

10/04/2010



## Customer Service Agreement

To: IRS Chapter Presidents

Re: Customer Service Agreement

Recently, NTEU and the IRS have resolved all outstanding issues, and are ready to sign a new Customer Service Agreement (CSA). As many of you are aware, the parties have been bargaining over a successor agreement to the 1999 Customer Service Agreement for over three years. NTEU remained steadfast in fighting to maintain some of the benefits that bargaining unit employees received under the 1999 Customer Service Agreement, and prevailed. At this time, I would like to thank the NTEU bargaining team members who dedicated years of time and service in helping us reach this new agreement, which will continue to protect bargaining unit employees from the rigors and demands of the call site environment: Mary Wright, President of Chapter 32 (IRS Colorado); Duncan Giles, President of Chapter 49 (IRS Indiana); Jacqueline Huff, President of Chapter 73 (IRS Cincinnati Service Center); Ronald Carbonneau, former president of Chapter 68 (IRS Andover Service Center); Owen Smith, President of Chapter 66 (IRS Kansas City Service Center); Fran Troutman, President of Chapter 99 (IRS Brookhaven Service Center); National Executive Vice President Frank Ferris; and Raven Hall, National Negotiator.

Please find below a brief summary of the major changes or clarifications in the new agreement:

**Scope.** Relevant parts of the new CSA will apply to all bargaining unit employees assigned to Accounts Management (AM) and Compliance Services in Wage and Investment Division (W&I) and all bargaining unit employees assigned to Compliance Service in the Small Business/Self-Employed (SB/SE).

**Voluntary Permanent Changes to Tours Of Duty (TODs).** Bargaining unit employees will have the opportunity to permanently change their TODs on an annual basis. This will offer unit employees more flexibility in changing their tours in an ever-changing call site environment.

**Read and Meeting Time** - Bargaining unit employees will maintain their sixty minutes of both read and meeting per week, and may request the time in fifteen minute increments as opposed to the thirty minute blocks. Also, the parties have outlined a process in which bargaining unit employees can request additional reading time if the sixty minutes is not sufficient. Please note that either read or meeting time can be shortened or canceled for groups of employees (in no event can anyone employee's read/meeting time be cancelled under this agreement) if there is no material available. This provision was added to address the concern that certain groups of employees may not need sixty minutes of read time a week, and therefore, these employees time could be cancelled in order to provide other groups with additional time. Furthermore, to effectively monitor the use and demand of read time across occupations, the Agency will establish a separate OFP for recording and tracking the use of read time and meeting on Form 3081.

**Annual Leave** - The parties developed a four-tier leave system to address concerns about unit employees being able to actually use their annual leave for specific events. Under this new leave system, there are four ways in which annual leave can be granted:

**Type 1:** Employees who would like to take three to ten consecutive days of annual leave for "life events" such as weddings, graduations, births, etc. The solicitation and approval periods for this type of leave will take place before the upcoming calendar year so employees will know well in advance if their leave has been approved for the purpose of making travel and other arrangements. Leave requests will be granted based upon both accrued and projected leave balances, compensatory time and/or credit hours.

**Type 2:** This allows employees to request consecutive days off up to two consecutive weeks each year for any purpose. The solicitation and approval periods for this type of leave will also take place before the upcoming calendar year. Please note that management should be approving consecutive days/weeks without any breaks – i.e., management should not be approving Monday through Friday, if it wants to the employee to return to work on a Wednesday during that week. These leave requests will also be granted based upon both accrued and projected leave balances, compensatory time and/or credit hours.

**Type 3:** This is commonly referred to as "Planning Period" leave at most sites, and will continue to be solicited and approved three times a year with minimal changes except for solicitation and approval dates.

**Type 4:** This type of leave allows employees to request fifteen minutes to one full workday of leave off for personal business or other events that cannot be foreseen during the solicitation period. This will be approved on a first come, first served basis.

**Sign On/Sign Off.** Employees will not be expected to arrive early to sign onto VOIP or ASPECT. Employees should sign on at the beginning of their TODs. Once the sign-on process is completed (management recognizes that there could be a delay in this process due to booting up the computer and other system issues), then the employees should start taking calls.

Additionally, within six months of this agreement becoming effective, management will implement an automated time tracking system that will capture ASPECT time and transfer the data to Form 3081. Under this new system, employees will be given eighteen minutes total at the beginning and end of their shift to complete Form 3081, and conduct end-of-the day activities. Furthermore, employees will be given 5% of his/her direct time (i.e., commonly referred to as "slippage") as an OFP code on Form 3081.

**Auto-Available** - Auto available will be implemented as a pilot for six months at the Austin Campus, Dallas Call Site, Denver Call Site, Ogden Campus, Atlanta Campus and Jacksonville Call Site. Thereafter, the Agency will continue with rollout if it determines that use of autoavailable increases productivity than using auto-wrap. However, auto-available software will be modified so that an employee can hit a button at any time during a call to be placed in auto-wrap after each call. Consequently, this is a manual wrap system rather than auto-wrap.

More information with respect to these changes are forthcoming, but in the meantime, I encourage you all to read the agreement in its entirety, and if you have any questions, please let JACKIE HUFF know and they will all be forwarded up to national office.

Colleen M. Kelley  
National President