

DFAS and AFGE Council 171  
Negotiation Session  
May 27, 2004

In attendance: Bob McNamara, Kelley Dull, Pete Heins, Teresa Briley, Mark Collins, Frank Gootee, Frank Rock, Robin Smith, Ron Coe and Victor Davis.  
Note takers: Joe Dan Rawls and Angela Beltowski.

Kelley: I wanted to mention the whole issue of EDM; we found out that Dayton is not going great. They are having major work issues, mandatory overtime etc.

Continue with CLC:

Language: DFAS is committed to supporting Growth and Learning and encourages employees to participate in e-learning opportunities during duty hours.

Kelley: I would like something about the carrels and desks.

Add: This training could be accomplished at their workstations or the e-learning carrels.

Teresa: Frank wanted to add something like 'e-learning that is available through the e-learning center.'

After 'opportunities available through the DFAS e-learning center.'

Complete language: DFAS is committed to supporting Growth and Learning and encourages employees to participate in e-learning opportunities available through the DFAS e-learning center during duty hours. This training can be accomplished at their workstations or the e-learning carrels.

Agreed to by all.

Number 9:

Teresa: why can't we put something about the local presidents will be provided upon request.

Kelley: Upon request, through the proper channels, the local president will be provided...

Teresa: What do you want with this? There currently isn't a report like this.

Frank G: If it's a regional course we would know. College courses would be local and so would local training.

Ron: Can you tell us what tracking you do have?

Frank G: The centrally funded training classes. We get sign in sheets from those. This will be available soon on the e-portal. Anything other than that is a local classroom manager decision.

Ron: I don't think we want every class that's given. I think we are wanting more on the e-learning.

Frank G: E-learning is up to the Vendor to supply on usage.

Kelley: But part of the contract wouldn't you been getting that kind of report?

Frank G: Don't know if it would be broken down to the site level that would benefit the local president. Netg does get a monthly report but I'm not sure about the others.

Bob: So we haven't developed the reports yet?

Frank G: The reports would be available from the Vendors if we request them.

Kelley: We wouldn't be concerned as much as about research and books looked at. We want information about the courses taken that the employees are getting credit for.

Frank G: Number of courses completed.

Frank R: Can we say there is a classroom manager at each site?

Frank G: Yes. This is the person we send the list of classes to for scheduling.

Language: Upon request, local presidents

Kelley: what is 'may' and 'according to the statute'?

Teresa: We can't be made to provide reports that don't exist.

Bob: You recognize that if we don't have it we don't have it but if we do have it we'll provide it.

Victor: Some type of report must be available because of the information that was used to make the changes to the CLC's. Who makes the decision of what vendors are used?

Frank G: There is a contracting process.

Frank R: There are more learning courses than Netg. What avenues the employees have and what options they might take.

Kelley: When an employee completes a course is a certificate printed?

Frank G: The system generates one that can be printed at the completion of the course.

Pete: The training that is available is listed on the e-portal.

Frank G: there's Netg, net library, periodicals, FMN – used for CPE's

Frank R: Does it explain that they can be used as CPE's?

Frank G: Most of the courses in the E-Gov are also in Netg.

Kelley: Maybe we can use this as a marketing tool.

Kelley: Netg shows that classes are only started but are completed in the training history.

Pete: What is the source of data for the training history?

Frank G: The learner history is the actual history of the training.

Teresa: Upon request the Union will be provided the available e-learning usage data.

Language to replace 9: Upon request the Union will be provided the available e-learning usage data.

Agreed.

Number 10:

Kelley: how do you decide what classes can be offered to the employees?

Teresa: One of the expectations of the e-IDP would be to pull in the data to find out what courses were requested by the employees.

Kelley: On the IDP it can be put on that you plan to do Netg courses.

Frank G: On the IDP when you tell what courses you need, it is a way to identify what classes the employees need. We want to schedule them at the right time and place. This information is then given to the business line to prioritize the needs. This is when we get to e-IDP. Right now the employee puts on IDP and the supervisor must then supply the information to the training coordinator. Basically there will not be a separate training needs data call.

