

STANDARD GRIEVANCE FORM

Use additional pages
for any section of
this form, if necessary

NAME OF EMPLOYEE		OFFICE TELEPHONE <i>405/224-0802</i>
OFFICE LOCATION <i>Chickasha, Ok.</i>	POSITION <i>SR</i>	GRADE <i>GS-8</i>
REPRESENTED BY: <input type="checkbox"/> SELF <input checked="" type="checkbox"/> UNION	REPRESENTATIVE NAME <i>Glenn Shropshire</i>	REP TELEPHONE <i>405/222-3325 NO</i>

Description of grievance. What article(s) of the Agreement are involved?

See attached.

Relief sought:

I want to be treated in a civil manner and I want the harassment to stop. Mr. Belis owes me an apology for the way he treated me on 8/20/02. I feel my current medical condition is due to the stress on the job.

I hereby authorize my representative to examine any appropriate official document, personnel record, or medical information which may be related to the grievance.

EMPLOYEE SIGNATURE <i>[Signature]</i>	DATE <i>8/23/02</i>
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STEP 1 SUBMITTED

SUPERVISOR <i>[Signature]</i>	TELEPHONE <i>405 224-0802</i>	ORAL PRESENTATION REQUESTED <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	DATE RECEIVED <i>8-28-02</i>
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On August 20, 2002 a claimant and his payee came into the office requesting to talk to the manager regarding an immediate payment. The check had gone to the former payee and had been returned to United States Treasury. A non-receipt with a C-stop was filed around August 8th and the MBR showed rectification was processed the same day the claimant was requesting immediate payment.

I informed Mr. Biles that the payee was here and requested to speak with him regarding an IP. Mr. Biles insisted that the IP was my decision and when I disagreed, he proceeded to spend a lot of time pulling up POMS references and making me read them while he kept demanding that I make the decision. Meanwhile, the waiting room had standing room only while he cited me for poor public service for making the payee wait 45 minutes. The office cashier, who is also TE, and local union representative, agreed with me but could see how stressed I was and suggested that I start the process and she would issue the check for \$969.00 to the payee.

Mr. Biles did not speak with the payee but left for lunch while we processed the IP and were left to apologize for the delay in processing the IP. The TE later located a desk guide which clearly states that an IP is a management decision.

I was extremely stressed and felt very intimidated by Mr. Biles' attitude and conduct. In fact it was very difficult for me to maintain my composure throughout the rest of the day and for the rest of the week for that matter. Yesterday and today I have been trying to fight off anxiety attacks which elevate my blood pressure to stroke level.

Mr. Biles claims that I am not capable of SR duties but demands that I make management decisions.

DISPOSITION OF GRIEVANCE

NAME OF EMPLOYEE

Dianna Baxter

STEP 1 DECISION BY:

TITLE <i>District Manager</i>	SIGNATURE <i>John Biles</i>	DATE <i>9-11-02</i>
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DECISION (Enter disposition summary here and check block if narrative attached)

See Attached

RECEIPT ACKNOWLEDGED BY EMPLOYEE OR UNION REPRESENTATIVE <i>Glenna L. Shropshire</i>	DATE <i>9-11-02</i>
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Grievance Resolved
 Proceed to next Step
 Oral Presentation Requested
 Photocopy to Union

AS NEEDED, DESIGNATE STEP 2 OFFICIAL →	NAME <i>Kellen Ruffredge</i>	LOCATION <i>Lawton, Ok.</i>	TELEPHONE <i>580-357-8087</i>
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STEP 2 DECISION BY:

TITLE	SIGNATURE	DATE
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PERSON SERVED	<input type="checkbox"/> MAIL <input type="checkbox"/> DIRECT	DATE
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DECISION (Enter disposition summary here and check block if narrative attached)

RECEIPT ACKNOWLEDGED BY EMPLOYEE OR UNION REPRESENTATIVE	DATE
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Grievance Resolved
 Proceed to next Step
 Oral Presentation Requested
 Photocopy to Union

AS NEEDED, DESIGNATE STEP 3 OFFICIAL →	NAME	LOCATION	TELEPHONE
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STEP 3 DECISION BY:

