

1 **Article 26**

2
3 **Merit Promotion**

4
5 **Section 1. Purpose and Policy**

6
7 The purpose ~~and intent~~ of the provisions contained herein are to ensure that
8 merit promotion principles are applied **in a consistent manner with equity** to all
9 employees without regard to political, religious, or labor organization affiliation or
10 non-affiliation, marital status, race, color, sex, national origin, disabling condition,
11 age, sexual orientation, **genetic information, gender identity, size, nepotism**
12 **or cronyism** and shall be based solely on job-related criteria. This article sets
13 forth the merit promotion system, policies, and procedures applicable to
14 bargaining unit position employees in the Administration.

15
16 ~~**Section 2. Career Development Programs**~~

17
18 ~~A. The Agency will determine when to offer career development programs to~~
19 ~~prepare employees for potential future jobs or assignments. Such programs~~
20 ~~will be offered depending on the availability of funds and the needs of the~~
21 ~~Agency. The Agency will publicize all career development programs when~~
22 ~~they are announced. Announcements will contain adequate specific~~
23 ~~application instructions.~~

24

25 ~~B. Career Development Programs will provide opportunities for temporary~~
26 ~~developmental assignments, to increase knowledge of SSA programs and~~
27 ~~work processes. The National Training Committee will be an appropriate~~
28 ~~forum for making recommendations and sharing information on agency-wide~~
29 ~~career development programs.~~

30

31 ~~C. Neither party waives its rights under 5 U.S.C. 71 regarding the~~
32 ~~implementation of career development programs.~~

33

34 **Section 2--Development of Career Pathways**

35

36 **A. The parties will explore various means of enhancing career**
37 **opportunities, including but not limited to career ladders, inter-**
38 **component movement, broad banding, etc.**

39

40 **B. The parties are committed to establishing career ladder positions**
41 **within the organization in those situations where positions and**
42 **functions can be grouped in a way compatible with program and work**
43 **considerations.**

44

45 **C. The parties agree to develop and implement career ladder positions**
46 **utilizing the following process:**

47

48 **1. Joint union and management committees will be**
49 **established within 60 days of the effective date of this**
50 **agreement.**

51

52 **a. Each SSA Component (Deputy Commissioner**
53 **level) will establish a joint committee with**
54 **appropriate and necessary subcommittees.**

55

56 **b. Each party will appoint its own members to the**
57 **committee. The parties at the appropriate**
58 **component level will jointly develop the**
59 **committee(s) make-up.**

60

61 **c. The committees will have appropriate personnel**
62 **and classification support.**

63

64 **d. The National Union Management Committee will**
65 **provide oversight of the joint committees in the**
66 **development and implementation of career ladder**
67 **positions.**

68

69

2. Joint Committee Charter--In accordance with the commitments

70

expressed in this article, the committees are chartered to:

71

a. review and consider existing positions and work functions within the respective component in all job categories (i.e. professional, technical, administrative, clerical, wage grade).

72

73

74

75

b. consolidate/revise existing positions and develop career ladder positions where appropriate. The committees will attempt to design career ladders which provide opportunities for both lateral movement between career ladder positions and promotion to higher-grade career ladder positions.

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82

c. Within timeframes established by the National Union Management Committee, submit a final report including job descriptions in sufficient detail to allow for classification action upon approval by the National Union Management Committee.

83

84

85

86

87

88

D. The National Union Management Committee will establish a joint committee to recommend approaches for expanding opportunities for employee movement across component lines.

89

90

91

92 **E. The National Union Management Committee will either approve or**
93 **remand joint committee recommendations timely.**

94

95 Section 3. Career Ladder Positions

96

97 A. Career ladder positions help employees to develop to successfully
98 perform higher-level duties through training and incremental assignment of
99 more complex work. The responsibilities assigned to the entry levels of
100 career ladder positions will involve more basic skills and knowledge, as
101 compared to the journey level responsibilities. The responsibilities at each
102 level of the career ladder position will be conveyed to employees **through the**
103 **position description and career ladder plan. Career ladder plans will be**
104 **developed that are tailored to the complexity of the job duties and that**
105 **will permit individuals to proceed at their own pace in learning and**
106 **assuming the fuller range of duties.**

107

108 B. A career ladder plan ~~may~~ **will** be established for **each** career ladder position.
109 ~~If a career ladder plan is developed the criteria which an employee must meet~~
110 ~~in order to be promoted will be outlined.~~ **The career ladder plan will outline**
111 **the objective criteria for each grade level which an employee must meet**
112 **in order to be promoted.** A copy of the plan will be given to each employee
113 upon entry into the career ladder position and when he/she is promoted to a

114 new level of the career ladder plan. The employee will also be advised of
115 his/her earliest date of promotion eligibility. ~~In addition, the employee will be~~
116 ~~provided with a copy of any revised career ladder plan within 30 days of such~~
117 ~~revision.~~

118

119 **Revisions of career ladder plans will be done jointly through provisions**
120 **developed by the National Union Management Committee. When career**
121 **ladder plans are established and/or revised, the Administration will**
122 **provide notice to the Union in accordance with Article 4 of this contract**
123 **or under provisions established by the National Union Management**
124 **Committee. The employee will be provided with a copy of any revised**
125 **career ladder plan within 30 days of such revision.**

126

127 **Each plan must set forth the title, series, grades, position numbers,**
128 **organizational location of the positions in the ladder, the functions of**
129 **the positions within the ladder, the training and development**
130 **opportunities that will be provided at each level, and the criteria by**
131 **which employees' readiness for promotion to the next grade level will**
132 **be measured.**

133 Section 4. Career Ladder Advancement

134

135 A. At the time the employee reaches his/her earliest date of promotion eligibility,
136 the Administration will decide whether or not to promote the employee.

137

138 1. If an employee is ~~eligible for promotion~~ **certified as successful and is**
139 **meeting the promotion criteria in the career ladder plan**, the
140 Administration will certify the promotion which will be effective at the
141 beginning of the first pay period after the requirements are met.

142

143 ~~2. Any time the supervisor recognizes an employee's need for assistance in~~
144 ~~meeting the performance expectations necessary to progress to the next~~
145 ~~grade, the supervisor will develop a plan to assist the employee. The plan~~
146 ~~should include all applicable training as well as any other appropriate~~
147 ~~support. If a non-probationary employee fails to meet the promotion~~
148 ~~criteria after the appropriate assistance, the Administration may:~~

149

150 a. ~~Provide the employee with additional time to meet the promotion~~
151 ~~criteria.~~

152

153 b. ~~Reassign the employee to another position at the same grade and~~
154 ~~step or~~

155

156 c. ~~Propose placement of the employee in a position at a lower~~
157 ~~grade.~~

158

159 **2. If an employee is not meeting the criteria for promotion as**
defined in his/her career ladder plan, the employee will be

160 **provided with a written notice at least 60 days prior to earliest**
161 **date of promotion eligibility. The written notice will state what**
162 **the employee needs to do to meet the promotion plan criteria.**

163 **a. If the employee is making progress, the**
164 **supervisor will ensure that he/she has the**
165 **opportunity to acquire pertinent skills and**
166 **knowledge and to demonstrate that he/she meets**
167 **promotion requirements as soon as is feasible.**

168 **b. If the employee is experiencing problems, the**
169 **provisions in (Section 4 B below) are applicable.**

170
171 3. In the event that the employee met the promotion criteria but the
172 appropriate management official failed to initiate the promotion timely, the
173 promotion will be retroactive to the beginning of the first pay period after
174 the pay period in which the requirements were met.

