

## **Formal Step A Request for Meeting**

Stewards, the Formal Step A – Request for Meeting is the form that is used to appeal to Formal Step A to attempt to resolve the grievance at the second step of the Dispute Resolution Process. This guide is designed to assist stewards to ensure that the form is completed properly and in its entirety.

Article 15 of the JCAM states the following regarding Formal A Meetings:

*If the parties are unable to resolve the grievance during the Informal Step A meeting the union may file a written appeal to Formal Step A within 7 calendar days after the meeting.*

*The time limits for filing a grievance at Informal Step A or appealing to Formal Step A may be extended by mutual agreement.*

*The steward appeals a grievance to Formal Step A by filling out the Informal Step A portion of the NALC-USPS Joint Step A Grievance Form (PS Form 8190) and sending it to the installation head or designee. The grievance appeal to Formal Step A should include relevant documents that were shared and discussed at the Informal Step A meeting. When appealing a grievance to Formal Step A, day one is the day following the receipt of the supervisor's oral decision. In appealing any grievance beyond Informal Step A, a union representative has until the last day to mail the appeal. Thus, the appeal must be postmarked or signed as received on the seventh day following the Informal Step A decision (for example, on the tenth if the decision is received on the third). To avoid problems union representatives should not wait until the last day.*

### **15.2 Formal Step A (a)**

#### **Formal Step A (a)**

*(a) The Joint Step A Grievance Form appealing a grievance to Formal Step A shall be filed with the installation head or designee. In any associate post office of twenty (20) or less employees, the Employer shall designate an official outside of the installation as the Formal Step A official, and shall so notify the Union Formal Step A representative.*

### **15.2 Formal Step A(b)**

*(b) Any grievance initiated at Formal Step A, pursuant to Article 2 or Formal Step A or 14 of this Agreement, must be filed by submitting a Joint Step A Grievance Form directly with the installation head within 14 days of the date on which the Union or the employee first learned or may reasonably have been expected to have learned of its cause.*

*15.2 (c) The installation head or designee will meet with the steward or a Formal Step A (c) Union representative as expeditiously as possible, but no later than seven (7) days following receipt of the Joint Step A Grievance Form unless the parties agree upon a later date. In all grievances at Formal Step A, the grievant shall be represented for all purposes by a steward or a Union representative who shall have authority to resolve the grievance as a result of discussions*

*or compromise in this Step. The installation head or designee also shall have authority to resolve the grievance in whole or in part.*

The first step is to identify the Designee you will be asking to meet with for the Formal Step A Meeting. Make sure you have their full, proper name listed in the area marked:

**To:** \_\_\_\_\_, *USPS Formal Step A representative*

Next, always make sure the date is accurately recorded on the Request for Formal Step A Meeting

**Date** \_\_\_\_\_

Always keep in mind the date of the grievance. If the Formal Step A Request for Meeting is filed after the 7-day window and the grievance is moved further along the Dispute Resolution Process, management can argue untimeliness. For example, if you appeal to Formal A on the on the 10<sup>th</sup> of the month when your Informal A Meeting was on the 1<sup>st</sup>, that would be nine day difference. Therefore, the grievance being appealed to Formal Step a is untimely.

Next, identify which Carrier or how many Carriers are involved in the grievance. If it is regarding one Letter Carrier, then state the individuals entire name on the line marked:

**Regarding:** \_\_\_\_\_

*(Name or Class Action)*

*(Issue)*

If the Formal Step A Request for Meeting is for two Letter Carriers or more than it should be filed as a Class Action. It can be abbreviated as “CA” or “C/A” but always try to type Class Action into all areas that require it to avoid any confusion.

Right next to the “Regarding” area is the part labeled “(Issue)”. This part describes what the grievance is about. Always identify which article of the National Agreement the grievance is related to and a brief description of which section of the article it applies to.

**Regarding:** \_\_\_\_\_

*(Name or Class Action)*

*(Issue)*

Some examples are:

*Article 8.5 – OT & Mandating Violations*

*Article 41.2.B – Opting*

*Article 19 – Handbooks and Manuals*

The next part is the date of incident. Always put the date of incident to keep the steward of aware of the 14-day time limit.

**Date of Incident:** \_\_\_\_\_ **Branch Grievance #** \_\_\_\_\_

Page 15-2 of the JCAM states:

**Informal Step A** (a) Any employee who feels aggrieved must discuss the grievance with the employee's immediate supervisor within fourteen (14) days of the date on which the employee or the Union first learned or may reasonably have been expected to have learned of its cause. This constitutes the Informal Step A filing date. The employee, if he or she so desires, may be accompanied and represented by the employee's steward or a Union representative. During the meeting the parties are encouraged to jointly review all relevant documents to facilitate resolution of the dispute. The Union also may initiate a grievance at Informal Step A within 14 days of the date the Union first became aware of (or reasonably should have become aware of) the facts giving rise to the grievance. In such case the participation of an individual grievant is not required. An Informal Step A Union grievance may involve a complaint affecting more than one employee in the office.

The Branch grievance number is an important part that must be addressed. The Procedure of Branch 421 is to call the Union Hall and speak to someone who can give you a local grievance number. This grievance number will be used at all steps of the Dispute Resolution Process up to the Step B DRT.

Date of Incident: \_\_\_\_\_ **Branch Grievance #** \_\_\_\_\_

The next section you will notify management what day you will not be available to meet for the Formal A meeting. Include your SDO and any other leave you will be taking during the 7-day time limit for appealing to Formal A barring a mutually agreed upon extension. Include a cell/mobile number that you can be reached at. Also, include the station number you can be reached at if management needs to contact you.

I will be unavailable \_\_\_\_\_ I can be reached at (\_\_\_\_) \_\_\_\_ - \_\_\_\_ / (\_\_\_\_) \_\_\_\_ - \_\_\_\_  
Date(s) Cell# Station#

The following two lines will show who is meeting for the Formal A meeting. The designated steward to handle the grievance and the Formal A designee will both need to sign and acknowledge that they will be meeting at Formal A. Print your name, initials, the date, and the time that you requested the Formal A meeting. The next line you will have management print their name, initials, the date, and what time the Formal A meeting was requested.

\_\_\_\_\_ Date \_\_/\_\_/\_\_ Time \_\_ AM/PM  
NALC Formal A Steward's Printed Name NALC Formal A Signature

\_\_\_\_\_ Date \_\_/\_\_/\_\_ Time \_\_ AM/PM  
USPS Formal A Representative's Name USPS Formal A Signature

The next block requires management to decide what day and time the Formal A meeting will be held. The first line management must determine what day and what time the Formal A Meeting will be held. Have them fill out the first line starting with “Date....”.

*Date* \_\_\_\_/\_\_\_\_/\_\_\_\_ *Time:* \_\_\_\_\_ *AM/PM*

The last line will require the Formal A designee to fill to sign their name and their title.

*Signed* \_\_\_\_\_ *Title* \_\_\_\_\_ *USPS*