

Integrated Management System (IMS)

Private Application Release Memo

December, 2010

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

Add/Modify Actions

- Users are no longer able to submit E action codes for charges that have an EEOC office as both the Receiving office and Accountability office.
- Action code E4 (FEPA Finding Rejected – no rework) has been modified so that this action code can only be submitted when the subject charge has been closed.
- Previously, when action code Z4 (Charge Deleted) was submitted the attribute 'Error' required a charge number. This has been corrected so that no charge number is required to be input. *See Figure 1.*
- Action code A0 (Transfer To) cannot be submitted if action code B2 (EEOC Auto-Xfers FEPA Chg) exists for the subject charge. If action code B2 does exist, then a message is displayed, "This charge has an active B2 action, therefore it cannot be TRANSFERRED" and the action code field is cleared.
- When submitting closure action M3, (No Cause Finding Issued), the closure screen is activated. Only allegations not associated with the J1 action (Cause Finding Issued) will display. Conversely, when submitting closure action M4 (Successful Conciliation) or M5 (Conciliation Failure), only allegations which have a J1 action associated with it will display.
- Clarification was give for action code Q5 (To Justice Dept. For Lit. Review) that it can be submitted for

all public employer charges, to include:

- 1) G-State/Local Govt
- 2) I-Public College/University
- 3) K-Public Elem/Secondary School
- 4) S-Public Employment Agency

Forms & Letters

- The EEOC charge number has been increased to 11pts on pages 1 and 2 on the Form 5. The FEPA number remains at 9pts because it can be up to 25 characters. *Figure 2.*
- The Forms & Letters access rights have been modified so that users can only run forms and letters for those charges which fall in the range of the user's read level. When running a single charge if the user enters a charge number that does not fall within their access rights, a message displays saying, "Your read level is 1 (2). You may only generate forms and letters for charges assigned to you (your office)." For multiple charges, if a user enters a charge number that they cannot access based on their read level, a message displays: "No records found. Please verify your READ LEVEL to ensure you have rights to generate the specified charges."
- The FM 131 has been enhanced to include the office fax number. *Figure 3.*
- The Agreement to Mediate form now populates the CP and RSP home and cell phones, legal representative

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name and legal representative phone and cell phone number fields, and signature blocks. *Figure 4.*

- The PCHP Assessment form now populates the statues, basis and supervisor fields. *Figure 5.*
- Investigator's Phone number has been added as merge field code "Field250" for use in Ad-hoc queries.

Add/Modify Additional Address

- Previously the AM Additional Address screen was displaying the following errors:
 - 1) When called from the Local List utility. This no longer occurs; upon entry to the screen all fields are blank.
 - 2) If coming from the Local List utility, the "Organization" field now holds 60 characters successfully. If the user enters a 60 character organization, the form does not error out.
 - 3) When the "Keep address information for next record" box was checked, the Suffix information was being saved from the previous record. This has been corrected so that the Suffix field is blank for a new record.
 - 4) The Middle Initial field was accepting numbers. This has been corrected so that only letters A-Z are accepted.

Add/Modify Allegations

- Previously, users were able to select allegations and save them without the required Last Alleged Date. This has been corrected so that if an allegation doesn't have a value in the Last Alleged Date field, it can not be selected and saved.

Add/Modify Benefits

- OFP has issued policy for how multiple workplace charges should be entered as a single benefit record. Users now are only able to enter a single workplace benefits instance for a charge. If a user tries to enter a second workplace policy benefit on a charge which already has one, a message will pop up informing them that there can only be one workplace benefit on a charge.

View/Modify Charge

- On the Respondent tab, you now have the option to sort the NAICS code list by either code or description. *Figure 6.*
- On the Respondent tab, the Census Web Site button now links to the 2007 NAICS codes.
- A new tab called Forms Log has been added. The Forms Log tab allows the user to view those forms and letters that have been generated for a charge. *Figure 7.*

Find Charge

- Additional search fields have been added. You can now search by CP Telephone (it will search home, work and cell phone for you), Process Type, Cause Finding Date range, and Charge Age range. Please note: All

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closed charges will have charge age as 0. *Figures 8 and 9.*

will not be checked if there is an active H7 (Deselected Class) or an active A3 (Charge consolidated with Lead Charge) on the charge.