TITLE	SIGNATURE	DATE
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PERSON SERVED	<input type="checkbox"/> MAIL <input type="checkbox"/> DIRECT	DATE
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DECISION (Enter disposition summary here and check block if narrative attached)

RECEIPT ACKNOWLEDGED BY EMPLOYEE OR UNION REPRESENTATIVE	DATE
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Grievance Resolved
 Yes No Photocopy to Union

FOR LABOR AND EMPLOYEE RELATIONS STAFF USE →	Grievance Code:	Disposition:	Disposition Level:
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Date: September 11, 2002

Ms. Glenna Shropshire
Union Representative
Social Security Administration
506 W. Utah Ave.
Chickasha, OK 73018

Dear Ms. Shropshire:

This is in response to the Step 1 grievance filed on behalf of [redacted] on August 28, 2002. [redacted] alleges she was not treated in a civil manner on August 20, 2002 while she was attempting to process an immediate payment for a claimant. The relief she seeks is an apology for the treatment she received and to be treated in a civil manner. An additional relief is that the harassment cease.

No oral presentation was requested.

One of the critical elements of the service representative position involves providing explanations of technical provisions, eliciting relevant facts and resolving problems with payments or eligibility. Of paramount importance for any employee is the ability to research, interpret and properly apply policies and procedures. There have been numerous discussions and training sessions regarding these responsibilities and the potential problems associated with asking a co-worker for answers or trying to hand off work to them or to a member of management.

On the August 20, 2002, [redacted] came to me asking whether or not a CPS could be done for the individual in question. In addition, a determination was needed as to whether or not an IP could be issued. I asked [redacted] if the dire need situation claimed by the Payee met the criteria in POMS. She replied, "I don't know". At this point I told her we would look in the SR Resource Kit for the CPS guide to determine if the Number Holder's dire need met the requirements in POMS. After the CPS guide was reviewed, [redacted] determined the dire need did meet the statutory requirements. Next, we had to determine if an IP could be issued. We reviewed the SR Resource Kit and POMS. It was determined an IP could be issued to the Number Holder. [redacted] then stated, "you have to approve the IP". I explained to [redacted] that a member of Management did not have to approve the T2 IP. It was only in T16 cases when I had to sign off on the IP. She insisted I had to approve the IP because she was incorrectly referring to the T16 IP/EAP guide. Therefore, I showed her in POMS where it stated the approving official did not have to be a member of management. In addition, [redacted] had the TE read the same POMS section.

While I will provide the review and required second signature for critical and immediate payment request, the decision to make such a payment lies with the service representative, after they have carefully reviewed the case facts, policies and procedures.

The discussion between Ms. Baxter and myself was conducted in my office, away from other employees or members of the public. Although I pulled the POMS references for her, I reminded her that the initial decision was hers to make. She was in no way mistreated; she was treated with courtesy and respect.

Based on the above and the fact that Ms. Baxter was treated in a civil manner and was not harassed, an apology is unwarranted and the relief you seek on her behalf is denied.

This decision may be appealed to the Step 2 official within five (5) working days after receipt of this decision.

John Biles
District Manager

September 15, 2002

On August 20, 2002, Ms. Shropshire, who is the TE, answered the phone call from the Payee who was requesting an IP. She told him that only the manager could authorize an IP and it would be necessary for him to come into the office and talk with Mr. Biles.

The Payee and the Number Holder did come in asking and expecting to talk with Mr. Biles about an IP. I tried to determine what was needed to see if I might be able to help them. I don't need management approval for a CPS so I tried to see if that would be acceptable instead of an IP. The Payee expressed dire need and was adamant that we issue an IP.

I approached Mr. Biles with the request that they talk to him in regard to an IP. I did not go to him with a CPS request. I tried to explain to him that the CPS screens are only a part of the IP process and a CPS was not the issue. I'm not sure he understood the difference.

After much discussion I requested the Ms. Shropshire also come to Mr. Biles' office because she is the person who issues the checks in our office. She told Mr. Biles that she had talked to the Payee earlier and told him that the management must approve an IP. She can attest to how I was treated and the attitude displayed by Mr. Biles.

I wish to appeal to the Step 2 official.