



NALC Branch 908 — Bill Revak



Postal Installation Grievance File Checklist — Joint Step A File Preparation

Purpose

This checklist may be used to assist in developing the **UNDISPUTED FACTS** of Joint Step A files. Use the checkboxes to track which documents have been gathered for each grievance type. Cross out categories that do not apply.

OVERTIME

- Overtime Desired List for the quarter
- Time cards / Employee Activity Report
- Carrier Form 1813
- Carrier Form 3996
- Carrier Form 3997
- Documentation of mail volume
- Notes &/or statements that explain: why OT was called, work performed on CT, availability of employees, why CT was not equitable

DENIAL OF LIGHT DUTY

- Employee's written request for light duty
- Medical documentation of physician that supports request
- Management's letter stating reasons for denial
- Management's statement detailing what jobs were considered and why they were rejected
- Carrier Form 1571
- Carrier Form 3997

CASUALS WORKED IN LIEU OF PTFs

- Carrier Form 1813s
- Relevant Form 3971's of affected employees
- Time cards / Employee Activity Report
- Carrier Form 3996

DISCIPLINE — AWOL / ATTENDANCE

- Letter(s) of charges
- Proposed Personnel Action
- Form 3971's
- Form 5972's
- Form 3997 (AWOL day)
- Fact Finding Documentation
- Medical certificate substantiating absences
- Supervisor's statement explaining denial of requested leave
- Carrier Form 3997
- Form 50's for affected employees
- Unit Compliment
- Supervisor's weekly Schedule
- Seniority Roster
- Casual Job Description
- Chartering of use of hours by casuals and PTFs
- Relevant provisions of the Local Memorandum (if applicable)
- Supervisor's statement about the need to use casuals

HOLIDAY SCHEDULING

- Leave Calendar
- Sign-up list for volunteers



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- Seniority List
- Holiday schedule with posting date
- Form 3997
- Form 1813 for the holiday
- Holiday scheduling provision of Local Memorandum of Understanding, Article 11
- Copy of disciplinary action
- Carrier statement of accident (Form 91)
- Vehicle Accident Investigation Worksheet (Form 1700)
- Street Observation Master Form (Form 4582A)
- Accident Report (Form 1769)
- Street Observation (Form 4584)

DISCIPLINE — VEHICLE ACCIDENT

- Copy of Proposed Personnel Action

DENIAL OF SPECIAL ROUTE INSPECTION (271-G)

- Carrier Form 1621
- Carrier Form 3996
- Proof of employee's inspection request
- Time cards / Employee Activity Report
- Supervisor's notes of any discussions with employee regarding performance
- Grievant's Statement about accident
- Police Report (if applicable)
- Investigators' / witnesses' notes taken at the accident scene

BID JOB REVERSION

- Reversion Notice
- Statement explaining why reversion was made
- Bid job listing showing who vacated or who ordered the position vacated and when

DEMAND FOR MEDICAL CERTIFICATION

- Form 3971's
- Form 3972's
- Medical certificate submitted by employee

- Grievant's prior job-related accident record

LETTERS OF DEMAND

- Copy of the Letter of Demand
- Form 3294 for Grievant
- Form 3368 for Grievant
- Form 3369 for Grievant
- Audit form leading to the Letter of Demand
- Form 3368's for others
- Grievant's training records
- Supervisor's statement explaining what events caused the request
- Copy of doctor's bill
- Grievant's statement of related expenses (mileage / lost time / physicians fees)

ALL DISCIPLINARY ACTION

- Letter(s) of Charges
- Proposed Personnel Action
- Supporting Documents



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- Fact Finding Documents
- Grievant's years with USPS

CROSSING CRAFTS

- Supervisor's Statement explaining: what craft usually does the work, which craft was assigned work, why assignment was made, how long the assignment was worked
- Documentation insufficient work
- Documentation of exceptionally heavy work