Kelley: We want to see that the training that the employees need to move forward is provided. If it's out there on the IDP and you can pull to decide what will be offered, you should be able to supply it to us. We aren't telling you what classes to offer but making sure the employee's needs are being met.

Union Caucus.

Language: Upon request, the Union will be provided the results of the annual training needs assessment.

Language approved.

Management proposes that number 11 be deleted.

Kelley: when we first did our proposals, we didn't think all of this was out there. We couldn't find it. There isn't anything in the proposal that needs a date. Ok to delete number 11 and the last sentence.

Kelley: Are we going to put in anything about marketing this?

Ron: Maybe a joint statement saying we are committed to this?

Teresa: We've addressed some of it in number 5.

Bob: Maybe a preamble.

Kelley: There's not a DFAS e-learning policy?

Frank G: No. It's hard for me to figure out how to answer. It is information that is available to the employee.

Language: The Parties are committed to Growth & Learning through e-learning resources and will actively promote opportunities to use e-learning capabilities.

Kelley: This constitutes the next step in the evolution of our CLC's and provides for the use of available technology making information available anytime, anywhere.

Above language agreed to.

Kelley: We need to address when an employee is denied training.

Pete: Is this related to the transition to the e-learning environment? Can we set it aside for now?

Kelley: These are some of the issues that came out from the CLC's closing.

Pete: A supervisor could deny training before the CLC's closing. It has nothing to do with the closing of the CLC's. I'm not denying that it's happening, and that it needs discussed. If we finish E-biz we can come back to this subject.

Union Caucus.

Kelley: For the record: I don't think that we should limit ourselves in the discussions at negotiations. Allocation of funds and tuition assistance is an issue.

For the record: The union wants to go on record to let management know that we are having problems with the training and tuition assistance.

Kelley: We have one parked issue about law, rule, and regulation. Would like to put it at the bottom.

Kelley: On the sentence regarding access for all employees, we just want clarification that this includes the handicapped employees.

Printed and distributed CLC draft memorandum for review.

Pete: Bargaining can be reopened by management on a subject only if there has been a change to the program.

Finalized CLC MOA:

## MEMORANDUM OF AGREEMENT

The Defense Finance and Accounting Service and American Federation of Government Employees Council 171 enter into this agreement for the changes of the Career Learning Centers (CLC).

The Parties are committed to Growth & Learning through e-learning resources and will actively promote opportunities to use e-learning capabilities. This constitutes the next step in the evolution of our CLC's and provides for the use of available technology making information available anytime, anywhere.

1. E-learning carrels will be maintained at current functional levels for sites that previously had a CLC. These e-learning carrels will be accessible to all employees.
2. Employee's using the e-learning carrels may seek assistance with e-learning or other HR web based applications from the employee services assistant or other appropriate personnel.
3. Colleges, universities or other organizations offering training for DFAS employees, may coordinate with the appropriate Agency representative for the use of classrooms at each DFAS site, subject to availability.
4. DFAS will provide guidance and information to employees on the use of electronic learning tools.
5. DFAS is committed to supporting Growth and Learning and encourages employees to participate in e-learning opportunities available through the DFAS e-learning center during duty hours. This training can be accomplished at the employee's workstation or the e-learning carrels.
6. Upon request, the Union will be provided the available e-learning usage data.
7. Upon request, the Union will be provided the results of the annual training needs assessment.

May 27, 2004

Changes to this agreement will be subject to bargaining in accordance with applicable law, rule, or regulation and the MOU governing the level of bargaining (December 2002).

This agreement will be effective upon its signing by the parties' authorized representatives and will remain in effect until superceded by a subsequent agreement or master agreement

Signed this date May 27, 2004

\_\_\_\_\_/s/\_\_\_\_\_  
Robert McNamara  
DFAS, Co-Chair

\_\_\_\_\_/s/\_\_\_\_\_  
Kelley Dull  
AFGE-171, Co-Chair

E-BIZ overview by Connie.

Joint Financial Managers Improvement Plan.  
Standard set of requirements of that the COTS (commercial of the shelf) system has to meet before contract can be awarded.  
FMR is the guiding regulation.

