

THE FORCE



A Publication of NTEU Chapter 73



March 2024

Tax Compliance

It is again that time of the year. As IRS employees, we are required to timely file our taxes every year. After all, since we collect taxes, we should be required to file and pay our personal federal and state taxes timely. We do this to protect our job, but this also protects the integrity of the Internal Revenue Service. Even if you expect a refund, you should still file timely.

How can you prove you filed a timely return? Most people now file an electronic return using a tax site. After filing your return, print the return and the confirmation number that says the return was sent. Two or three days later, the IRS website should tell you that your return was received. Print the screen saying that IRS received the return, and save it for your records. As long as you have proof of filing, you should not have a tax compliance issue later.

An exam audit or an under-reporter's audit could happen one or two years after the filing of the original return. If this happens, don't think that this is only your business and that your manager does not need to know about it. Report it to your manager as soon as you get a letter about an additional assessment because if you receive notification of an additional assessment, you can bet that management has already been notified or will soon be notified. Do not hesitate to let management aware of the letter or notification you received. It is better to notify management of the potential additional liability, than have management find out without you letting them know. The difference between the two can often lead to a mere admonishment versus your removal from service.

This is a serious violation. Many employees are disciplined up to termination for tax return issues every year, so be sure to file and tell management if you have any filing or payment issues. If you are under a payment plan agreement, this is not considered compliant according to our responsibilities to file and pay timely. It is, however, management's responsibility to prove that you willfully intended to make the mistake on your return.

Janet Colwell

NAME CHANGE REQUEST

1. Your name **MUST** be changed in:
 - HR Connect
 - Discovery Directory
 - E-mail (You must submit an ERC ticket for this to be changed)
2. Fill out Form 13716 and turn it in to the badge room. (Mail Stop 622)
3. Once the name change request has been processed you will receive an e-mail stating you can schedule an appointment to come re-enroll. The e-mail will be from AWSS Smart ID, and it may go to your junk folder. Please read **ALL** of the instructions of this e-mail as it will give you details on what specific items you need to bring with you.
4. Members will still need to send the name change request to Shannon Lovins. <Shannon.K.Lovins@irs.gov>

Monthly Insider

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NTEU Chapter 73

- Gateway Office -

859-320-3617

- Annex Kentucky Drive -

859-869-5293

- Facebook -

www.facebook.com/nteu73

- Chapter Web Site -

www.nteu73.org

- Twitter -

www.twitter.com/nteu73

- Email -

ctr.cov.cirsc.nteu.73.covington@irs.gov



NTEU 73 Events

- Coffee & Donuts -

Annex Kentucky Drive - March 26th, 2024

Gateway Center - March 27th, 2024

- NTEU Steward National Training -

May 5th - May 7th 2024

- Memorial Day @ Stickers Grove -

May 25th, 2024

- Labor Recognition Week -

September 16th - 20th 2024

- NTEU Toy Drive -

November 1st, 2024 - December 1st, 2024

- NTEU Holiday Party -

December 14th, 2024



Stewards Corner

President: Debbie Mullikin

Vice President: Shannon Lovins

Day Shift Chief Steward: Angela Moore

Day Shift Full Time Stewards: Jacob Bross, Diane Gallina, Loretha Hudson, Rachel Lovins, Ericka Raleigh, Brandi Riggs

Treasurer/Day Shift Full Time Steward: Janet Colwell

Day Shift Part Time Stewards: Rasheda Harris-Bates, Brandy Belew, Shonda Collins, Amanda Gerding, Nicole Guethlien, Suzanne Jackson, Tonya Morris, Kendra Stevenson, Jennifer Smith, Luke Terhaar

Swing Shift Chief Steward: Alex Walker

Swing Shift Part Time Steward: Maureen Cruse, Charolette Hill, Chad Rosen, Erinn Sweeney



NTEU Working 4U!

Rachel Lovins - Was able to get 14 day suspension taken down to a letter of reprimand.

Angela Moore - Was able to get a EVAL raised and Telework reinstated for an employee.

Jacob Bross - Was able to get 17 hours AWOL removed.

Diane Gallina - Was able to get a EVAL raised to all 5's after being incorrectly lowered and get AWOL changed to LWOP informally with management.

Ericka Raleigh - Was able to resolve two Reasonable Accommodation's with management grievances with management informally.



