



The U.S. House of Representatives COMMITTEE ON APPROPRIATIONS



House Appropriations Committee Approves FY 2018 Funding Bill with Cuts to IRS

Last week, the House Appropriations Committee approved the FY 2018 Financial Services and General Government (FSGG) spending bill with cuts to the IRS by a vote of 31-21. The full committee made changes to the subcommittee-approved bill, which would provide the IRS with a total of \$11.085 billion for FY 2018, \$149 million less than the current FY 2017 enacted level. In particular, the bill would reduce funding for both IRS taxpayer service and enforcement by \$50 million and business systems modernization by \$180 million. Most disappointing was the omission of \$290 million in targeted funding to improve the phone level of service that was provided to the IRS in FY 2016 and FY 2017. This critical funding allowed the IRS to drastically reduce taxpayer phone wait times during the last two filing seasons and raise the level of service from 38 percent during the 2015 filing season to 72 percent during the 2016 filing season and to 79 percent during the 2017 filing season. NTEU knows the lack of sufficient funding provided in the bill for the IRS will further impair their already degraded ability to carry out their missions of assisting taxpayers and enforcing our nation's tax laws. That is why in advance of committee action, NTEU sent a letter to every member of the committee

urging them to oppose the cuts to the IRS's budget contained in the bill, and to provide sufficient funding for the agency in FY 2018. In the coming days and weeks, NTEU will continue to make clear that the level of funding provided to the IRS in the bill is completely inadequate, and will continue to press Congress to provide the agency with the resources necessary to accomplish its mission.



Thank you for joining us for the Telephone Town Hall! It was designed to discuss pending threats to pay and retirement. We loved hearing your voices and will do it again!

This Month's Highlights!

- FY 2018 Funding Bill
- Telephone Town Hall
- OT Approved For TAS
- Tips For Seasonal Employees
- TAS Inventory Management
- \$22 Million Dollar Employee
- Labor Recognition's Coming!
- Federal Employee Pension Act



Chapter 14 • St. Louis, Missouri



Overtime Approved for TAS Employees

The Taxpayer Advocate Service (TAS) notified NTEU that overtime will be made available for TAS Revenue Agent Technical Advisors (RATAs) and Revenue Officer Technical Advisors (ROTAs) from July 16 through August 19, 2016. Each RATA and ROTA is eligible for up to eight hours of overtime per pay period. This overtime is in addition to the overtime for Case Advocates and Lead Case Advocates that was the subject of a May 30, 2017 chapter presidents' memo and the overtime for Account Technical Advisors that was the subject of a June 5, 2017 chapter presidents' memo. NTEU requested a briefing with TAS management regarding the inconsistent granting of overtime to various TAS employees, and we believe this new grant of overtime is a direct result of our advocacy. When Case Advocates process more cases, other TAS employees have more work, and this new grant of overtime was extremely necessary.

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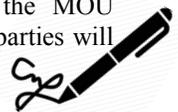
TAXPAYER ADVOCATE SERVICE

Agreement Reached: TAS Inventory Management Alignment

NTEU signed a Memorandum of Understanding (MOU) with the Taxpayer Advocate Service (TAS) on its Inventory Management Alignment (IMA) Initiative. This initiative seeks to refine inventory management to address nationwide disparities in the inventories of Case Advocates and to allow Case Advocates to work cases within their home states and time zones. The initiative had its genesis in a 2011 pilot program under which cases were assigned geographically to Case Advocates by zip code. According to TAS, the pilot was successful in that it eliminated point of contact assignment of inventory and distributed work nationally based on taxpayer demand. Under the IMA Initiative, the 2011 pilot program on zip code routing will be rolled out to all offices. Once it is determined that a case meets TAS criteria, it will be entered into TAMIS. Transfer guidelines will be applied, and then the case will be transferred using zip code routing. If, after the transfer guidelines and zip code routing are applied, an office still has higher than desirable inventory and that high inventory is due to a temporary situation (e.g., a staff person in a small office taking leave),

national work load balancing (N-WLB) or subsequent rounds of zip code routing will be applied. Two previous MOUs between NTEU and the IRS will be retired under this new MOU. The February 23, 2011 MOU regarding the ZIP Code Routing Pilot will be retired because the pilot will be rolled out to all offices. The October 8, 2009 MOU regarding TAS Inventory Balancing will be retired because its requirements will be replaced by the new MOU's inventory balancing processes. The IMA Initiative was first noticed to NTEU in November of 2015, and the NTEU team has spent many hours over the last 18 months in telephonic meetings, on e-mail exchanges, and in face-to-face bargaining in Washington, D.C. Uneven distribution of inventory in TAS is a systemic issue of high importance to all TAS bargaining unit employees, and management's proposals were, for months, vague statements that would have no real effect. The NTEU team clarified the issues, made proposals, and finally reached agreement on a strong MOU that will provide protections to employees as the IMA is implemented. The IRS will provide data

used to monitor zip code routing to NTEU for the first two years of this initiative. NTEU and the IRS will meet periodically to discuss this data and any other issues that arise because of this new process. There will be no changes to bargaining unit employees' tours of duty, alternate work schedules, posts of duty, or telework arrangements. In addition, NTEU made a proposal that would require TAS to extend applicable timeliness deadlines and assign fewer cases to those Case Advocates and Bilingual Case Advocates who have inventory levels that are ten percent (10%) or more above the national inventory average at any time. In response, the IRS declared that the proposal was nonnegotiable. In the interests of implementing the remaining inventory balancing procedures contained in the MOU, NTEU agreed to sever this proposal and will file a negotiability petition with the Federal Labor Relations Authority (FLRA) to seek a ruling that it constitutes a negotiable appropriate arrangement or procedure. If the FLRA agrees with NTEU that this provision is negotiable, the MOU will be reopened and the parties will have to bargain.



