

Union Grievance Intake Checklist

Blank worksheet | Part 1: Intake and source records

Record the concern as reported. Mark unconfirmed details and assign review. This worksheet does not file a grievance or establish whether a contract violation occurred. Attach more pages if needed.

01 / Identify the matter

Case / intake reference:

Received date / time:

Member or affected group / bargaining unit:

Employer / agency / work location:

Intake representative / approved contact-record location:

02 / Record the account

Issue as reported (separate the account from your assessment):

Event, notice and receipt dates (identify the source and any uncertainty):

Requested remedy / outcome (not an agreed result):

03 / Identify available information

Key documents / approved file location / missing records:

Potential witnesses / information to confirm:

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Blank worksheet | Part 2: Procedure review and next actions

Case / intake reference:

Procedures and deadlines depend on the applicable CBA, policy, statute and jurisdiction. Promptly refer time-sensitive questions to the appropriate qualified representative. Do not wait for every field to be complete.

04 / Make deadline review traceable

Governing document / effective period / article or section:

Triggering event / source record / counting assumptions:

Possible or confirmed deadline / time / review status:

Reviewer / review date / extension record, if any:

05 / Assign responsibility

Immediate next action / owner / backup:

Internal preparation target / unresolved question / person to resolve it:

Member update / responsible person / follow-up date:

06 / Before moving forward

- ☐ Reported facts, source documents and unconfirmed details are distinguishable.
- ☐ Urgent dates have an assigned reviewer and the next action has an owner.
- ☐ The case record is stored with appropriate access and handling restrictions.

Guide: labornexa.com/resources/union-grievance-intake-checklist.html

Use your union's required filing and service process. This is not legal advice.