Kelley: In the processing of vouchers and purchase orders, how does it work?

Connie: Online form for the purchase order, the person can then electronically be sent for approval then funds approval. It does online edit checks on LOA, funds available within the system. Before it was a piece of paper that had to be walked around to various people for signatures/approvals. CAC only allows access into an individual workstation.

Robin: We were told that it couldn't be set up until CAC access is set up.

Connie: That isn't true.

Kelley: When the computers were set up with CAC, there were problems with it working with some programs.

Connie: It didn't have a problem with E-Biz. It does interface with DTS.

Kelley: Where is this portion? The only thing that comes up for me is timekeeping.

Connie: That's right. Most people have a link that takes you straight to timekeeping. There is a different menu that you go to. Access can be received for view only by filling out a security form filled out and signed by the employee and supervisor because of internal control.

FR: Is there a policy or regulation for DFAS for e-BIZ?

Connie: DFAS doesn't have a specific regulation it follows the FMR.

Pete: If you type e-BIZ on the e-portal multiple documents would come up. The accounting business line has something.

Connie: Mr. Bloom sent a message to management about e-BIZ saying that it is how we would be doing payroll. It uses the hour lines on the transactions to compute the DBH hours to bill the line of accounting. There are codes in your entity that tell who is actually reporting DBH hours.

Robin: On the DBH portion, who separates them and how can they bill the customer.

Connie: Project code and vendor id would distinguish between customers. Some organizations have different views on how far it is broken down.

Kelley: The BL decided how the template would be set up for each employee. My time specifically, every pay period I have to go in and change all of the codes.

Connie: You would go through your Supervisor who would get with the BLX to get the template changed.

Ron: The employee would always notify their supervisor of problems with their template and it would actually be the supervisor's responsibility to get the template changed?

Connie: The BLX is in the management role for E-biz problems.

Kelley: Are these employee managers bargaining unit employees?

Connie: I don't know who is a bargaining unit employee and who isn't. The employee managers set up the default codes and the template.

F: Is anyone still using the old DBH system?

Connie: I don't know. It was supposed to be replaced with e-BIZ.

Teresa: The BLX does the duties as a collateral duty. It is not a separate duty.

Ron: So would I see this on the BLX's standards?

Teresa: It would depend on how much of their job is spent on doing it. When originally set up there was a lot of time spent but now is just maintenance.

Ron: If it's not in the BLX's standards, why would it be put in an employee's standards to input their own timesheets.

Teresa: If I was an employee and it was on my standards I would have to question it.

Pete: e-BIZ is supposed to be put in everyday. There was system check that was run and if employees don't put their time in daily, it would throw off the report. But that was a year and a half ago. The theory is that employees were told to do it every day and they weren't. So it was put in the standards. The performance route is not what I would recommend to handle it.

Connie: We are not using the billing system daily, which was unknown when we set up the payroll system.

Pete: If a supervisor has a need for an employee to input their time in the system everyday then it would be an order that needs followed. Performance standards would not the way to make the employee do it.

Ron: We need to address this to someone so that all of them are fixed and not rely on the employees to each bring it up.

Pete: Maybe it is something that Bob can bring up at the Leadership Conference next month.

Kelley: The daily input is a problem because many have to have the input done by Wednesday and the rest of the week is projected. When payroll is being processed the system is down.

Connie: The system is only down on Tuesday from noon on.

Pete: I haven't seen any grievances from payroll being input prior to Friday.

Kelley: That's because we have been working it out without grievances.

Pete: So if you are handling it outside of the grievance procedures, than we don't know that there is a problem.

Kelley: I have had employees given counseling for an incorrect timesheet that is in draft mode.

Ron: Is there anything in the FMR or elsewhere that says when input should be made and when it becomes an official record?

Connie: I don't know if there is anything. It doesn't talk about the business policy.

Pete: The employee must certify that the time submitted is true.

Connie: The supervisor is certifying that the pay is correct and ok to pay.

Teresa: A supervisor should reject a timesheet that they know is incorrect.

Kelley: What about when time is projected because of needing to have it done for certification.