175
176 **B. At any time a supervisor and/or the employee recognizes the**
177 **employee's need for assistance in meeting the career ladder**
178 **advancement criteria, the supervisor, employee and Union**
179 **representative will develop a plan tailored to assisting the employee in**
180 **meeting the criteria. The plan should include all applicable training as**
181 **well as any other appropriate support.**

182

183 **If a non-probationary employee fails to meet the promotion criteria after**
184 **the appropriate assistance, the Administration will:**

185 **1. provide the employee with additional time of at least**
186 **six (6) months to meet the promotion criteria. The**
187 **Agency will promote the employee at any time during**
188 **the additional (6) six month period that the employee**
189 **meets the promotion criteria.**

190 **2. assign the employee duties commensurate with**
191 **his/her current grade:**

192 **The career ladder plan may be suspended**
193 **and the employee will remain at the level**
194 **he/she attained within the career ladder.**

195
196 **At the employee's request, he/she can reinstitute the career**
197 **ladder plan non-competitively.**

198
199 **At the request of the employee, an employee may request a reassignment**
200 **to the same grade in another career ladder plan commensurate with his/her**
201 **qualifications. The Agency will give serious consideration to the**
202 **employee's request.**

203

204 **Section 5. Applicability of Competitive Procedures**

205

- 206 A. Promotions - Any selection for promotion must be made on a competitive
207 basis unless it is excluded by Section 6 below.
208
- 209 B. Reassignments/Changes to Lower Grade - Any selection to a position that
210 provides specialized experience as defined in the OPM Qualification
211 Standards that the employee does not already have and is required for
212 subsequent promotion to a designated higher-grade position and/or to a
213 position with known promotional potential must be made on a competitive
214 basis.
215
- 216 C. Details - Competitive procedures will be applicable to any selection for detail
217 of more than ~~420~~ **10** days to a higher-grade position, to a position with known
218 promotional potential, or a position which provides specialized experience as
219 defined in the OPM Qualification Standards required for subsequent
220 promotion to a designated higher-grade position.
221
- 222 D. Training - Competitive procedures will be applicable to selections for training
223 when eligibility for promotion to a particular position depends on whether the
224 employee has completed that training.
225
- 226 E. Appointments - Competitive procedures apply to the transfer of a Federal
227 employee or to the reinstatement of a former Federal employee to a position
228 above the highest grade previously held permanently unless the position is a

229 higher-graded successor position or to a position at or below that grade if the
230 position has promotional potential above the highest grade previously held
231 permanently. The employee must not have been demoted or separated for
232 personal cause from the higher grade(s) and, when competitive procedures
233 apply, be identified as a well-qualified candidate with eligible SSA employees
234 to be eligible for appointment. To the extent feasible, the same qualification
235 standards and the same methods of evaluation will be applied to both SSA
236 employees and persons being considered for appointment to higher-graded
237 positions above the highest grade previously held permanently by transfer or
238 reinstatement. **If it is determined that these methods are not feasible, the**
239 **parties will meet and negotiate pursuant to this Agreement.**

240

241 **F. The procedures for vacancies filled under competitive actions are**
242 **described in this Article.**

243

244 Section 6. Applicability of Noncompetitive Actions

245

246 A. Promotions - The following promotions may be taken on a noncompetitive
247 basis unless otherwise provided:

248

249 1. Promotion of the incumbent of a position that is reclassified at a higher
250 grade due to the accretion of additional duties and responsibilities and not
251 a planned management action. To be eligible for a noncompetitive

252 promotion in this situation the employee must have performed the higher-
253 level duties for at least 6 months, must have continued to perform the
254 same basic function, and the employee's former position must be
255 absorbed administratively into the new position.

256

257 2. Promotion of an incumbent or an individual entitled to reemployment rights
258 to a position that is reclassified to a higher grade without significant
259 change in duties or responsibilities, either on the basis of a new
260 classification standard or as the result of correction of an original
261 classification error. When the incumbent of the upgraded position meets
262 the legal requirements and qualification standards for promotion to the
263 higher grade, the incumbent will be promoted.

264

265 3. Promotion of an employee previously selected competitively for a lower
266 step of a career ladder.

267

268 4. Promotion after receiving priority consideration.

269

270 5. Promotion of an employee when directed by authorized authorities (i.e.,
271 judges, arbitrators, FLRA and other appropriate authorities).

272

273 6. Agencies may non-competitively reinstate, transfer, promote an employee
274 up to the highest grade and step previously held on a permanent basis

275 under career or career-conditional appointment, provided the employee
276 was not demoted or separated from that grade because of deficiencies in
277 performance or "for cause" reasons.

278

279 7. Temporary promotions to a higher grade totaling ~~420~~ **10** days or less
280 during any 12 month period. If a temporary promotion that was not
281 expected to exceed ~~420~~ **10** days was originally made on a noncompetitive
282 basis, any extension beyond ~~420~~ **10** days must be made under
283 competitive procedures. **The procedures for filling these temporary**
284 **promotions will be those listed in Article 27, Section 9.**

285

286 8. Career ladder promotions following noncompetitive conversion of a
287 Student Career Experience Program (SCEP) or Federal Career Intern
288 Program (**FCIP**) employee in accordance with the requirements of
289 applicable OPM policy.

290

291 9. Promotion of an employee covered by an approved training agreement.

292

293 10. Promotion of an employee placed competitively in a trainee position.

294

295 B. Reassignments/Changes to Lower Grade - A reassignment or change to
296 lower grade to a position that does not provide specialized experience as
297 defined in the OPM Qualification Standards that the employee does not

298 already have and is required for subsequent promotion to a designated
299 higher-grade position or to a position having no known promotional potential
300 may be taken on a noncompetitive basis.

301

302 C. Details - The following details may be made on a noncompetitive basis:

303

304 1. Details of ~~120~~ **10** days or less to a higher-grade position.

305

306 2. Details of ~~120~~ **10** days or less to a position at the same or lower grade
307 with known promotional potential, or to a position which provides
308 specialized experience as defined in the OPM Qualification Standards
309 required for subsequent promotion to a designated higher-graded position.

310

311 3. Details to a position at the same or lower grade with no known promotion
312 potential, or to a position which does not provide specialized experience
313 as defined in the OPM Qualification Standards required for subsequent
314 promotion to a designated higher-graded position.

315

316 4. Details to unclassified duties.

