**GENERAL LEVEL GRIEVANCE APPEAL FILE CHECKLIST**

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| The following checklist provides a list of necessary items required in the grievance file in order for the District 6 Staff Representative to hear this grievance at the general level, with the most information as possible to obtain a favorable outcome. |

* **Completed Statement of Occurrence (including email address, address and phone numbers)**
* Does Grievant want the grievance appealed to the next step? (Grievant must reply to Local before proceeding)
* Assign Individual Local Grievance #
* All Correspondence letters for grievance (Denials etc.)
* Defining Articles that are relevant and what settlement is expected?
* All Coaching Documents for the past 2-3 years (Udocs, My Coach or Compass)
* All Discipline Documents for the past 2-3 years
* Separation proposal and/or Termination document if applicable
* Job Accommodations & FMLA audits (if applicable)
* Attendance for the last 3 years
* Appraisals for the last 3 years
* Asset Protection Reports- Unredacted to include any attachments (if applicable)
* Ethics investigations/summary of findings
* Posted schedule for time frame that is relevant
* Scorecard for the past 12 months (Call Center/WFH)
* Copy of monthly dashboard results for the past 12 months (Retail)
* Screen and Video of recorded calls (if applicable) (links)
* Complete current copy of ANY Company Policies that has allegedly been violated.
* Training records for the past 3 years reflecting Company policies that were covered.
* Store videos if relevant for discipline
* All meeting notes - including investigatory, disciplinary & day in court and previous grievance levels.
* Forward any and all electronic records the Local received from the Company in reference to the grievance

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| Relevant notes regarding file and/or missing documents: |
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