Connie: Once the supervisor has certified the timesheet an employee can do a revised timesheet. If you can catch it before the supervisor certified it then you can have it rejected.

Robin: We have so many different jobs that it's nearly impossible to track it

For the record: Not every employee submits falsified timesheets.

Frank: What is being referred to is that employees are being required to input time in prior to working or are estimating their time for the various tasks.

Robin: We have been told that we only have to account for the actual time. Now we are duplicating our work.

Kelley: She's referring to the top vs. the bottom.

Connie: On the bottom, you only need to account for the hour type. You can have multiple lines at the top, but if they are all RG then you would only need one or two lines.

Pete: I would like to believe that most of our employees try to input their time in to the best of their ability.

Victor: It is defined in the employee's standards on doing e-BIZ.

Ron: Are you aware of where e-BIZ has reduced FTE's because of e-BIZ.

Connie: I'm not aware of any work years that have been lost.

Frank: The employee, surrogate, and approver have access to the actual timesheet details.

Kelley: Do we have any BU employees that are approver's?

Pete: If there is someone that is approving timesheets, they could not be considered part of the bargaining unit.

Connie: The surrogate has access because they are acting as the employee when it is necessary.

Frank: Would the surrogate being able to view the leave and timesheet information be against the privacy act.

Connie: I'm not sure. I know all payroll documents are treated as privacy act documents.

Mark: If a surrogate passes information about an employee to others than they would be subject to disciplinary actions.

1.) There will be a window period of at least 180 days during which employees will not be disciplined or disadvantaged in their performance appraisals for errors made as they learn new procedures. (This appears to be OBE, as we are well beyond the 180-day period of initial implementation.)

Bob: This seems to be overcome by events since we are past the 180 days.

Kelley: If someone has a problem with a template and cannot get the correct person to do a correct template and use the wrong code, I shouldn't be held accountable.

Connie: It is the responsibility of the Supervisor to make sure the codes in the employee's template are correct. It is the supervisor's responsibility to make sure that the timesheet is correct when being certified and that the employee has the correct codes they need.

Ron: Are you aware on any employees being disciplined because of the language?

Teresa: No.

Ron: What would be the problem with starting with the 180 days or go back to implementation and change any discipline. We know that there is a database for grievances that have been done.

Teresa: It would depend on the circumstances. There could be someone who did purposefully do something incorrect in e-BIZ.

Ron: I'm talking about employees who used e-BIZ and got a lower rating because of that use.

Bob: We have a hard time with this because we don't know of any case where this has happened.

Ron: I don't mean to go out on a witch-hunt to find people who just want something changed.

Kelley: I know of one instance where a person was terminated and one of the charges was because of how the payroll was input in draft mode.

Teresa: If we say we don't know of any employee's that have been disciplined because of lack of understanding of e-BIZ.

Kelley: We have employees who have a written counseling because of their E-biz input.

Teresa: That kind of thing would not be tracked.

Pete: If the employee relation's specialist at Indy opened a file on one because of a question from the supervisor then there would be a record of it at Indy. If they thought the counseling was improper then they should have filed a grievance.

Mark: That's why we have a grievance procedure in place. If an employee does or doesn't want to file than they have that right.

Kelley: Have employee's had proper training on e-BIZ and the proper coding that they are supposed to use?

Connie: There was no official training done unless the business line did it. There are desk references that have been done in some business lines.

Mark: If any employee uses an incorrect code through no error of their own, the employees have not submitted a falsified timesheet.

Kelley: How does an employee prove that? If a supervisor tells an employee what code to use and then the supervisor says that he/she didn't what happens?

Mark: Then there would be a dispute. A simple mistake would not make it falsified. It would have to be intentional.

Connie: We are continually changing and adding function codes to the e-BIZ system. The changes may not be sent down to all employees.

Ron: Read some language. Is the Agency willing to do that?

Teresa: No.

Mark: If an employee feels that disciplinary action is wrong than they can file a grievance. We cannot limit the supervisors right to discipline.

Frank: The Agency gives the supervisors guidance on discipline. If the Agency is not giving the correct guidance then there is a problem.