317

318 Promotional credit or points may not be given for ~~details of 30 calendar days or~~
319 ~~less.~~ **any non-competitive detail, including any non-competitive temporary**

320 **promotions. Procedures to be applied for filing such non-competitive**
321 **details are pursuant to Article 27, Section 9.**

322

323 D. Other Noncompetitive Actions

324

325 1. Conversion of an employee from a temporary promotion to a permanent
326 promotion in the same position and office provided the vacancy
327 announcement for the temporary promotion indicated that the promotion
328 could later become permanent.

329

330 2. Selection from an OPM approved register or delegated examining unit
331 certificate of eligibles.

332

333 3. Transfer of a Federal employee or reinstatement of a former Federal
334 employee (including conversion to reinstatement from a temporary
335 appointment) to a position at the same or lower grade than the highest
336 permanent grade held under a career or career-conditional appointment
337 provided the candidate was not demoted or separated for personal cause
338 from a higher grade and also provided that the position does not have
339 known promotional potential to a grade higher than the highest permanent
340 grade held.

341

342 4. Reinstatement to the same career ladder position for which an employee
343 was previously selected competitively or to a similar career ladder position
344 having similar qualification requirements and having no greater known
345 promotional potential.

346

347 5. Reinstatement of a former SSA employee to a position which is the
348 higher-graded successor to a position he/she previously held. Such
349 reinstatements may be made non-competitively when classification of the
350 successor position is based on the establishment of a new position
351 classification standard or the revision of a position classification standard.

352

353 6. A position change permitted by reduction-in-force regulations.

354

355 E. Additional procedures for noncompetitive details are described in Article 27.

356

357 Section 7. Vacancy Announcements and Areas of Consideration

358

359 A. All actions requiring the use of competitive procedures **as delineated in**
360 **Section 5 of this Article** ~~under this Agreement~~ will be announced ~~on the~~
361 ~~SSA Intranet.~~ **and posted throughout the area of consideration on an**
362 **Agency web site which will be made available to all employees.**

363

364 ~~B. Areas of Consideration~~

365

366 ~~1. Normal Area of Consideration~~

367

368 ~~The normal area of consideration for a position is that area in which the~~
369 ~~Agency should reasonably expect to locate enough best qualified~~
370 ~~candidates. The normal area of consideration will always include 4100~~
371 ~~applicants.~~

372

373 ~~a. For positions with headquarters duty stations:~~

374

375 ~~1. The normal area of consideration for GS-15 and equivalent~~
376 ~~Federal Wage System (FWS) positions with~~
377 ~~Baltimore/Washington, D.C./Falls Church headquarters duty~~
378 ~~stations is Baltimore/Washington, D.C./Falls Church~~
379 ~~headquarters-wide and 4100 applicants. At the discretion of~~
380 ~~management, the normal area of consideration for positions~~
381 ~~at this level may be expanded nationwide.~~

382

383 ~~2. The normal area of consideration for positions at GS-14 and~~
384 ~~below and equivalent FWS positions with Baltimore~~
385 ~~headquarters duty stations is Baltimore/Washington, D.C.~~
386 ~~headquarters-wide and 4100 applicants.~~

387

388 ~~3. The normal area of consideration for positions at GS-14 and~~
389 ~~below and equivalent FWS positions with Falls Church~~
390 ~~headquarters duty stations is Falls Church/Washington, D.C.~~
391 ~~headquarters-wide and 4100 applicants.~~

392
393 ~~4. The normal area of consideration for positions at GS-14 and~~
394 ~~below and equivalent FWS positions with Washington, D.C.~~
395 ~~headquarters duty stations is Baltimore/Washington,~~
396 ~~D.C./Falls Church headquarters-wide and 4100 applicants.~~

397
398 ~~b. For positions with duty stations in the field/regions (includes~~
399 ~~Operations field/regional offices, TSCs, PSCs, the DOC, OHA~~
400 ~~hearing/RCALJ offices, ORQAPA satellite/regional offices, Offices~~
401 ~~of the Regional Chief counsels, OIG field/regional offices and~~
402 ~~headquarters positions with duty stations other than~~
403 ~~Baltimore/Washington D.C./Falls Church):~~

404
405 ~~1. The normal area of consideration for positions at the GS-8~~
406 ~~through GS-15 levels and equivalent FWS levels is SSA~~
407 ~~region-wide and 4100 applicants. This area of consideration~~
408 ~~includes all SSA installations in the region in which the duty~~
409 ~~station of the vacancy is geographically located. At the~~
410 ~~discretion of management, the normal area of consideration~~

411 ~~for positions at this level may be expanded to include all, or~~
412 ~~portions, of other regions or SSA nationwide.~~

413

414 ~~2. The normal area of consideration for positions at the GS-7~~
415 ~~level and below and equivalent FWS levels is SSA~~
416 ~~commuting area wide and 4100 applicants. This area of~~
417 ~~consideration includes all SSA installations in the commuting~~
418 ~~area of the vacancy. At the discretion of management, the~~
419 ~~normal area of consideration for positions at this level may~~
420 ~~be expanded to include all, or portions, of other regions or~~
421 ~~SSA nationwide.~~

422

423 ~~3. For positions in the Philadelphia region, the SSA region-wide~~
424 ~~and SSA commuting area-wide areas of consideration do not~~
425 ~~include Baltimore/Washington, D.C./Falls Church~~
426 ~~headquarters. However, 4100 applicants are still included in~~
427 ~~the area of consideration.~~

428

429 ~~c. When filling a higher graded position which has been created by~~
430 ~~reengineering the duties of one or more lower graded position(s),~~
431 ~~the area of consideration will be restricted to the incumbents of the~~
432 ~~lower graded position(s).~~

433

434 ~~2. Automatic Areas of Consideration~~

435

436 ~~a. Management may request an automatic area of consideration,~~
437 ~~defined as the automatic consideration of incumbents of a specific~~
438 ~~organizational component or other grouping of positions without~~
439 ~~being required to apply for the vacancy.~~

440

441 ~~b. An automatic area of consideration consists of employees who are~~
442 ~~identified as candidates for a vacancy without being required to~~
443 ~~apply. An automatic area of consideration will be used together~~
444 ~~with a vacancy posting procedure and applicants will be assessed~~
445 ~~with those in the automatic area of consideration.~~

446

447 ~~3. Expanding Areas of Consideration~~

448

449 ~~When the area of consideration is not expected to produce an adequate~~
450 ~~number of best qualified candidates for the selecting official's~~
451 ~~consideration, Management can expand the area of consideration. The~~
452 ~~vacancy announcement will identify the expanded area of consideration.~~

453

454 ~~4. Reducing Area of Consideration~~

455

456 ~~When solicitation throughout the normal area of consideration would be~~
457 ~~impractical because of operational needs, Management can reduce the~~
458 ~~area of consideration. 4100 applicants will be included in a reduced area~~
459 ~~of consideration. The announcement package will contain the reduced~~
460 ~~area of consideration documentation.~~

461

462 **B. For a period of 10 workdays prior to considering candidates from**
463 **outside the AFGE bargaining unit, the Employer agrees to first**
464 **consider for selection internal candidates.**

