

# Integrated Management System (IMS) Private Application Release Memo April 18, 2011

The functionality of the Private application remains the same with the exception of the following enhancements:

## Charge Detail Inquiry (CDI) Report with Notes option

- On the Workload, Find Charge Results screen, Workload Management, View/Modify Charge and Forms & Letters screen, you have the option to include notes when requesting the CDI report.

Integrated Mission System - Private Sector Charge Management User Logon = (ABONNER); Charge Owner = (Bonner, Audrey)

IMS Utilities Help Window ORACLE

Workload - (V 4.1.1)

Charge Processing Workload Mgmt. IMS Reports EEO-1 Analytics

Staff: Bonner, Audrey

Display All Inquiries Only Charges Only Acknowledge Receipt of Checked Items

EEOC Number	FEPA Number	Charging Party	Respondent	Date Assig...	Proc. Cat.	Comm. ...	Age
<input type="checkbox"/>	25A-2010-00006C	2010-00007	Marshall, Marshall	JIFFY LUBE	08/04/2010	B	203
<input type="checkbox"/>	423-2009-01436C		Hogan, Keisha	GOLD STRIKE CASINO	08/04/2010	B Phone Corr	13
<input type="checkbox"/>	490-2008-00914C		Noel, Kimberly	BROWN WILBERT INC	08/04/2010	B Walk-In Cor	1108
<input checked="" type="checkbox"/>	490-2008-01162C		Van Der Linden, Paul G.	VELSICOL CHEMICAL CC	01/14/2011	B Walk-In Cor	1081
<input type="checkbox"/>	490-2008-02945C		Kagen, B			B Walk-In Cor	897
<input type="checkbox"/>	490-2009-00024C		Biggs, D			B Walk-In Cor	846
<input checked="" type="checkbox"/>	490-2010-00002N		Miller, Yv				0
<input checked="" type="checkbox"/>	490-2010-00008N		Ganaway				0
<input type="checkbox"/>	490-2011-00047N		Smith, M				0
<input type="checkbox"/>	490-2011-00048N		Smith, M				0
<input type="checkbox"/>	490-2011-00049N		Smith, D				0

Charge Detail Report: Do you want NOTES for each charge? Yes No

Select All Send to Workload Management Unassigned

Deselect All CP - Home (901) 287-0463 Work Cell View/Modify

Check to Select Record: 8/11 <OSC>

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## Action – Distinguishing duplicate staff names

- Staff drop downs will now display the office code and function of the staff in addition to the staff's first and last name. This is helpful to distinguish staff with different functions or staff supporting more than one office.

**Action**

Action Date: 01/27/2011    Action Code: H2    Charging Party: Van Der Linden, Paul G.

Action Group: Investigation (Mandatory)    EEOC No.: 490-2008-01162C

Action Description: H2 - On-Site Conducted  
 Reporting Office: Memphis District Office    FEPA No.:  
 Comments:

**Attribute**

Title: Attorney

Staff 2: \_\_\_\_\_

Staff 3: \_\_\_\_\_

Staff 4: \_\_\_\_\_

**Action History**

Action Date	Ser. No.	Action Code	Reporting Office	Fun Un Del	Created By	Create Date
01/21/2011	24	M1 - Withdrawal With Benefits	Memphis District Office	I 1	ABONNER	01/21/2011
01/14/2011	23	G1 - Assigned To Staff	Memphis District Office	I 1	ABONNER	01/14/2011
01/14/2011	22	G1 - Assigned To Staff	Memphis District Office	I 1	ABONNER	01/14/2011

Value: Record: 1/1    <OSC>

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## New Inquiry – additional functionality

- Now, you are able to duplicate the Notes and Additional Address information on New Inquiries. After Notes and/or Addresses are added to a new inquiry, the new checkboxes are available to select which you want to duplicate for the next new inquiry.
- New checkboxes: **Keep notes, Keep additional address.**

**Charge Information**

Receiving Office \* Memphis District Office    Initial Inquiry Date \* 03/02/2011    EEOC Number  
 Intake Staff \* Bonner, Audrey    Intake Unit \* 1    FEPA Number

**Charging Party**

Keep charging party for next inquiry

Keep notes     Keep additional address

Name Prefix    Name Suffix  
 First Name Jane    Middle Initial  
 Last Name \* Doe  
 Address Line1  
 Address Line2  
 City  
 State    Zip Code  
 Country United States Of America  
 Email Address  
 Home Phone (222) 499-8888    Cell Phone  
 Work Phone    Extension  
 Fax    Date Of Birth  
 Sex Female  
 Ethnicity/Race/National Origin

