

## Conditions for providing assistance

- UNISON seeks to provide members with the best possible advice and assistance. In the majority of cases our trained workplace stewards will be able to help. Should they need advice or have to refer your case to a more experienced UNISON representative then they will be able to do so using this completed Case Form. UNISON will determine who is the most appropriate representative to assist you in your case.
- At all times action taken on your behalf will be on the basis of an agreement reached with you about how UNISON can assist you. Throughout the procedure you will be kept informed and no decision will be made on your behalf without first consulting you. You are free not to accept the advice of your UNISON representative, in which case continuing support will be withdrawn. You should, however, note your right to complain or "appeal" against such a decision if you are dissatisfied, by writing to your branch secretary in the first instance.
- Should your steward feel that your case is one better referred to a more experienced or specialist official, then your steward, or any other UNISON representative supporting you (for example, a representative from a self-organised group) will still remain involved if you wish. However, UNISON representation is provided on the understanding that UNISON is your sole representative. If you are seeking advice from a third party, UNISON reserves the right to withdraw continued assistance to you.
- While UNISON is assisting you, you must remain a member. If you need more information about how to make payments, please contact your branch secretary who will be able to assist you.
- UNISON is proud of our record of achievements on behalf of our members. Publicising our successes both reminds employers of their responsibilities, and encourages more people to join UNISON. UNISON therefore reserves the right to use the details of your case and outcome in publicity or case study/learning material, although your name would only be used with your permission.
- UNISON representatives and members are expected to treat one another with respect and integrity. Failure to do so by a UNISON representative entitles you to make a complaint to your Branch Secretary. Failure to do so by yourself may lead to UNISON assistance being withdrawn from your case.



# CASEFORM

FOR MEMBERS STEWARDS BRANCHES & REGIONS



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# UNISON

FOR REGIONAL OFFICE USE ONLY





**10 Workplace representative's details** (i.e. person handling the case)

Membership Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Title	<input type="text"/>
First Name	<input type="text"/>		Mid Initial(s)	<input type="text"/>		Surname			
Address 1									
Address 2									
Town/City									
County									
Postcode			Position held in branch						

**11 Employer contact** - details of manager you have been dealing with

Name									
Address line 1									
Address line 2									
Town/City									
County									
Postcode			Telephone Number						

**12 Details of action taken**

If the member's complaint is a grievance matter, please confirm whether the member's complaint has been put in writing to the employer. If not, please explain the reason for not doing so. Otherwise please enter the date of the letter to the employer and attach a copy to this form.

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Date of letter ||

If the member has been disciplined by the employer, please confirm whether the member has lodged an appeal in writing to the employer. If not, please explain the reason for not doing so. Otherwise please enter the date of the letter to the employer and attach a copy to this form.

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Date of letter ||

**13 Details of further action taken**

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

**14 Branch details**

Branch Number/Code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Service Group	<input type="text"/>
Branch Name							
Address 1							
Address 2							
Town/City							
County							
Postcode				Telephone Number			

**15 Action taken by branch secretary and regional assistance required**

Please state what action you have taken on behalf of the member, what assistance is needed; give the dates of any forthcoming meetings or hearings. Please attach copies of any relevant correspondence.

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

**16 Branch secretary authorisation**

Name									
Signature					Date of branch secretary's signature				
.....					<input type="text"/> <input type="text"/> <input type="text"/>   <input type="text"/> <input type="text"/> <input type="text"/>   <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				

FILE NUMBER  FOR REGIONAL OFFICE USE ONLY

CASE TYPE  SUB TYPE

**To be returned to, and retained by, the member**

Your case has now been referred to the UNISON representative whose name and contact details are recorded below. Assistance will be provided in accordance with UNISON's scheme for representing members and the conditions outlined overleaf.

If, following your initial discussions, it is agreed that the representative will act on your behalf, any action will normally be done in consultation with yourself. Your representative should keep you routinely informed of any developments, and you should note short periods of non-communication may simply mean that your representative is waiting for someone (for example an employer, a witness) to respond to a letter or message. Please respect that most lay officers are doing a voluntary job in their own time. However, if necessary, please feel free to contact your representative to avoid undue stress to yourself.

The name of your UNISON representative is:

<input type="text"/>
<input type="text"/>

Contact details:  
work tel:

<input type="text"/>
----------------------

mobile:  
home tel:

<input type="text"/>
----------------------

email:  
address:

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

COMPLETE THIS SECTION - TEAR OFF HERE AND RETURN TO MEMBER