



Division:	Human Resources (HR)
Title:	Standard Operating Procedures
Procedure:	DISCIPLINARY TRACKING SYSTEM & GRIEVANCE TRACKING SYSTEM GUIDELINES
Original Effective Date:	
Revised Effective Date:	4/10

Disciplinary Tracking System Guidelines

All disciplinary actions must be logged in the Beacon (SAP) System as follows:

Written Warnings, Demotions, Disciplinary Suspension and Dismissals:

See [Beacon Maintain Grievances Job Aid](#)

1. After logging into Beacon, access the Maintain HR Master Data screen by typing PA30 into the command field then press the ENTER key .
2. Enter the employee's personnel number. If you do not have the personnel number, use the matchcode  at the end of the yellow box and look the employee up by name.
3. Click on the Labor Relations Tab.
 - a. Click the button to the left of Grievance NA to select this Infotype.
 - b. Click the create button .
4. In the Create Grievance Infotype (0102), on the top toolbar, click Edit, Maintain text.
 - a. Type today's date and your initials.
 - b. Type a note explaining the basis for the action you are entering.
 - c. Click the Save  button.
5. Enter the effective date (date of employee/witness signature) in the "Start" box. The "To" box should remain 12/31/9999.
6. Click the Subtype box turning it yellow. Then click the matchcode box. 
 - a. Select #3 Disciplinary Action
 - b. Click enter button. 
7. Click the Reasons box turning it yellow. Then click the matchcode box. 
 - a. Select the appropriate description using one of the 12 listed, then click the enter button. 
8. Skip the Grievance Number box unless you number your grievances internally.
9. Enter today's date in the "Date Entered" field using month, day, year (01/20/2010) then click the enter button. 
10. Enter the Supervisor's personnel number, if known, or use the matchcode box  to look up the supervisor's name.
11. Click the enter button  then save your document .

If the employee files a grievance and an agreement has been reached, ADD A NOTE (Step 4) EXPLAINING AGREEMENT. ACTIONS CANNOT BE DELETED FROM BEACON, ONLY DELIMITED. The system will automatically take you to the next Infotype; Create Monitoring of Tasks (0019). This is a tool that you can use to remind you to remove the disciplinary action after 18 months. You can skip this step by clicking the back button. 

Monitoring of Task Guidelines

If you choose to use the Monitoring of Task as a reminder, follow the steps below:

12. Click the Task Type box, turning it yellow. Then click the matchcode box. 
 - a. Select the appropriate description (18 Months) then click the enter button. 
 13. Enter the date that the task is due in the Date of Task box. (18 months from the grievance effective date) using month/day/year (01/20/2010).
 14. Enter the date that you want to set your reminder to remove the disciplinary action (usually it is 1-2 weeks in advance) using month/day/year (01/20/2010).
 15. Skip the Lead/Follow up Time boxes.
 16. In the Comments section:
 - a. Type today's date and your initials.
 - b. Type a note explaining that you are removing the discipline and delimiting the Infotype in 18 months.
 17. Click the enter button  then save  your document
- To retrieve your Monitoring of Task's, you must print a BI Report. You will find the report under Personnel Administration, B0099 Employee Deadline Dates.**

Grievance Tracking System Guidelines

All grievances must be logged in the Beacon (SAP) System as follows:

18. After logging into Beacon, access the Maintain HR Master Data screen by typing PA30 into the command field then press the ENTER key .
19. Enter the employee's personnel number. If you do not have the personnel number, use the matchcode  at the end of the yellow box and look the employee up by name.
20. Click on the Labor Relations Tab.
 - a. Click the button to the left of Grievance NA to select this Infotype.
 - b. Click the create button 
21. In the Create Grievance Infotype (0102), on the top toolbar, click Edit, Maintain text.
 - a. Type today's date and your initials.
 - b. Type a note explaining the basis for the action you are entering.
 - c. Click the Save  button.
22. Enter the effective date (date the HR/Management receives Grievance form) in the "Start" box. The "To" box should remain 12/31/9999.
23. Click the Subtype box turning it yellow. Then click the matchcode box. 
 - a. Select 1 Grievance 3-Step No Mediation (unless participating as a pilot for mediation. Then select 2-Step Mediation is 1st Step).
 - b. Click enter button. 
24. Click the Reasons box turning it yellow. Then click the matchcode box. 
 - a. Select the appropriate description of the 24 listed, then click the enter button. 
25. Skip the Grievance Number box unless you number your grievances internally.
26. Enter today's date in the date entered field using month, day, year (01/20/2010) then click the enter button. 

27. Enter the Supervisor's personnel number if known or use the matchcode box  to look up the name.

28. Click the "Time From" box turning it yellow. Then click the matchcode box. 

a. Chose the best fitting example that tells what step you are entering:

- i. Initial Filing-**DO NOT USE**
- ii. 1-Step 1-Immediate Supervisor
- iii. 1-Step 2-Unit Director
- iv. 1-Step 3-Secretary of DHHS for Hearing
- v. 2-Mediation-Step 1
- vi. FAD-Final Agency Decision
- vii. OAH-Office of Administration Hearing
- viii. SPC-State Personnel Commission
- ix. Court-Superior Court

29. The Resolved At box will stay empty until the grievance has been resolved.

30. Click the enter button  then save  your document.

If the Grievance is denied and moves to another step in the process, you will delimit the current Grievance and enter the new information following these steps.

31. Go back into PA30 using steps 18-20. Instead of clicking the Create button, you will click the Delimit button .

It will ask you if today's date is the delimit date. If it is, click , if not, type the delimit date. The next box will tell you that the end date is 12/31/9999; click . You will be in the Delimit Grievances NA (0102) Infotype.

32. Select the Grievance that you wish to delimit by clicking the blue box to the left; then click the Delimit button .

You will go back to the previous screen. By clicking the Overview button , you will see that the Grievance you selected has now been delimited and has a different End date that is no longer 12/31/9999. Continue to follow steps 18-28 until the Grievance is resolved.

Once the grievance has been resolved, you will return to the employee's Grievance Infotype using the steps 18-20 a. In the Subtype (Sty) box at the bottom on the Infotype, type in the number 1 then click the green check .

Click the Copy button .

33. ADD A NOTE (Step 4) EXPLAINING RESOLUTION.

34. Change the start date to the date of the Grievance you are entering and the end date to 12/31/9999.

35. Click the "Time From" box turning it yellow. Then click the matchcode box. . Chose the best fitting example that tells what step you are entering.

36. Click the Resolved At box turning it yellow, then click the matchcode box  and enter the level the decision was made.

37. Click the Results box. Then click the matchcode box  and enter the final decision.

38. If the grievance was settled, enter the date in the Date Settled box using month, day, year (01/20/2010).

39. Click the enter button  then save  your document

40. Once grievance is resolved, change to date (currently 12/31/9999) to date of resolution, which delimits the Infotype.

If the Grievance was settled, enter any settlement cost in the Estimated Cost box.