Add/Modify Notes

- When adding a note, the staff will be that of the logged in user, not the staff assigned to the charge. So, when a supervisor enters a note, their name will display on that note.

Workload

- The system no longer hangs if you try to send more than 99 records to workload management unassigned.

Search CP

- After an unsuccessful search, all search criteria will be returned to the New Inquiry screen. Previously, only name and state were returned. *Figures 10 and 11.*

Charge Data Inquiry (CDI) Report

- On the Workload screen, Find Charge Results screen and Workload Management screen, you may only select no more than 50 charges to generate the CDI report.

Information Tab

- The “class case” checkbox will only be checked if there is an active H6 (Designated Class) on the charge. It

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Integrated Mission System - Private Sector Charge Management User Logon = (DBOWERS); Charge Owner = (Bowers, Debra)

IMS Utilities Help Window ORACLE

Add / Modify Action - (V 4.1.0)

Action

Action Date: 12/02/2010 Action Code: Z4 Charging Party: Lavender, Brenda J.

Action Group: Investigation (Mandatory) Serial Number: EEOC No.: 876-2011-00001C

Action Description: Z4 - Charge Deleted Function: Intake FEPA No.:

Reporting Office: Office of Information Technology (OIT) Unit: 1

Comments:

Attribute

Title	Value
Reason (D Or E)	Error
Duplicate Chg# (D Only)	

Action History

Action Date	Ser. No.	Action Code	Reporting Office	Fun	Un	Del	Created By	Create Date
11/08/2010	3	M2 - Settlement With Benefits	Office of Information Technology	I	1	<input type="checkbox"/>	DBOWERS	11/08/2010
11/08/2010	2	B6 - Assign Processing Category	Office of Information Technology	I	1	<input type="checkbox"/>	DBOWERS	11/08/2010
11/08/2010	1	AB - Formalize Charge	Office of Information Technology	I	1	<input type="checkbox"/>	DBOWERS	11/08/2010

Apply Next Done Cancel

Value
Record: 1/1 <OSC>

Figure 1

Integrated Management System (IMS)

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Catalog1 - Microsoft Word

File Edit View Insert Format Tools Table Window Help Letterhead AuthorLink Explorer EEOC Adobe PDF Acrobat Comments

Insert Word Field

EEOC Form 5 (11/09)

CHARGE OF DISCRIMINATION		Charge Presented To:	Agency(ies) Charge No(s):
This form is affected by the Privacy Act of 1974. See enclosed Privacy Act Statement and other information before completing this form.		<input checked="" type="checkbox"/> FEPA	110938A
		<input checked="" type="checkbox"/> EEOC	25A-2008-00512
Tennessee Human Rights Commission			and EEOC
State or local Agency, if any			
Name (indicate Mr., Ms., Mrs.)		Home Phone (Incl. Area Code)	Date of Birth
Ms. Gail L. Montgomery		(888) 888-8888	02-23-1957
Street Address		City, State and ZIP Code	
445 Bea Lane, Knoxville, TN 37922			
Named is the Employer, Labor Organization, Employment Agency, Apprenticeship Committee, or State or Local Government Agency That I Believe Discriminated Against Me or Others. (If more than two, list under PARTICULARS below.)			
Name		No. Employees, Members	Phone No. (Include Area Code)
TENNESSEE EDUCATION LOTTERY CORP.		101 - 200	(615) 324-6500
Street Address		City, State and ZIP Code	
200 Athens Way, Suite 200, Nashville, TN 37228			
Name		No. Employees, Members	Phone No. (Include Area Code)
Street Address		City, State and ZIP Code	
DISCRIMINATION BASED ON (Check appropriate box(es).)		DATE(S) DISCRIMINATION TOOK PLACE	
<input type="checkbox"/> RACE	<input type="checkbox"/> COLOR	<input checked="" type="checkbox"/> SEX	<input type="checkbox"/> RELIGION
<input type="checkbox"/> NATIONAL ORIGIN	<input type="checkbox"/> RETALIATION	<input checked="" type="checkbox"/> AGE	<input type="checkbox"/> DISABILITY
<input type="checkbox"/> GENETIC INFORMATION	<input type="checkbox"/> OTHER (Specify)	<input type="checkbox"/> CONTINUING ACTION	
		08-01-2007	11-06-2007
THE PARTICULARS ARE (If additional paper is needed, attach extra sheet(s)).			

