



Trade Union Representative Activity

Individual Case Record Form



One of these forms is to be commenced for every individual case you as the BDA Trade Union Representative deal with and used to track what activity has been carried out in relation to that case.

Submit the updated form at regular intervals to the BDA by emailing to [tucase@BDA.uk.com](mailto:tucase@BDA.uk.com).

This will enable the BDA Trade Union team to track how the case is progressing and provide you quick and relevant support when required. However just submitting this form is not in itself enough to get support.

## 1. Member being represented details

|  |  |  |  |
| --- | --- | --- | --- |
| **Members full name:** |  | | |
| **BDA Membership Number:** |  | |
| **Job Title:** |  | | |
| **Workplace:** |  | | |
| **Home Address:** |  | | |
|  | | |
|  | | |
|  | | |
| **Telephone numbers:** | **Work – Must be direct dial number:** |  | |
|  | **Mobile – Works:** |  | |
|  | **Mobile – Personal:** |  | |
|  | **Home number:** |  | |
| **Email addresses:** | **Work:** |  | |
|  | **NHS net:** |  | |
|  | **Personal – Non Work:** |  | |

## 2. Employer details

|  |  |  |
| --- | --- | --- |
| **Name of Employer** |  | |
| **Address:** |  | |
|  | |
|  | |
|  | |
|  | |
| **Telephone numbers:** | **Work:** |  |
|  | **Work other:** |  |
| **Email address:** |  | |

## 3. Human Resources Contact Details

|  |  |  |
| --- | --- | --- |
| **HR Contact** |  | |
| **Address:** |  | |
|  | |
|  | |
|  | |
|  | |
| **Telephone numbers:** | **Work – Must be direct dial number:** |  |
|  | **Mobile:** |  |
| **Email address:** |  | |

## 4. BDA Trade Union Representative Contact Details

|  |  |  |
| --- | --- | --- |
| **Representatives full name:** |  | |
| **Workplace:** |  | |
| **Workplace Address:** |  | |
|  | |
|  | |
|  | |
|  | |
| **Telephone numbers:** | **Work:** |  |
|  | **Mobile – Works:** |  |
|  | **Mobile – Personal:** |  |
|  | **Home number:** |  |
| **Email addresses:** | **Work:** |  |
|  | **NHS net:** |  |
|  | **Personal – Non work:** |  |

## 5. BDA Regional Representative Contact Details

|  |  |  |
| --- | --- | --- |
| **Representatives full name:** |  | |
| **Workplace:** |  | |
| **Workplace Address:** |  | |
|  | |
|  | |
|  | |
|  | |
| **Telephone numbers:** | **Work:** |  |
|  | **Mobile:** |  |
| **Email addresses:** | **Work:** |  |
|  | **NHS net:** |  |

## 6. BDA National Employment Relations Officer contacted details

|  |  |  |
| --- | --- | --- |
| **Full name:** |  | |
| **Address:** |  | |
|  | |
|  | |
|  | |
|  | |
| **Telephone numbers:** | **Work – Direct dial number:** |  |
|  | **Work Other:** |  |
|  | **Mobile:** |  |
| **Email addresses:** |  | |

## 7. Important dates

Consider the nature of the issue and if it is likely to be a case that could possibly go to Employment Tribunal. In such cases there is a time limit of 3 months less 1 day from the date of the incident (No. 1 below) to register a tribunal case (No. 9 below). So you must in such cases contact directly a BDA National Employment Relations Officer who deal with such cases. Submission of this form is not enough.

|  |  |  |
| --- | --- | --- |
| **No.** | **Item** | **Date in Full** |
| **1** | **Date incident occurred:** |  |
| **2** | **Date Rep contacted by Member:** |  |
| **3** | **Date Rep met with member:** |  |
| **4** | **Date grievance submitted:** |  |
| **5** | **Date of First meeting:** |  |
| **6** | **Date of Hearing:** |  |
| **7** | **Date of appeal:** |  |
| **8** | **Date contacted BDA N.E.R.O** |  |
| **9** | **Date by which ET1 is to be lodged** |  |
| **10** | **Date registered for ACAS Early Conciliation** | To be actioned by BDA Trade Union National Employment Relations Officer |
| **11** | **Date ET1 Lodged** | To be actioned by BDA Trade Union National Employment Relations Officer |

## 8. Details of the case

Please include here a description of what the issue is including any important or relevant dates or reference to any important or relevant documents:

|  |
| --- |
|  |

## 9. List any relevant documents of evidence or communications

|  |  |
| --- | --- |
| **No.** | **Document** |
| **1** |  |
| **2** |  |
| **3** |  |
| **4** |  |
| **5** |  |
| **6** |  |
| **7** |  |
| **8** |  |
| **9** |  |
| **10** |  |

## 10. Record of actions

Please record chronologically and if relevant include time all actions that have been taken in relation to the case.

|  |  |  |
| --- | --- | --- |
| **No.** | **Date / Time** | **Action** |
| **1** |  |  |
| **2** |  |  |
| **3** |  |  |
| **4** |  |  |
| **5** |  |  |
| **6** |  |  |
| **7** |  |  |
| **8** |  |  |
| **9** |  |  |
| **10** |  |  |

## 11. Any miscellaneous information

Please report here any relevant miscellaneous information or details in relation to this case that are not specifically required in the preceding sections.

|  |
| --- |
|  |

# Save the update

# Now send a copy to the BDA Trade Union Team

# Do you now need to contact a

# BDA National Employment Relations Officer?