**Respondent**

Keep respondent for next inquiry

Name  
 Address Line1  
 Address Line2  
 City  
 State    Zip Code  
 County  
 Country United States Of America  
 Phone    Extension  
 Fax  
 Email Address  
 Institution Type  
 Employer Size Unknown Number Of Employees  
 EEO-1 Headquarters  
 EEO-1 Unit

**Other Actions**

Add Allegation 0 Records    Add Note 0 Records    Add Address 0 Records

Apply    Next    Done    Cancel

Keep charging party for next inquiry  
 Record: 1/1    <OSC>

# Integrated Management System (IMS) Private Application Release Memo April 18, 2011

## Search – additional search criteria

- Search by **EEO-1 HQ Number** and **EEO-1 Unit Number** have been added to the Find Charge and Search Respondent screens.

The screenshot displays the IMS Private Sector Charge Management interface. The top window shows the search criteria form with the following fields:

- Workload Management (selected)
- Search Criteria: Results (8)
- Fields: EEOC Number, FEPA Number, CP Last Name, CP First Name, CP Telephone, Investigator, Statute, Processing Category, Process Type, Communication Method, Closure Action, Receiving Office, Accountable Office, Lead Charge Number, NCC Incident Number, Respondent, EEO-1 Hdq. Number, EEO-1 Unit Number (with a search filter 'B426%'), Initial Inquiry Date, First Office Date, District Date, Cause Finding Date, Charge Age.
- Status:  Intake,  Open,  Closed,  All,  Include Deleted Charges
- Buttons: Find Charge, New Inquiry, Forms / Letters, Exit, Clear All, List Charges.

The bottom window shows the search results table:

EEOC Number	FEPA Number	Charging Party	Respondent	Investigator	Stat	CA	PC	Age	Del
<input checked="" type="checkbox"/> 24D-2008-00333C	EC-0105-A8	Howard, Joann	EXEL INC	Dayharsh, Andrea	O		B	987	<input type="checkbox"/>
<input type="checkbox"/> 440-2009-01005C		Ramos, Maely	EXEL INC	Carmichael, Robert	O		B	800	<input type="checkbox"/>
<input type="checkbox"/> 440-2009-02038C		Key, Jr., Joseph	EXEL INC	Harrison, Jacquelyn	O		B	742	<input type="checkbox"/>
<input type="checkbox"/> 494-2008-02840N		Haney, Dustin L.	EXEL INC.	Reed, Tramaine	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 530-2008-03532C		Randall, Roy V.	EXEL, INC.	Gurmankin, Howard	O		B	806	<input type="checkbox"/>
<input type="checkbox"/> 532-2008-01513C		Traylor, Phillip C.	EXEL INC	Connor, Veta	O		B	871	<input type="checkbox"/>
<input type="checkbox"/> 532-2008-02309C		Purdy, Stephany	EXEL INC	Shelton, Brian	O		B	820	<input type="checkbox"/>
<input type="checkbox"/> 532-2009-00832C		Seay, Lisa D.	EXEL INC	Cabot, Daniel	O		B	703	<input type="checkbox"/>

Buttons at the bottom: Select All, Deselect All, View / Modify.

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## Workload – Corrected charge age sort

- The Age sort button wasn't sorting charge age correctly. This has been corrected. Now, in addition to the Age button being a toggle button, all columns sort as a toggle button. This means, with each click of any of the column headings, the sort will alternate between **ascending** and **descending**.

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IMS Utilities Help Window ORACLE

Workload - (V 4.1.1)

Charge Processing Workload Mgmt. IMS Reports EEO-1 Analytics

Staff: Bonner, Audrey

Display All Inquiries Only Charges Only Acknowledge Receipt of Checked Items

EEQC Number	FEPA Number	Charging Party	Respondent	Date Assig...	Proc. Cat.	Comm. ...	Age
490-2010-00002N		Miller, Yvonne	THE RESERVE AT MARTI	08/04/2010			0
490-2010-00008N		Ganaway, Jr., Marvin	RADIO SHACK	08/04/2010			0
490-2011-00047N		Smith, Mary A.	JIFFY LUBE	01/21/2011			0
490-2011-00048N		Smith, Mary A.	RED LOBSTER	01/21/2011			0
490-2011-00049N		Smith, Debra M.		01/24/2011			0
423-2009-01436C		Hogan, Keisha	GOLD STRIKE CASINO	08/04/2010	B	Phone Corr	13
25A-2010-00006C	2010-00007	Marshall, Marshall	JIFFY LUBE	08/04/2010	B		203
490-2009-00024C		Biggs, Darrell K.	SIMOS INSOURCING SOI	08/17/2010	B	Walk-In Cor	846
490-2008-02945C		Kagen, Beulah A.	BURGER KING	01/21/2011	B	Walk-In Cor	897
490-2008-01162C		Van Der Linden, Paul G.	VELSICOL CHEMICAL CC	01/14/2011	B	Walk-In Cor	1081
490-2008-00914C		Noel, Kimberly	BROWN WILBERT INC	08/04/2010	B	Walk-In Cor	1108