465

466 ~~C. Information on Vacancy Announcements~~

467

468 ~~1. Vacancy announcements will include, as a minimum:~~

469

470 ~~a. Statement of nondiscrimination;~~

471

472 ~~b. Announcement number and opening and closing dates;~~

473

474 ~~c. Position number(s), title(s), series, and grade;~~

475

476 ~~d. Number of vacancies to be filled;~~

477

478 ~~e. Geographic and organizational location;~~

479

480 ~~f. Time in grade requirements, if any;~~

481

482 ~~g. Area of consideration;~~

483

484 ~~h. A requirement that the employee be in good standing;~~

485

486 ~~i. Summary of qualification requirements (including KSAs);~~

487

488 ~~j. Hours of work and/or the availability of alternative work schedule~~
489 ~~options;~~

490

491 ~~k. If appropriate, a statement that the vacant position is a trainee~~
492 ~~position leading to a noncompetitive promotion;~~

493

494 ~~l. Permanent or temporary nature, and duration, if temporary;~~

495

496 ~~m. Filing instructions;~~

497

498 ~~n. Name and telephone number of the personnel specialist or other~~
499 ~~individual to contact for information relating to the announcement;~~

500

501 ~~o. The Servicing Personnel Office (SPO) or the address where the~~
502 ~~application is to be submitted;~~

503
504 ~~p. Statement that applications must be received in the SPO by the~~
505 ~~closing date of the announcement, or postmarked no later than that~~
506 ~~date.~~

507
508 ~~q. Statement that relocation expenses will be paid in accordance with~~
509 ~~Federal Travel Regulations and other applicable laws and~~
510 ~~Government-wide rules and regulations.~~

511
512 **C. In January of each year, the Agency agrees to provide to the AFGE Council**
513 **Presidents and Presidents of Locals 1923 and 2809, yearly information on the**
514 **number of bargaining unit vacancies by grade, and series, component,**
515 **location, and job title filled with bargaining unit employees an Agency**
516 **employee for the prior year.** Information will also be included on bargaining
517 unit external hires for the prior year. **In addition, information will be provided**
518 **yearly regarding retention rates and types of hires for new employees and**
519 **nature of hiring authority used for new employees, e.g. FCIP, outstanding**
520 **scholar, etc., in the format stated above.**

521
522 ~~D. Posting and Distribution of Vacancy Announcements~~

523

524 ~~1. Vacancy Announcements will be posted on the SSA Intranet. A hardcopy~~
525 ~~will be provided to employees upon request.~~

526

527 ~~a. Individual vacancy announcements will remain open and posted for~~
528 ~~15 workdays.~~

529

530 ~~b. Open continuous announcements will remain posted at all times~~
531 ~~unless the Administration determines to discontinue the use of~~
532 ~~these announcements. An employee may file at any time as~~
533 ~~outlined in the vacancy announcement. The cutoff date for~~
534 ~~applicants to be considered for a specific vacancy will be the date~~
535 ~~the request to fill the vacancy is received in the SPO. Applications~~
536 ~~received after that date will be considered for future vacancies.~~

537

538 ~~c. Vacancy Announcements may be cancelled at any time. The~~
539 ~~cancellation of a Vacancy Announcement will be posted on the~~
540 ~~SSA Intranet, and the announcement package will be documented~~
541 ~~with the cancellation documentation.~~

542

543 ~~d. If a vacancy announcement has been posted and is later found to~~
544 ~~contain a substantial error, the announcement will be amended if~~
545 ~~the selecting official still intends to fill the position under the~~
546 ~~competitive process. The amendment should cite the change(s)~~

547 ~~and indicate whether the original applicants need to refile in order~~
548 ~~to be considered.~~

549

550 ~~The Agency agrees to provide to the AFGE Council Presidents and~~
551 ~~President of Local 1923 yearly information on the number of~~
552 ~~bargaining unit vacancies by grade and series filled with bargaining~~
553 ~~unit employees. Information will also be included on bargaining unit~~
554 ~~external hires for the prior year.~~

555 **D. Areas of Consideration**

556

557 **1. The geographic area of consideration for all positions is SSA**
558 **wide.**

559

560 **2. Reducing the Area of Consideration - Mandatory Reduction--**
561 **Where a position is re-engineered to a higher grade, the area of**
562 **consideration must be restricted to those employees performing**
563 **the duties, which form the basis for the higher grade. (In filling**
564 **such positions, competitive procedures must be used and**
565 **candidates usually are identified by the Servicing Personnel**
566 **Office rather than through a vacancy announcement and**
567 **application procedure.) The term "Re-engineered Position" means**
568 **a new position resulting from the restructuring of the duties of**

569 **one or more already established positions through planned**
570 **management action.**

571

572 **3. Consideration of SSA Candidates for Reinstatement. Where a**
573 **former SSA employee applies for reinstatement, and is eligible**
574 **for consideration, the Servicing Personnel Office will**
575 **determine the bargaining unit positions for which the**
576 **individual may be considered and if consideration must be**
577 **competitive. When consideration is given, noncompetitive**
578 **referral will initially be made for (a) positions at the last grade,**
579 **(b) a position which is the higher-graded successor to a**
580 **position he/she previously held, and (c) positions at any**
581 **higher grade(s) the employee held permanently if the**
582 **employee was not demoted or separated for personal cause**
583 **from the higher grade. However, if vacancies do not exist at**
584 **these grades and if requested by the employee, referral may**
585 **be made to a lower-grade position. Last grade is defined as the**
586 **grade of the last position held under a non-temporary**
587 **appointment for reinstatement candidates. If applicants accept**
588 **referral to the lower-level position, they must sign a statement**
589 **that they fully understand and accept the referral. However,**
590 **employees will also be informed that they do not have to**
591 **accept a lower position in order to be reinstated.**

592 **Consideration for bargaining unit positions above the last**
593 **grade permanently held must be competitive.**

594

595 E. Information on Vacancy Announcements.

596

597 Vacancy announcements will include, as a minimum:

598 **1. Statement of nondiscrimination;**

599 **2. Announcement number and opening and closing dates;**

600 **3. Position number(s), title(s), series, and grade(s);**

601 **4. Number of vacancies to be filled;**

602 **5. Promotional test to be used, if any; and where applicable,**
603 **positions in the "same-line-of-work;"**

604 **6. Geographic and organizational location;**

605 **7. Time in grade requirements, if any;**

606 **8. Area of consideration;**

607 **9. Summary of qualification requirements (including KSA's),**

608 **10. Hours of work and/or the availability of alternative work schedule**
609 **options, including work-at-home;**

610 **11. If appropriate, a statement that the vacant position is a trainee position**
611 **leading to a noncompetitive promotion;**

612 **12. Permanent or temporary nature, and duration, if temporary;**

613 **13. Filing instructions which include the employee’s responsibilities in**
614 **completing all applicable forms and questions and the adverse**
615 **impact of not following such instructions;**

616 **14. Name and telephone number of the personnel specialist or other**
617 **individual to contact for information relating to the announcement; specific**
618 **assessment criteria and other information relating to the**
619 **announcement; and**

620 **15. The Servicing Personnel Office (SPO) or the address where the**
621 **application is to be submitted.**