helpful tips



If you are a newly-hired seasonal or seasoned-seasonal employee subject to furlough, here are some important tips to remember while in non-pay status so you stay on track:



Change of address: If you move while in non-pay status, update your address of record through the Employee Personal Page (EPP) and notify your manager immediately. For additional information on changing your address, visit the ERC.

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helpful tips

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Unemployment Compensation: You may be entitled to unemployment compensation benefits while in non-pay status. This program is under the jurisdiction of your state. It can take up to three weeks from the date of your furlough for your state to receive the information. You may use your Statements of Earnings and Leave from the EPP to validate your wages. Remember to stop your unemployment benefits when you return to work.

Debt Repayment: If you're under a repayment agreement for employee debt, such as past Federal Employees Health Benefits premiums or a salary overpayment, you need to submit your payments timely according to your repayment agreement. If you don't make payments on time, your debt will become delinquent, and the IRS will start collection actions. You can remit your payments electronically using Paygov or send them directly to the National Finance Center:

USDA/National Finance Center, PO Box 79042 St. Louis, MO 63179-0342



Thrift Savings Plan (TSP) Loan Repayment: If you have an outstanding TSP loan, you'll receive notification from TSP requesting payment, or you can call the ERC (866-743-5848, option 1) and request to have a TSP-41 sent to the TSP office to suspend your loan payments. When you return to duty, you'll need to contact the ERC to have your payments restarted; otherwise your loan could go into default. Document 12686, Responsibilities of Seasonal Employees, provides additional information to consider when you're in non-pay status. And remember, please read and respond accordingly to all mail from the IRS. If you need further guidance, call the ERC: 866-743-5748, option 1.



did you know?



A \$22 Million Dollar Retired Federal Employee?

Who has been the most successful stock market investor as an active or retired federal employee? We do not really know. The Thrift Savings Plan does not publish names and financial results of its investors for obvious reasons. We do know that one federal employee has accumulated more than \$5 million in the TSP. We do not know if this person has spent a career as a federal employee or if he (or she) transferred money into the TSP from a private sector account. But, in determining the most successful career federal employee as a stock market investor, one name always stands out as being near the top of any list: Anne Scheiber.

Former IRS Auditor Dies With \$22 Million Estate

Miss Scheiber was raised by her mother as her father died when she was very young. She started working at jobs as a teenager and managed to graduate from college and from law school and subsequently elected to

work for the Internal Revenue Service (IRS). Miss Scheiber worked for the IRS as an auditor. She never married and had very few, if any, real friends. Her top salary at the IRS was \$3,150 per year.

She retired from the IRS in 1944 with a government pension of \$3,100. She had saved \$5,000 when she retired at 51 years old. She apparently had invested in the stock market while working for the federal government and had started investing some of her money while she still worked for the agency. She never received a promotion although she was apparently a very good worker. Being female and Jewish may have been significant factors in her lack of career advancement in the agency in that era. After she retired, her pension was apparently enough for her to live on. She never held another job and rarely left her apartment.



When she died at 101, she still lived in the same apartment, wore the same clothes, and left \$22 million dollars to Yeshiva University. She reportedly left the money to Yeshiva to help Jewish women battle the kind of discrimination she felt she had encountered during 23 years with the IRS.

— Courtesy of Ralph R. Smith of FedSmith.com



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Pictured: Representative Anthony Brown (D-MD-4)



Were you hired during 2013 or after? Recently, Representative Anthony Brown (D-MD-4) has introduced H.R. 3269, the Federal Employee Pension Act; a bill to repeal the increased FERS contributions for employees hired in 2013 and beyond. This legislation would return most federal employee contributions to the original 0.8%, from

Federal Employee Pension Act

the recent hike up to 4.4%. You will recall that NTEU objected to those pension increases at the time, and we continue to object to any and all proposals that seek to increase FERS employee contributions. Former Congresswoman Donna Edwards introduced this NTEU-supported bill in past congresses. NTEU is pleased that Congressman Brown is championing this bill, particularly at a time when others are seeking to move in the opposite direction. Federal employees have already contributed \$182 billion to deficit reduction; more than their fair share. Passage of this legislation would at least remove the increased contribution burden from our newer employees, restore their take-home pay, and help in agency recruitment efforts.

Chapter 14 Welcomes NTEU National President

Tony Reardon!

SAVE THE DATE

August 31st, 2017—Sessions are: 10am, 11:30am & 1:30pm



Celebrate with Us!
Thursday—August 31st, 2017
Robert A. Young Federal Building Auditorium



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