

January 23, 2007

M E M O R A N D U M

TO: IRS Chapter Presidents

RE: Update on Settlement of Accounting Course Reimbursement
Grievance for GS-526 Positions

SUMMARY: As recently announced, NTEU and the IRS have negotiated a claims process resolving the national accounting course reimbursement grievance. Information on the terms of the settlement, including the process for filing claims for reimbursement, will be posted on the W&I and SB/SE intranet sites from February 1 to March 2, 2007. Eligible employees must file a claim for reimbursement by **April 2, 2007.**

In a chapter presidents' memo dated December 22, 2006, I informed you that NTEU has reached agreement with the Internal Revenue Service (IRS) on the terms of a settlement resolving its national accounting course reimbursement grievance. The grievance sought reimbursement for course tuition and materials for employees who were initially placed in Tax Resolution Representative (TRR), Tax Specialist (TS), and Tax Compliance Officer (TCO) positions on a Qualifying Position Description until they could demonstrate the required accounting competency to qualify for a permanent position.

Under the terms of the settlement agreement, the IRS has agreed to reimburse eligible employees who were improperly denied reimbursement for tuition and materials costs for accounting courses that they took to meet position qualifications. To be eligible for reimbursement, an employee must (1) have been placed in a TRR, TS, or TCO position on a Qualifying Position Description; (2) have been preapproved by their supervisor for an eligible course or, if not preapproved, enrolled in an eligible traditional classroom course; and (3) not have previously failed the course for which the employee seeks reimbursement (as defined by IRS's Policy for the Reimbursement of Tuition and Fees, dated April 30, 2000).

From February 1 to March 2, 2007, the IRS will post a joint NTEU-IRS notice on its W&I and SB/SE intranet sites informing potentially affected employees of the settlement and briefly explaining the processes for claiming reimbursement. Eligible employees must file a claim with the IRS by April 2, 2007.

If you would like further details or have any questions, you may contact Julie M. Wilson, Assistant Counsel, at (202) 572-5500, extension 7090, or via e-mail at Julie.Wilson@nteu.org.

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