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Figure 2

Integrated Management System (IMS) Private Application Release Memo December, 2010

Catalog1 - Microsoft Word

File Edit View Insert Format Tools Table Window Help Letterhead AuthorLink Explorer EEOC Adobe PDF Acrobat Comments

Insert Word Field

EEOC FORM 131 (1/09) **U.S. Equal Employment Opportunity Commission**

<p>MICHAELS STORES INC. #8834 7991 Eastchase Pkwy Montgomery, AL 36117</p>	<p>PERSON FILING CHARGE</p> <p style="text-align: center;">Brenda J. Lavender</p> <p>THIS PERSON (check one or both)</p> <p><input type="checkbox"/> Claims To Be Aggrieved</p> <p><input type="checkbox"/> Is Filing on Behalf of Other(s)</p> <p>EEOC CHARGE NO. 876-2011-00001</p>
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NOTICE OF CHARGE OF DISCRIMINATION
(See the enclosed for additional information)

This is notice that a charge of employment discrimination has been filed against your organization under:

Title VII of the Civil Rights Act (Title VII) The Equal Pay Act (EPA) The Americans with Disabilities Act (ADA)

The Age Discrimination in Employment Act (ADEA) The Genetic Information Nondiscrimination Act (GINA)

The boxes checked below apply to our handling of this charge:

1. No action is required by you at this time.
2. Please call the EEOC Representative listed below concerning the further handling of this charge.
3. Please provide by _____ a statement of your position on the issues covered by this charge, with copies of any supporting documentation to the EEOC Representative listed below. Your response will be placed in the file and considered as we investigate the charge. A prompt response to this request will make it easier to conclude our investigation.
4. Please respond fully by _____ to the enclosed request for information and send your response to the EEOC Representative listed below. Your response will be placed in the file and considered as we investigate the charge. A prompt response to this request will make it easier to conclude our investigation.
5. EEOC has a Mediation program that gives parties an opportunity to resolve the issues of a charge without extensive investigation or expenditure of resources. If you would like to participate, please say so on the enclosed form and respond by _____ to _____.

If you **DO NOT** wish to try Mediation, you must respond to any request(s) made above by the date(s) specified there.

For further inquiry on this matter, please use the charge number shown above. Your position statement, your response to our request for information, or any inquiry you may have should be directed to:

<p>Manuel Zurita, Director</p> <p><i>EEOC Representative</i></p> <p>Telephone: (813) 202-7905</p>	<p>Office of Information Technology (OIT) 131 M St, NE 4th Floor Washington, DC 20507 Fax: (202) 222-3333</p>
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Enclosure(s): Copy of Charge

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Figure 3

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AGREEMENT TO MEDIATE

CHARGE NUMBER: 876-2011-00001
FEPA NUMBER:

Charging Party: Brenda J. Lavender
Respondent: MICHAELS STORES INC. #8834

This is an agreement by the above parties to participate in mediation in the above referenced charge. The parties understand that mediation is a voluntary process, which may be terminated at any time. The parties and, if they desire, their representatives and/or attorneys, are invited to attend a mediation session. No one else may attend without the permission of the parties and the consent of the mediator(s).

The mediator(s) will not function as the representative of either party. However, the mediator(s) may assist the parties in crafting a settlement agreement. Each party acknowledges being advised to seek independent legal review prior to signing any settlement agreement. The parties acknowledge that they have received a copy of the Mediation Fact Sheet. The parties acknowledge that the mediator(s) possesses the discretion to terminate the mediation at any time if an impasse occurs or either party or the mediator deems the case inappropriate for mediation.

The parties acknowledge that participation in the scheduled mediation does not constitute an admission by either party of any wrongdoing or of a violation of the laws enforced by EEOC. Furthermore, the Charging Party acknowledges that participation in the scheduled mediation by the Respondent does not commit the Respondent to providing a monetary resolution of the matter.

The parties recognize that mediation is a confidential process and agree to abide by the terms of the attached Confidentiality Agreement. The parties acknowledge that if a settlement is reached as a result of the mediation, the assigned mediator(s) is required to report to EEOC any benefits received. This information is reported only for purposes of providing aggregate data to the EEOC for mediation program evaluation purposes, and the individual terms of the agreement will not be disclosed to the public.