Pete: Has any bargaining unit employee been disciplined for lack of understanding of how to use the e-BIZ system?

Frank: No one at this table knows.

Kelley: How can we address this for the current performance standards that we are getting rated on now?

Pete: Would it be an issue if employee's who have e-BIZ in their standards and receive exceeds would that be an issue?

Kelley: It's an issue that it's in there. If you extract that element and they have an exceeds before they would have an still have an exceed.

Teresa: Need to communicate with the employees and supervisors that putting T&A on their standards when it is not truly a function of their jobs, it would not be appropriate. Also need to address this to the employee's to help them understand.

Victor: Is there a driving reason why it would be on there?

Teresa: could we get a copy of one so we can see how it is worded? We can't across the board say we can take it off because some of them may be valid.

Kelley: The employee gets some type of action against them because they are unfamiliar with the process. They come to the Union to file a grievance, what would we file for? I.e. the task code was incorrect.

Pete: I would not bring up would be progressive discipline. You would need to show that the employee had no training.

Language from Bob: The Agency will address the use of e-BIZ time and attendance reporting standards in performance plans.

Ron: I would like a 180-day window in which the agency will provide assistance in the application...to both the employee and supervisors. This would allay some of the misunderstandings and miscommunications.

Pete: Is your intention to have a refresher after a year?

Teresa: There has already been a lot of information/guidance given at various times to the employees on e-BIZ.

Victor: Did the education happen at higher level or lower level?

Teresa: It was supposed to go all the way down.

Victor: Last I heard there were still a lot of rejects that were happening.

Frank: Some of the rejects are coming from employees using codes they haven't had to use previously.

Connie: The templates were built based on the normal work that an employee does.

Ron: Modified language

Teresa: There has been an effort made to identify the codes etc for the employee's. It seems that this language is not necessary now. We have provided cheat sheets and reference guides, as well as a person at the site to help.

Connie: There is still a tiger team out there trying to correct the errors that are still happening.

Robin: You say this is going to be 2 years old in August and there are still all of these problems, this concerns me.

Connie: There were rejects prior to e-BIZ. Not everything that rejects is because of the e-BIZ system/inputs by employees.

Ron: Can we park this item and go on to the next?

Teresa: Language: The Agency will continue to provide guidance to the workforce to assist with proper usage of timekeeping codes.

1) The Agency will address the use of e-BIZ time and attendance reporting standards in performance plans.

Agreed to the language for the first bullet.

2) The Agency will continue to provide guidance to the workforce to assist with proper usage of timekeeping codes.

Union Caucus.

Frank: For the employees whose primary duty is e-BIZ we don't have a problem with. This is a current evaluation period. The Agency has known about it and nothing has been done to correct the standards. We have to move to correct it. When the employee sees that the Agency is looking at it, and a month, two months etc down the line, they are told we looked at it at it's staying in. That's not fixing it.

Kelley: Are we wanting the last evaluation period 1 May 03-30 April 04 and the current 1 May 04-30 April 04.

Teresa: This proposal does not say anything about e-BIZ being on the ratings. Today is the first I have heard of it and Bob has stated it is the first he's heard of it.

Kelley: So we have procedures as to how an employee inputs their time?

Connie: We have SOP's.

Provided Management with copies of some ratings that had e-BIZ as a requirement.

Frank: What about the exceptional employees that have a hard time getting their time input daily but are exceptional in every area. They have been brought down on their rating because of e-BIZ.

Teresa: What you are asking us to do is negotiate what is in employee's performance ratings. We can't do that but we are promising to look into it.

Bob: There may be a good reason for why this is in the ratings. We don't know until we look into it.

Pete: Read part of one of the standards. We can look at it and say is it reasonably connected to the job? If it isn't and we take it out and then the employee's rating goes down, what then?

Kelley: I think in the interest of moving on we will park it.

Language and issue parked: The Agency will continue to provide guidance to the workforce to assist with proper usage of timekeeping codes.

2) There will be a 24-hour turnaround on an EFT, or other means of compensation, if an employee does not receive their full and proper pay due to a problem with the e-Biz processes. (This is a payroll issue, not e-BIZ. Implementation of e-BIZ did not change the existing emergency/supplemental pay provisions.)