622 **16. Statement that applications must be received in the SPO by the**
623 **closing date of the announcement, or postmarked no later than that date.**

624 **17. Statement that relocation expenses will be paid in accordance with**
625 **Federal Travel Regulations and other applicable laws and Government-**
626 **wide rule and regulations.**

627 **18. Name of selecting and approving officials.**

628 **19. Copy of the assessment criteria to be utilized to rate and rank**
629 **the qualified candidates.**

630 **20. Application to be filed – SSA-45.**

631

632 **The Administration agrees to standardize SSA vacancy announcements.**

633

634 **F. Announcing Career Ladder Vacancies and Vacancies Covered by**
635 **Training Agreements.**

636

637 **Career ladder vacancies and vacancies covered by training**
638 **agreements may be announced at any or all grades. The Union**
639 **will be provided with written notice of any changes in the posting**
640 **of these announcements, prior to being posted. A list of national**
641 **and regional training agreements by component will be given to**
642 **the Council Presidents within 30 days of the effective date of this**
643 **agreement.**

644

645 **G. Posting and Distribution of Vacancy Announcements.**

646

647 **1. The Administration agrees to provide a copy of vacancy**
648 **announcements and assessment criteria to both Union officials**
649 **and employees, upon request and those in SSA headquarters will**
650 **also receive a copy of the SSA-285. The Administration agrees to**
651 **post vacancy announcements within the area of consideration**
652 **and to make copies available to employees upon request, in**
653 **accordance with the following:**

654

655 2. Individual vacancy announcements will remain open and posted for
656 15 workdays.

657

658 **3. Open continuous announcements will be posted annually.** An
659 employee may file at any time as outlined in the vacancy
660 announcement. **Employees will be responsible for making**
661 **updates to their applications when a change is appropriate.**
662 **When the Agency uses an open and continuous**
663 **announcement for a vacancy, a vacancy announcement will**
664 **also be posted pursuant to G2 above.** The cutoff date for the
665 applicants to be considered for a specific vacancy will be the date
666 the request to fill the vacancy is received in the SPO. Applications
667 received after that date will be considered for future vacancies.

668

669 **H. Amending Vacancy Announcements.**

670

671 If a vacancy announcement has been posted and is later found to contain
672 a substantial error, the announcement will be amended if the selecting
673 official still intends to fill the position under the competitive process. The
674 amendment should cite the change(s) and indicate whether or not the
675 original applicants need to re-file in order to be considered.

676

677 **I. Announcements for vacancies to be filled externally through OPM via**
678 **USA Staffing, USA Jobs, etc. (e.g. FCIP) and any development programs**
679 **(LDP, IPA, etc.) will be distributed to all SSA employees via office**
680 **bulletin boards and email and will remain posted through the closing**
681 **date.**

682
683 **J. If a vacancy announcement is cancelled, the reason for the**
684 **cancellation shall be noted on the promotion certificate and/or made**
685 **part of the promotion file. A copy of the document showing the reason**
686 **will be simultaneously sent electronically to the General Committee**
687 **members and all applicants. Such cancellations will not be used to**
688 **compromise merit promotion principles.**

689
690 Section 8. Employee Applications

691
692 A. Who Must File: To be considered for an announced vacancy, an employee
693 must file and sign the appropriate application (as described in the
694 announcement). **Applications will be written or electronic, using the**
695 **SSA-45.** ~~unless the employee is in an automatic area of consideration.~~
696 ~~When an automatic area of consideration is used, an employee need not file~~
697 ~~unless the announcement specifies that they must file.~~

698

699 B. Time Limits: The time limits for filing for an announced vacancy are as
700 follows:

701

702 ~~1. Individual Announcements - Applicants who wish to be considered for a~~
703 ~~posted vacancy must apply as required by the announcement. The~~
704 ~~appropriate application forms and any other documentation requested~~
705 ~~must be submitted in accordance with the timeframe specified in the~~
706 ~~announcement.~~

707 **1. Individual Announcements - For an individual announcement,**
708 **an employee's application must be received by the Servicing**
709 **Personnel Office, or postmarked, by the closing date shown on**
710 **the vacancy announcement.**

711

712 **a. Delayed Filing: If an employee's filing of an application**
713 **is delayed beyond the closing date because the**
714 **employee was awaiting information which a**
715 **management official had agreed to furnish, the**
716 **employee will have 3 workdays to submit the application**
717 **following receipt of the information. The employee**
718 **should attach to the late application a brief note by**
719 **his/her supervisor verifying the delay.**

720

721 **b. Scheduled Absence Over 3 Weeks: Employees**
722 **scheduled to be absent in excess of 3 weeks for any of**
723 **the following reasons:**

724 **(1) Approved leave**

725 **(2) Details**

726 **(3) Training courses**

727 **(4) Official business**

728 **(5) Compensable injury**

729 **(6) Service with the military, public international**
730 **organizations, or with State or local governments:**

731 **Will be considered for promotional opportunities**
732 **within the area of consideration for vacancies which**
733 **occur during their absence. Prior to departure,**
734 **employees should complete an application with a**
735 **written request and submit it to their Servicing**
736 **Personnel Office who will ensure that the application**
737 **is considered for vacancies for which the employee**
738 **is eligible. Employees, who so desire, may provide**
739 **information so that they can be contacted during**
740 **their absence, and thus provide additional**
741 **information, as needed.**

742 **c. Scheduled Employee Absence During Entire Posting**
743 **Period: Employees temporarily absent on approved**
744 **leave, detail, at training courses, or on official business**
745 **for an entire posting period may, upon their return,**
746 **review position vacancies announced and closed during**
747 **their absence and make application for such vacancies**
748 **in which they are interested. Such late applications must**
749 **be submitted within 3 workdays after return to duty and**
750 **must be accompanied by a statement prepared and**
751 **signed by the employee, and also signed by his/her**
752 **supervisor, explaining the dates and reason(s) for the**
753 **employee's absence. Employees filing delayed**
754 **applications under this provision will be considered**
755 **only for those vacancies for which well-qualified**
756 **candidates have not yet been identified. If a vacancy**
757 **was not posted at all, employees filing delayed**
758 **applications under this provision will be considered**
759 **fully, if the position(s) has not yet been filled.**

760 ~~2. Short-Term Absence – An employee on approved absence from duty for 1~~
761 ~~to 3 weeks may file for a vacancy upon returning to duty. Employees absent~~
762 ~~throughout the entire open period of an announcement must apply within 3~~
763 ~~workdays following their return. The application must be accompanied by~~
764 ~~supervisory certification of the dates of absence. The SPO will arrange for~~

765 ~~the employee's consideration if the BQL has not yet been furnished to the~~
766 ~~selecting official.~~

767

768 ~~3. Long-Term Absence – Prior to departure, employees who are scheduled to~~
769 ~~be absent in excess of 3 weeks should provide the SPO with a written request~~
770 ~~to be considered for positions posted during their absence and a complete~~
771 ~~application form. The request must cite the title, series, grade and specific~~
772 ~~organization location of each position for which they wish to be considered.~~

773

774 C. Multiple Applications: When an employee has applied for, or been
775 automatically considered for, more than one announcement, he/she will be
776 bound by the first promotion or reassignment (in the case of a career ladder)
777 for which the employee has reported unless:

778

779 1. He/she has accepted a reassignment and another vacancy leads to a
780 promotion to a higher grade;

781

782 2. Another vacancy is in a career ladder or a trainee position leading to a
783 higher grade;

784

785 3. He/she has accepted a temporary promotion or reassignment and the
786 other position is permanent or temporary, with a later expiration date; or

787

788 4. The other position is outside the commuting area.