Charging Party	Respondent
Brenda J. Lavender	MICHAELS STORES INC. #8834
Charging Party Printed Name	Respondent Printed Name
(222) 222-2222 / (333) 333-3333	(777) 777-7777 /
Charging Party Phone & Cell Phone	Respondent Phone & Cell Phone
Charging Party's Representative	Respondent's Representative
Greene K. Valerie	Joseph Gardner
CP Representative Printed Name	R Representative Printed Name
(888) 444-5555 / (333) 333-3333	(888) 921-3434 / (888) 234-5678
CP Representative Phone & Cell Phone	R Representative Phone & Cell Phone

Figure 4

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CONFIDENTIAL-DO NOT DISCLOSE
PCHP Assessment Form

Staff Name:	Debra R. Bowers	Date:	12/2/2010
Charge No.:	876-2011-00001	CP:	Lavender
R:	MICHAELS STORES INC. #8834		
Statute(s):	ADA		
Basis(es):	Alcoholism, Drug Addiction		
Issue(s):	Benefits	DOV:	09-08-2010

Category "A" Case Factors	Category "B" Case Factors	Category "C" Case Factors
<i>Request position statement or prepare RFI</i> <ul style="list-style-type: none"> <input type="checkbox"/> Documentation support <input type="checkbox"/> Strong witness support <input type="checkbox"/> Strong comparative data <input type="checkbox"/> Timing of events <input type="checkbox"/> CP credible <input type="checkbox"/> Multiple charges against the same R on the same issues <input type="checkbox"/> Plausible class impact <input type="checkbox"/> Facially discriminatory policy <input type="checkbox"/> Per Se violation (ADA) <input type="checkbox"/> Low use of CP's class on EEO-1 <input type="checkbox"/> Other: 	<i>Request position statement or prepare RFI</i> <ul style="list-style-type: none"> <input type="checkbox"/> Comparative data need clarification <input type="checkbox"/> Lack of support (documents/witnesses) <input type="checkbox"/> Further investigation required <input type="checkbox"/> Other: 	<i>Conduct FDI at intake. Note case log. No position statement or RFI</i> <ul style="list-style-type: none"> <input type="checkbox"/> Untimely filed <input type="checkbox"/> R not covered <input type="checkbox"/> Self-defeating charge <input type="checkbox"/> Failure to state a claim <input type="checkbox"/> CP not credible <input type="checkbox"/> CP to request NRTS or withdrawal <input type="checkbox"/> Other:

Justification for Assessment (attach additional pages if necessary):

Supervisor's Review	
Date:	Concur: <input type="checkbox"/> Do not concur: <input type="checkbox"/>
Name:	
New Category and Reason:	

Legal Review	
Date:	Concur: <input type="checkbox"/> Do not concur: <input type="checkbox"/>
Name:	
New Category and Reason:	

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Figure 5

Integrated Management System (IMS) Private Application Release Memo December, 2010

Integrated Mission System - Private Sector Charge Management User Logon = (DBOWERS); Charge Owner = (Bowers, Debra)

IMS Utilities Help Window ORACLE

IMS Search - (V 4.1.0)

Charge Processing Workload Management State and Local IMS Reports

Workload

Search Criteria Results (112)

Find Charge

New Inquiry

Forms / Letters

Exit

EEOC Number
FEPA Number
CP Last Name
CP First Name
CP Telephone
Investigator
Statute
Processing Category
Process Type
Communication Method
Closure Action

Receiving Office: Memphis District Office
Accountable Office
Lead Charge Number
NCC Incident Number
Respondent

From: 07/01/2009 To: 07/15/2009
Initial Inquiry Date
First Office Date
District Date
Cause Finding Date
Charge Age

Status
 Intake Open Closed All
 Include Deleted Charges

Clear All List Charges

EEOC Number
Record: 1/1 <OSC>

Figure 8

Integrated Mission System - Private Sector Charge Management User Logon = (DBOWERS); Charge Owner = (Bowers, Debra)

IMS Utilities Help Window ORACLE

IMS Search - (V 4.1.0)