Kelley: it is an E-biz issue because we have people that are not getting paid due to e-BIZ. The defaults in place for ATTAPS are not in place in e-BIZ.

Bob: We are following the rules now that we weren't following with ATTAPS.

Mark: I don't know how long it currently takes for an emergency pay. What we are saying is that the emergency/supplemental pay provisions were not changed with e-BIZ.

Frank: This creates a hardship on employees.

Bob: Does anyone know what the recovery time is?

Ron: They have the ability to FedEx it out of Pensacola within 24 hours. That is for someone who was not paid at all.

Teresa: If the employee doesn't get 90% of their paycheck, they can request a special pay. Will process within 24 hours but it may take longer to get it into the account.

Kelley: So how do we address those issues and concerns of the employee who has these problems?

Bob: Process the paperwork to get a special pay that will be processed within 24 hours.

Kelley: But this can still put the employees into a hardship. It has happened several times that the supervisor just didn't get the certification done. Through no fault of their own, the timesheet wasn't certified, and the employee didn't get paid.

Teresa: There is a check that checks this and a report is run that tells what timesheets are out there that haven't been certified. They tried to create with this system a way to make sure if a person isn't there, someone else has the ability to input the timesheet. There is always someone on site that is looking to ensure that all employees' timesheets have been certified.

Kelley: When you request advance annual, the CSR has to go in and fix your time in DCIPS for you to get paid. This was a unique situation. CSR was out on medical back up was also out on medical.

Ron: It may not be possible for an EFT to be deposited within 24 hours because of treasury requirements.

Victor: So there is an avenue for this to be taken care of?

Teresa: Yes, on the payroll side.

Kelley: Can the processes and procedures be published for the employees to follow in the case of this happening?

Parked issue.

3) Employees will be told who else has access to their time cards and will be able to see when someone else has accessed them. (In general, those who have responsibility for processing an employee's T & A and those who have e-BIZ system responsibility have access to T & A information.)

4) Only the surrogate, supervisor, or reviewer in that employee's chain of command will have access to the employee's time sheet information. (Non-negotiable as it interferes with management's right to assign work.)

Teresa: I believe I identified them in my answer. Not every BLX has access to everyone's T & A.

Ron: Is it possible to notify the employee when someone other than the normal goes into his or her timesheet.

Pete: The employee's surrogate, approver, and those who have responsibility for processing an employee's time and attendance and those who have e-BIZ system responsibility have access to an employee's T&A information.  
Parked for Connie.

Teresa: I'm not sure if a supervisor that is not the approver has or doesn't have access to view an employee's time.

Kelley: If someone goes in and inputs or changes your T&A their ID would become part of the record.

5) All E-Biz records created will be treated as a system of records under the Privacy Act.

**Mark: We can't negotiate what is and what isn't covered under the privacy act.**

**Ron: Connie made the statement that she didn't know if it was covered under the Privacy Act but the documents are treated as if they were.**

**Kelley: Mark can you check into it?**

**Mark: Yes.**

**Parked.**

7) Union Representatives designated by the Council President will be included in any and all training given. (Need to clarify - too broad.)

Teresa: The training has already been completed on e-BIZ. Why is there a need for training?

Kelley: We don't see it everyday and we don't know how encompassing it is. It's like communication, communication. We could be writing proposals for things that we might have understood from the training. We would understand the process when employees asked us questions.

Teresa: I don't think there is a training module for phase 2 & 3.

Kelley: When they had training in KC for phase 2 my RM people came to me and said that there was no way that positions could be cut because they would be doing a lot more work.

Teresa: Have you been told about problems?

Kelley: The RM people are doing mandatory overtime because of it.

Pete: When you do e-BIZ and input your time, does it flow straight to Phase 2 of e-BIZ?

Bob: Yes.

Kelley: We also have technicians who are inputting documents that are outside of timekeeping.

Pete: Rather than going through having everyone get on a plane, someone at each site may be able to show how the process is working.

Ron: When talking about training we are referring to a more official type training.