Frontline IRS Employees Not Covered by Treasury Telework Directive.

Today you received a message from the Department of the Treasury about its plan to reduce telework across the Department in response to guidance from the Office of Management and Budget. We want to make sure you have accurate information about who is and isn't affected by this plan.

NTEU-represented employees are protected by the NTEU-IRS Contract and are not impacted by today's announcement.

Any telework agreement you have in place must be followed and we stand ready to enforce your rights under Article 50 of your contract if any efforts are made to extend the plan to bargaining unit employees.

In response to the Treasury Directive, IRS Commissioner Werfel discussed this directive with National President Doreen Greenwald and acknowledged that the directive requires it be applied consistent with the NTEU-IRS contract. He emphasized that the only IRS employees who will see changes to their telework schedules are non-bargaining unit employees in the greater Washington, D.C., area.

NTEU vehemently opposes this change and will fight any potential future attempts to reduce telework for bargaining unit employees. Telework is a proven program with significant benefits that include strong productivity, increased employee engagement and satisfaction, reduced commuting time and the subsequent environmental benefits. Additionally, it increases recruitment, can decrease costs for real estate and helps improve retention. Telework has been a successful workplace policy for years and should be embraced and encouraged by agencies. This directive is a step in the wrong direction.

Instead of embracing the many benefits that telework provides, the Treasury directive doubles down on unwise guidance from the Office of Management and Budget (OMB) that seeks to drive employees back to the office absent any compelling data or reasons for doing so. We are not going to let arbitrary percentages dictate our members' abilities to avail themselves of the hard-fought rights we have won.

Having a strong contract that protects your rights is a crucial benefit of NTEU membership. We will keep you updated on any developments.

We celebrate the women who refused to stop fighting.



Schomburg Center for Research in Black Culture, Photographs and Prints Division, The New York Public Library

Vote.org

NTEU.org



NTEU
National Treasury Employees Union

Admin Time and Voting

As a friendly reminder per Article 36 Section 2 of the 2022 National Agreement and *Executive Order 14019 - Promoting Access to Voting*, you are allowed up to four (4) hours of administrative leave for voting purposes. You are allowed to use this time for early voting or on the day of the election. Executive Order 14019 - Promoting Access to Voting was released on March 7, 2021 and does not require any calculations regarding the polls and TOD (Tour of Duty), it simply allows employees to take up to 4 hours of admin to travel to/from polls and vote. If management attempts to use calculations or denies your Administrative Leave for voting contact NTEU73 at ctr.cov.cirsc.nteu.73.covington@irs.gov immediately.

Primary Election Dates



- Indiana -

May 7th, 2024

- Kentucky -

May 21st, 2024

- Ohio -

March 19th, 2024

Administrative Leave – Voting – 990-59567 – Post in 15-minute increments the amount of administrative leave needed and approved (not to exceed four hours per election event) to vote on federal election day; to vote in federal, state, local, tribal, and territorial election events (including primaries and caucuses that do not coincide with a federal general election day); and to vote in federal special congressional elections not held on the date of a federal general election. This administrative leave is also available for early voting.

NTEU 2024 Legislative Conference



1. **Sign-on Process** – You are not expected to answer calls at the very start of your tour of duty. Only after the sign-on process to the system is completed, should you begin answering calls. [Part II Sec. 1 C]
2. **Read Time** – You are entitled to 60 minutes of weekly read time to stay current on IRM, new laws, etc. [Part I Subsection 2.B.2]
 - a. If your read time is cancelled, you are insulated from any mistakes you may make. [Part I Subsection 2.D]
 - b. If your read time is shortened or cancelled, it is to be made up generally within two weeks (with the exception of the April 1-15 moratorium period). [Part I Subsection 2.B].
 - c. While management has the right to assign topics for read time, the assignment should not take time away time needed for updates, etc.
3. **No Black Out Dates** – The IRS agreed not to have blackout dates for requesting annual leave prior to the initial approval period but can consider workload, telephone schedules and/or projected customer demand. [Part I Subsection 3.B.4] Also, you have the option of requesting ad hoc annual leave for personal business or other events that cannot be foreseen or planned during the prearranged leave solicitation planning periods. [Part I Subsection 3.G.]
4. **Leave Swap** – While your leave is granted based on IRS EOD, you may swap annual leave dates with another employee within the same leave pool. [Part I Subsections 3.B.5 and 3.C].
5. **Eighteen-Minute Grace Period** – You are allocated 18 minutes per day for beginning and end of shift activities, in addition to time for reviewing the accuracy of your time in the automated time tracking system. [Part II Subsections 1.B.1 and 1.E.5]
6. **Slippage** – You do not need prior supervisory approval to use the OFP code for slippage to reconcile time not reported by the automated time tracking system up to 5 percent of your direct time. This 5 percent slippage does not include items for which there is a separate OPF code. [Part II Subsection 1.E.6]