Select All Send to Workload Management Unassigned

Exit Deselect All CP - Home (910) 728-2521 Work Cell View/Modify

Check to Select Record: 1/11 <OSC>

# Integrated Management System (IMS) Private Application Release Memo April 18, 2011

## Related Address – New button

- A new button, “Copy Address from Charging Party Record” has been added to the Additional Address screen. Selection of this button populates the screen with the CP’s address.

Integrated Mission System - Private Sector Charge Management User Logon = (ABONNER); Charge Owner = (Bonner, Audrey)

IMS Utilities Help Window ORACLE

Add / Modify Additional Address - (V 4.1.1)

**Additional Address**

Charging Party Van Der Linden, Paul G.  
EEOC Number 490-2008-01162C  
FEPA Number

Keep address information for next contact.

Relationship \*  
Prefix  
First Name  
Last Name \*  
Middle Initial  
Suffix  
Title  
Organization  
Address Line1  
Address Line2  
City State Zip Code  
Country United States Of America  
Email Address  
Phone Ext.  
Cell Phone  
Fax

Done  
Record: 1/1 <OSC>

# Integrated Management System (IMS) Private Application Release Memo April 18, 2011

## Benefit – Workplace Practice/Policy Change Rule

- Workplace benefits are only allowed on settlements (M2 action) and conciliations (M4 action). The hint and tooltip will display as **“Workplace Practice/Policy Change – Only 1 per charge – Permitted for M2/M4 actions only”**

Integrated Mission System - Private Sector Charge Management User Logon = (ABONNER); Charge Owner = (Bonner, Audrey)

IMS Utilities Help Window ORACLE

Add / Modify Benefit - (V 4.0.0)

**Benefit Group**

Closure Action\* 14-JAN-09 : 16 : M2-Settlement With Benefits Charging Party Biggs, Darrell K.  
 Number of Persons Benefitted\* 1 Benefit Group 1 EEOC No. 490-2009-00024C  
 FEPA No.

**Benefit Details**

Closure Action\* 14-JAN-09 : 16 : M2-Settlement With Benefits Allegation Number\* Charge

**Allegation Details**

Statute	Basis	Issue	First Alleged	Last Alleged

**Monetary:**

Restored Pay  
 New Hire  
 Promotion  
 Fringe Benefits  
 Reinstatement/Recall  
 Other Monetary (Projected)  
 Other Monetary (Actual) \$5,867.00  
 Compensatory Damages  
 Punitive Damages  
 Attorney's Fees

**Non-Monetary:**

Policy Change  Union Membership  
 Training/Apprentices...  Other Non-Monetary Benefit  
 Religious Accomoda...  EEO Notices  
 Seniority  Reasonable Accomodation  
 Job Referral

**Workplace:**

Workplace Practice / Policy Change

Apply Next Done Cancel

Workplace Practice / Policy Change - Only 1 per charge - Permitted for M2/M4 actions only  
 Record: 1/1 <OSC>

# Integrated Management System (IMS) Private Application Release Memo April 18, 2011

## View/Modify Charge - the columns on the Notes tab are now sort buttons

- Subject, Staff and Date are sort buttons which toggle between ascending and descending with each click.

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IMS Utilities Help Window ORACLE

Inquiry / Charge Information - (V 4.1.1)

Charge Processing Workload Management IMS Reports

Workload

EEOC Number 490-2008-01633C Find Clear

Charging Party Eldridge, Stephen

FEPA Number Respondent QPSI DISPLAY SERVICE & PACKING

Information Charging ... Respond... Allegation Action Benefit Notes Related ... Additional... EEO-1 Forms Log User Defi... Audit Log

Subject	Staff	Date
<input checked="" type="checkbox"/> testing	Bonner, Audrey	06/04/2010
<input type="checkbox"/> Stephen Eldridge v. QPSI	Blanks, Tyrone	03/28/2010
<input type="checkbox"/>		
<input type="checkbox"/>		

Select All Deselect All Print Selected Notes Add Modify Delete

Note Detail

this is a test of the emergency broadcast system.

Forms / Letters

Charge Detail

Exit

Staff Record: 1/2 <OSC>