789

790 D. Wage grade employees may compete for General Schedule positions and
791 vice versa but must meet applicable legal requirements including minimum
792 qualifications requirements.

793

794 E. ~~Electronic~~ Application Forms

795

796 1. Management will afford bargaining unit employees access and instructions
797 so that they may use SSA's personal computers to complete automated
798 applications and related forms under this article. ~~Access will be granted to~~
799 ~~the extent that computers, related computer equipment and computer time~~
800 ~~are available and such use will not impede Agency operations. For~~
801 ~~purposes of this agreement~~ **Access includes a reasonable amount of**
802 **time during an employee's working hours to prepare or modify his/her**
803 **application. All time spent preparing or modifying an application is**
804 **duty time. Agency will provide one-on-one assistance to employees**
805 **who request it for the electronic application process.**

806

807 ~~4.~~ **2.** The Agency will provide appropriate training on how to file for a
808 vacancy and how to complete a SSA-45. The Agency will continue to
809 make instructional material on the promotional process available to
810 bargaining unit employees.

811

812 **3. Electronic forms will be identical to their paper counterparts and**
813 **their use is voluntary.**

814

815

816 **4. The Agency will provide a written receipt for all paper and electronic**
817 **applications for a vacancy, within 5 days after receipt of the employee**
818 **application.**

819

820 **5. Electronic applications must be received by 11:59 p.m. in the time**
821 **zone of the employee filing the application on the date of the**
822 **application closing.**

823

824 **6. All electronic vacancy announcements will remain online for at least**
825 **six (6) months after the selection.**

826

827

828 **F. Employees whose applications do not support eligibility requirements**
829 **will be notified within two (2) days of receipt by personnel and permitted to**
830 **perfect their application so as to be considered for the vacancy.**

831

832 **~~Section 9. Development of Weights and Factors~~**

833

834 ~~The Agency is responsible for developing/updating weights and factors and~~
835 ~~KSA's.~~

836

837 ~~The Agency will ensure the establishment of a valid crediting plan for FWS~~
838 ~~positions.~~

839

840 **Section 9--Development of Assessment Criteria**

841

842 **Assessment criteria used to evaluate candidates must be objective, fair,**
843 **job related, and applied equitably.**

844

845 **Assessment criteria will be developed by identifying the major tasks/duties**
846 **of the position based on information contained in the position description,**
847 **career ladder plan, qualification standards and or classification standards.**
848 **Any task examples and/or operational definitions shall be derived from and**
849 **consistent with the official position description of record and made**
850 **available to employees to assist them in the development of their**
851 **application. The task examples should not be taken as the only types of**
852 **evidence which demonstrate possession of assessment criteria.**

853

854 **All assessment criteria necessary for selection will be established by the**
855 **Assessment Panels, pursuant to the procedures outlined below. The**

856 **selecting official will communicate to the Assessment Panel any objective**
857 **factors that should be considered important for the position to be filled.**
858 **The Assessment Panel will determine how to incorporate these factors into**
859 **the assessment criteria. Such factors could be directly addressed by the**
860 **employee as part of the application or could be supported by**
861 **personal/supervisory references.**

862

863 **The basis for an award (provided in writing by the Administration when the**
864 **award was granted) must be related to the assessment criteria. Employees**
865 **should include pertinent award justification as a part of the application**
866 **process and explain the relationship of the award to the assessment**
867 **criteria.**

868

869 **A. Standard Positions**

870

871 **1. The Parties agree to establish National Joint Panels to develop**
872 **initial assessment criteria and procedures for standard**
873 **positions. Such panels will have equal union and management**
874 **members. Exact membership and mechanics will be subject to**
875 **the mutual agreement of both parties. SSA will pay all travel**
876 **and per diem for union panel members pursuant to SSA travel**
877 **regulations.**

878

879 **2. Changes to assessment criteria for specific standard positions**
880 **after initial establishment will be processed in accordance with**
881 **Article 4.**

882

883 **B. Nonstandard Positions**

884

885 **1. Assessment Panels will establish initial assessment criteria for**
886 **nonstandard positions. Informational copies will be provided**
887 **to the Union as part of the vacancy announcement.**

888

889 **Assessment Panels may revise assessment criteria for**
890 **nonstandard positions, when appropriate. If assessment**
891 **criteria for specific nonstandard positions are changed after**
892 **initial establishment and use in a promotion action, the newly**
893 **developed criteria will be sent to the Union in advance of any**
894 **future vacancy announcement.**

895

896 **C. Dispute Resolution**

897 **If agreement cannot be reached regarding assessment criteria for**
898 **any position, the Article 24 Dispute Resolution Process will be**
899 **utilized to resolve such dispute.**

900

901 **Section 10. Best Qualified List (BQL) Determinations**

902

903 ~~A. The Agency will review the applications to ensure that applicants meet the~~
904 ~~minimum qualifications for the position. Applicants must be in good standing~~
905 ~~to participate in the merit promotion process.~~

906

907 ~~B. Promotion committees, selected by management, will be convened to rate~~
908 ~~applicants against the weights and factors or KSAs. The rating will be applied~~
909 ~~consistently to all applicants.~~

910

911 ~~C. The names of the promotion committee members will be documented in the~~
912 ~~announcement package.~~

913

914 ~~D. Promotion committee members must treat the results of their work as~~
915 ~~confidential, as well as the employee information they have access to in~~
916 ~~carrying out their duties. Committee members may not provide information~~
917 ~~related to filling the vacancy to any of the applicants or to any unauthorized~~
918 ~~individual.~~

919

920 ~~E. Promotion committees will not contact applicants or solicit information from~~
921 ~~other sources regarding the applicants. Questions or concerns regarding the~~

922 ~~information provided by applicants should be referred to the personnel~~
923 ~~specialist or staff person advising the committee.~~

924

925 ~~F. After rating each applicant, the promotion committee may rank the applicants~~
926 ~~in descending score order, determine which applicants have a score which is~~
927 ~~at least 50% of the total maximum score for the entire rating schedule and~~
928 ~~develop a tentative BQL.~~

929

930 ~~G. Only applicants who earned at least 50% of the total maximum points may be~~
931 ~~considered for the BQL and referred to the selecting official.~~

932

933 ~~H. The number of candidates to be included on the BQL is determined by the~~
934 ~~number of vacancies to be filled. For one vacancy, the BQL would consist of~~
935 ~~the 15 highest ranked applicants who meet the 50% cut-off, plus ties for last~~
936 ~~place. For each additional vacancy, the BQL would include the next 5 highest~~
937 ~~ranking applicants who meet the 50% cut-off plus ties for last place.~~