Charge Processing Workload Management State and Local IMS Reports

Workload

Search Criteria Results (112)

Find Charge

New Inquiry

Forms / Letters

Charge Detail

Exit

EEOC Number	FEPA Number	Charging Party	Respondent	Investigator	Stat	CA	PC	Age	Del
<input checked="" type="checkbox"/> 490-2009-02295C		Brady, Anthony	ERNST & YOUNG	Lewis, Terry	O		B	519	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02296N		Swift, Emiece	FEDEX EXPRESS	Booker, Karen	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02297C		Willis, Charles E.	LENSCRAFTERS INC	Johnson, Brenda	O		B	519	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02298N		Johnson, Christine	HARDY BOTTLING	Toson, Margie	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02299N		Hall, Regi T.	PORTER LEATH	Toson, Margie	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02300C		Hubbard, Chester	CYC CONSTRUCTION INC	Bretches, Mark	C	M3	B	0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02301C		Thigpen, Edward C.	BAPTIST MEMORIAL HEALT	Toson, Margie	O		B	519	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02302N		Barnett, Cedric M.	CITY OF MEMPHIS (POLICE	Booker, Karen	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02303N		James, Paul	GOODYEAR TIRE COMPAN	Freeman, Elouise	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02304C		Glover, Harold O.	IBEW	Freeman, Elouise	O		B	519	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02305C		Newberry, Paula A.	ROMANO MACARONI GRILL	Lewis, Terry	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02306C		Judd, Samuel L.	NICKEY WAREHOUSE	Johnson, Dwight	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02307C		Wicks, Mary E.	ALLEGIANCE SECURITY GI	Mitchell, Jan	O		B	512	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02308C		Strawberry, Elayne	NEW GEN ORTHOTICS LAE	Lewis, Terry	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02309N		Robinson, Patricia	POPEYE'S CHICKEN	Johnson, Dwight	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02310C		Basemore, Terry D.	BASF	Blanks, Tyrone	O		B	491	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02311N		Wynn, Damien	RAINBOW NURSING HOME	Johnson, Dwight	C	XA		0	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02312C		Foster, Ahkim	NEW GEN ADVANCED ORT	Lewis, Terry	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02313C		Thomas, Jerry T.	WELLS LAMONT CORP	Johnson, Dwight	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02314C		Thompson, Felicia S.	DESOTO COUNTY SCHOO	Walker, Esther	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02315C		Lee, Frederick	CARGILL	Johnson, Dwight	O		B	514	<input type="checkbox"/>
<input type="checkbox"/> 490-2009-02316C		Campbell, Ben E.	EXEL LOGISTICS	Mitchell, Jan	O		B	514	<input type="checkbox"/>

Select All Deselect All View / Modify

Check to Select for Charge Detail Report
Record: 1/? <OSC>

Figure 9

Integrated Management System (IMS) Private Application Release Memo December, 2010

Integrated Mission System - Private Sector Charge Management User Logon = (MMEDINA); Charge Owner = (Medina, Maria)

IMS Utilities Help Window ORACLE

Search Charging Party - (V 4.1.0)

Search Charging Parties

Search Criteria

First Name

Last Name

Address

City

State

Zip Code

State
Record: 1/1 <OSC>

Figure 10

Integrated Mission System - Private Sector Charge Management User Logon = (MMEDINA); Charge Owner = (Medina, Maria)

IMS Utilities Help Window ORACLE

New Charge Inquiry - (V 4.1.0)

Charge Information

Receiving Office * Initial Inquiry Date * EEOC Number

Intake Staff * Intake Unit * FEPA Number

Charging Party

Keep charging party for next inquiry

Name Prefix Name Suffix

First Name Middle Initial

Last Name *

Address Line1

Address Line2

City

State Zip Code

Country

Email Address

Home Phone Cell Phone

Work Phone Extension

Fax Date Of Birth

Sex

Respondent

Keep respondent for next inquiry

Name

Address Line1

Address Line2

City

State Zip Code

County

Country

Phone Extension

Fax

Email Address

Institution Type

Employer Size

EEO-1 Headquarters

EEO-1 Unit

Other Actions

0 Records 0 Records 0 Records

Charging Party's First Name
Record: 1/1 <OSC>

Figure 11