facts. Provide concise, descriptive statements outlining management's position on the grievance.
- 19 Management Representative: Indicate remedy management is willing to offer.
- Union Representative: Provide a specific statement of the remedy the union is requesting. Example: "The LOW should be expunged from the record and the grievant made whole for all loss of wages, benefits, and rights."
- 20 Management and/or Union Representative: Note whether the case is resolved, withdrawn or not resolved. If resolved, note the principles of the agreement.
- 21-22 Enter names, telephone numbers, signatures, and date form is completed.