938

939 ~~I. If additional vacancies arise prior to the approval of the BQL, the selecting~~
940 ~~official may request that the number of candidates referred for initial selection~~
941 ~~be based on the larger number of vacancies. Such requests will be~~
942 ~~documented in the announcement package.~~

943

944 ~~J. Separate BQ lists will be established for positions posted at more than one~~
945 ~~grade level or for more than one geographic location. The number of names~~
946 ~~referred on each list will be determined by the number of vacancies to be~~
947 ~~filled at each grade level or geographic location. If the number of vacancies~~
948 ~~to be filled at each grade level or geographic location is not specified, the~~
949 ~~number of names referred will be based on the total number of vacancies to~~
950 ~~be filled.~~

951

952 ~~K. An abbreviated rating procedure may be used when the number of~~
953 ~~candidates to be rated is no greater than the number of names that would be~~
954 ~~included on the BQL for the number of vacancies to be filled. Applicants may~~
955 ~~be rated against the entire rating schedule or may be rated only up to the~~
956 ~~point where it is apparent that the applicant would or would not receive at~~
957 ~~least 50% of the total maximum score possible under the entire rating~~
958 ~~schedule.~~

959

960 ~~L. The list will be reviewed to ensure that the correct names and number of~~
961 ~~names has been included on the tentative BQL. After review, the personnel~~
962 ~~specialist will sign the BQL to indicate approval.~~

963

964 ~~M. The approved BQL, in alphabetical order, and the applications submitted by~~
965 ~~the best qualified candidates will be given to the selecting official.~~

966

967 ~~N. Previously approved BQ lists may be amended to add the names of~~
968 ~~applicants who were erroneously excluded, provided that initial selection(s)~~
969 ~~have not been made. No names should be removed from the amended list~~
970 ~~and the cut-off scores should remain the same. In these situations, the total~~
971 ~~number of names referred may exceed the number which would normally~~
972 ~~have been provided based on the number of vacancies.~~

973

974 **Section 10--Assessment Panel**

975

976 **A. Panel Membership Requirements - Assessment Panels will be**
977 **established for all competitive actions. Assessment Panels will**
978 **usually be convened at the regional/component/headquarters level**
979 **where the vacancy is located. Panel members shall be instructed in**
980 **the tasks necessary to perform the panel's function. The panels**
981 **shall consist of:**

982 **1. Three management officials;**

983 **2. Three volunteer bargaining unit representatives with**
984 **concurrence of the Union.**

985

986 **The number of panel members may be changed by mutual**
987 **consent of the parties.**

988

989 **In order to assure that broad interests are represented, to the extent**
990 **practical, the panel should include a member from outside the**
991 **component in which the vacancy exists.**

992

993 **The parties recognize that some competitive actions may require**
994 **larger panels. The Administration may determine the necessary**
995 **panel size. However, all panels of more than six members will**
996 **consist of an equal number of bargaining unit employees and**
997 **management officials.**

998 **The method of soliciting and selecting bargaining unit volunteers**
999 **will be subject to the mutual agreement of the parties.**

1000

1001 **Panel members must not be in competition for the vacancy and**
1002 **must be at least at the same grade, or higher if possible, than the**
1003 **journey level of the vacancy to be filled.**

1004

1005 **An individual may not serve on a panel where a conflict of interest**
1006 **might exist; i.e., they must not be related by blood, adoption, or**
1007 **marriage to any applicants considered for the position. Neither the**
1008 **recommending nor selecting officials, for the position in question,**
1009 **will serve as panel members.**

1010

1011 **B. Members of the Assessment Panel should be familiar with the job**
1012 **requirements of the position(s) being filled.**

1013

1014 **C. Assessment Panel Materials - The Administration will provide the**
1015 **Assessment Panel with all of the necessary information for completing**
1016 **its function.**

1017

1018 **D. Assessment Panel Responsibilities - The Assessment Panel will:**

1019

1020 **1. Develop assessment criteria;**

1021

1022 **2. Develop an application tailored to the assessment criteria for**
1023 **the position;**

1024

1025 **3. Verify applicant information, if necessary;**

1026

1027 **4. Apply assessment criteria by reviewing and scoring the**
1028 **application rather than by the use of an employee questionnaire**
1029 **and an electronic assessment tool;**

1030

1031 **5. Identify best-qualified candidates within timeframe set by the**
1032 **selecting official. The number of best-qualified candidates on**
1033 **the best-qualified list (BQL) will consist of five plus ties for the**
1034 **first vacancy and two for each additional vacancy; and**

1035 **6. Provide input to the selecting official, if requested.**

1036

1037 **The panel may use interviews as a tool in evaluating candidates.**

1038

1039 **The panel's working notes and/or work sheets will be made a part**
1040 **of the promotion package. The notes will serve as reference**
1041 **material to document the process by which the best qualified**
1042 **candidates were identified.**

1043

1044 **E. When the selecting official has required the inclusion of a**
1045 **supervisory recommendation in the promotion package, the panel**
1046 **will obtain a managerial recommendation check off sheet with the**
1047 **options which state "does not recommend", or "recommend" for**
1048 **each candidate on the well-qualified list. The employee will be**
1049 **provided a copy of the supervisory recommendation.**

1050

1051 **F. If an announcement pertains to more than one grade level or**
1052 **geographic location, a separate group of best qualified candidates**

1053 **will be developed for each grade level and location unless agreed to**
1054 **between the parties at the component level.**

1055

1056 **G. The panel will work by consensus. The panel will use consensus-**
1057 **reaching techniques, and facilitators will be provided as needed.**

1058

1059 **H. The assessment panel's actions will be treated confidentially and in**
1060 **accordance with provisions of the Privacy Act.**

1061

1062 Section 11. Selection

1063

1064 ~~A. The selecting official may use all available information to determine the~~
1065 ~~candidate(s) who merit promotion.~~

1066

1067 ~~B. Selection interviews may be conducted with one or more of the candidates;~~
1068 ~~not all candidates must be interviewed.~~

1069

1070 ~~C. The selecting official will normally make selection(s) for the initial vacancies~~
1071 ~~within 60 calendar days of receipt of the BQL.~~

1072 **A. Once a best qualified list has been established by the Assessment**
1073 **Panel, there will be no other candidate information gathered by the**
1074 **selecting official. However, this does not preclude the selecting**

1075 **official from re-contacting the Assessment Panel and/or interviewing**
1076 **all best qualified candidates.**

1077

1078 **B. The selecting official will make selection(s) within 60 calendar days of**
1079 **receipt of the Assessment Panel's well-qualified package.**

1080

1081 **C. If the vacancy is one for which an under-representation exists and is**
1082 **a targeted occupation as identified in the Affirmative Employment**
1083 **Plan, and there are best qualified candidates who would reduce the**
1084 **under-representation, then the selecting official will give serious**
1085 **consideration to those individuals who would reduce the under-**
1086 **representation. If an under-representation is not present, then the**
1087 **selecting official will seriously consider providing upward mobility**
1088 **for those best-qualified candidates who have been stagnated in**
1089 **grade and/or position.**