Tip: Direct time does not include any leave you may have taken that day.
7. **Utilize the Right Idle Codes** – You are allowed to use the Temporarily Off the Telephone code if you need a short breather between calls. You do not need preapproval to use the Stress Break Time code if you are unavailable to take a call because of a stressful situation.

Tip: Although the Stress Break Time code doesn't require preapproval, it may be good practice to inform your manager when returning for exception purposes. This is for a stressful situation, not just a stressful call, and can include a manager speaking loudly enough for coworkers to hear, receiving a bad review, etc. However, it should not be used to extend your break or lunch, taken at the beginning of your tour, or taken the same time every day. It also shouldn't last an hour or so.
8. **Dropped Calls** – You should not be penalized if a taxpayer's call is dropped and a new taxpayer is automatically connected if you follow national and local telephone procedures. [Part II Subsection 4.C.3]
9. **Meeting Time** – Recurring meetings should focus on clarifying technical and procedural items. Postponed meeting times must be rescheduled within two weeks. The duration is dictated by the local agreement and can be an hour. These meetings should not be used for training purposes, but rather to reinforce and clarify technical and procedural items. [Part I Subsection 2.E.1-3]
10. **Automated Tracking System** – The system cannot be used to monitor time and attendance issues. For example, if a manager wants to discipline an employee for tardiness, it must be observed. [Part II Subsection 1.E.2]

Career Benefits

How to Navigate Benefits in Your New Career

When you begin a new career, you have several decisions that need to be made regarding your benefit. Oftentimes, these decisions can have a huge impact on your future. In this post, we'll discuss various benefits options and how to position yourself for a successful future.

Whether you are just starting or have a few years under your belt, this article will be a great refresher on coverage gaps, short-term disability, life insurance, and planning for retirement.

Tips for New Employees from Retirees

1. **Insure your paycheck.** Accidents happen, and supplemental insurance can ensure that your paycheck is protected in case you have to miss work.
2. **Make your life insurance decisions EARLY.** The younger you are, the cheaper life insurance will be. Protecting your family in the event you pass away unexpectedly can be done in an efficient manner.
3. **Start investing in your TSP as soon as possible** – today is the best day to start. Take advantage of the power of compound interest and time to multiply your savings.
4. **Choose your TSP funds wisely.** Diversify your investments and invest in more aggressive funds when you have time to ride out the changes and invest in less risky funds when you are closer to retirement.

Contribute what you can afford into your TSP – paying yourself first will pay off when it comes to retirement. You'll be able to have a stable, solid income when you

From Hired to Retired: Your Federal Career Roadmap



How to Navigate
Your Benefits in
Your New Career



UNITED
BENEFITS

+



RETIREMENT COUNSELING AND BENEFITS ENROLLMENT

IN-PERSON APPOINTMENTS ARE AVAILABLE

Come by or set up an appointment for guidance on the following topics:

RETIREMENT

- Assisting with Retirement Paperwork
- TSP & 401(k) Strategies
- Survivor Annuity Options
- Calculating Your Pension
- Social Security Strategy
- Early, Deferred, & Disability Retirement
- FERS Retirement
- FERS LEO Retirement

SUPPLEMENTAL BENEFITS

- Short-Term Disability
- Hospital Indemnity
- Critical Illness
- Dental & Vision Insurance
- Permanent Life Insurance for Employees & Family

ONE-ON-ONE APPOINTMENTS



Schedule your free one-on-one
benefits review by scanning the
QR code or visiting us at

unitedbenefits.com/christopherlee/

YOUR LOCAL BENEFITS SPECIALISTS

ALLY KING

C: 931-626-0037
ally.king@unitedbenefits.com

CHRISTOPHER LEE

C: 256-740-2166
chris@unitedbenefits.com

PAUL THORNTON

C: 423-309-2768
paul@unitedbenefits.com