1090

1091 **D. In the event that an unanticipated vacancy(s) in the same position and**
1092 **location as the posted vacancy occurs within ~~three months~~ **forty-five (45)****
1093 **days of the selection, the selecting officer may make additional selections**
1094 **from the best-qualified candidates on that list.**

1095

1096 **E. When a selection has been made, the Administration will arrange a**

1097 release date, notify the employee, and ensure that the appropriate personnel
1098 forms are processed. The effective date of a promotion action, other than
1099 promotion within a career ladder, will be the first day of the pay period in
1100 ~~which the employee is scheduled to report~~ **following the selection. An**
1101 **exception to this would be when an employee is nearing the end of a**
1102 **waiting period for a within-grade increase, consideration should be**
1103 **given to releasing the employee at the beginning of a pay period on or**
1104 **after the effective date of the within-grade increase, provided such an**
1105 **action would benefit the employee.** ~~If due to administrative error, the~~
1106 ~~personnel action was not processed in a timely manner, the promotion~~
1107 ~~effective date will be made retroactive to the beginning of the pay period in~~
1108 ~~which the employee actually reported.~~ **If an employee has been selected**
1109 **for promotion, has accepted the offer, and a reporting date has been**
1110 **established, and the resultant request for personnel action (SF-50) is**
1111 **not timely received and/or acted upon by the appointing official (SPO),**
1112 **the action shall be made retroactive to the reporting date.**

1113

1114 F. Competitive selections will be posted on the SSA Intranet. Normally, the
1115 postings will be made within 10 workdays after the close of the pay period
1116 during which the selection(s) was/were made effective.

1117

1118 **G. Employees selected for career ladder positions will be promoted to the**
1119 **next higher-grade level at the beginning of the first pay period after**

1120 **selection, provided time-in-grade and any other legal promotion**
1121 **requirements are met.**

1122

1123 **H. The Union President of each component will also receive notice.**

1124

1125 **I. Any other union official who has received vacancy notices will continue**
1126 **the past practice and receive notice as well.**

1127

1128 Section 12. Employee Information

1129

1130 ~~A. A copy of the promotion plan will be posted on SSA's Intranet site.~~

1131

1132 ~~B. Employees are entitled to the following information upon request about~~
1133 ~~vacancies filled under the competitive provisions of this article and for which~~
1134 ~~they are/were under consideration.~~

1135

1136 ~~1. Whether the employee was eligible and qualified for the position;~~

1137

1138 ~~2. How his/her points were derived;~~

1139

1140 ~~3. The cut off score for the BQL and whether the employee was included on~~
1141 ~~the BQL; and,~~

1142

1143 ~~4. The name(s) of the employee(s) who was selected for the vacancy.~~

1144

1145 **All applicants who apply for a vacancy and are not selected will be**
1146 **provided the following information within one (1) pay period after the**
1147 **selection:**

1148

- 1149 **1. Whether the employee meets minimum requirements;**
- 1150 **2. What points were awarded in each category;**
- 1151 **3. Employee's relative standing in numerical listing;**
- 1152 **4. What the Best Qualified List cutoff score was;**
- 1153 **5. Whether or not the employee was on the Best Qualified List;**
- 1154 **6. The name of the employee selected for the vacancy;**
- 1155 **7. Reason the employee was not selected; and**
- 1156 **8. In what areas, if any, they can improve to increase their chances**
1157 **for future selection to the position in question.**

1158

1159 Section 13. Union Review of Competitive Actions

1160

1161 A. The Union will be permitted to **conduct audits of promotion packages for**
1162 **all bargaining unit positions** ~~review (i.e. audit) competitive selection actions~~
1163 ~~taken under this Article~~ when it has reason to believe a discrepancy exists or
1164 when requested to do so by an employee. **This may be done at any time**

1165 **after the vacancy announcement posting; up to 6 months after selection**
1166 **is made.**

1167

1168 B. The Union will ~~make the request to the Agency's labor relations officer. The~~
1169 ~~Union will provide the Agency's labor relations officer with an updated written~~
1170 ~~designation identifying~~ **provide the Agency with** the names of the Union
1171 representatives who are responsible for conducting audits. Any changes to
1172 the list of designated representatives will be sent to the Agency in writing.
1173 The representative designated to conduct the audit will not have been an
1174 applicant for the promotion package being audited.

1175

1176 C. Employees who believe they were improperly excluded from **inclusion as**
1177 **best qualified** ~~consideration~~ may request a review of the promotion package
1178 through the Union ~~review~~ process described below.

1179

1180 D. If the employee chooses to use the Union procedure, he/she must make a
1181 written **or oral** request to the Union ~~within~~ **during the period from the date**
1182 **the eligibles are referred to the assessment panel up to** 15 working days
1183 after the selection is announced to all employees. A Union request under
1184 Subsection (A.) above ~~must be made within 45 days.~~ **may be made from the**
1185 **date of the posting of the vacancy to 6 months following the date of**
1186 **selection.**

1187

1188 E. ~~The Agency will make the pertinent records from~~ **designated official**
1189 **responsible for** the package **will make all paper and electronic records,**
1190 **e.g. spreadsheets, questionnaires, applications, etc. from that package**
1191 available to the Union auditor within 7 working days of receipt of the written
1192 request. The Union will treat the information confidentially. **Promotion**
1193 **packages may be reviewed either onsite at the servicing personnel**
1194 **office or via mail. If the Agency requires onsite review, travel and per**
1195 **diem for the auditor(s) shall be paid by the Agency.**

1196

1197 F. If during the course of the audit additional information is determined
1198 necessary, such information shall be secured from the Agency's designated
1199 Management official.

1200

1201 G. If an error is discovered which resulted in an employee's exclusion from a
1202 BQL, the provisions of Section 14 of this article will apply.

1203

1204 H. Employees who elect to use the grievance procedure rather than the Union
1205 audit procedure must initiate action in accordance with Article 24, Grievance
1206 Procedure.

1207

1208 **Section 14. Priority Consideration and Other Relief**

1209

1210 A. Definition - For the purpose of this Article, a priority consideration is the
1211 genuine consideration for non-competitive selection given to an employee as
1212 the result of a previous failure to properly consider the employee for selection
1213 because of procedural, regulatory or program violation. ~~Employees will~~
1214 ~~receive one priority consideration for each instance of improper consideration.~~
1215 ~~A priority consideration does not give the employee a right or a guarantee to~~
1216 ~~be selected for any vacancy.~~

1217

1218 B. Processing

1219

1220 ~~1. Employees will be notified in writing by the authorized Management official~~
1221 ~~of entitlement to each priority consideration. Such notice will advise~~
1222 ~~employees that if a vacancy is announced and posted and the employee~~
1223 ~~wishes to exercise his/her priority consideration, he/she should submit the~~
1224 ~~necessary application to the designated Agency human resources official~~
1225 ~~with a written request that he/she wishes priority consideration for the~~
1226 ~~vacancy.~~

1227

1228 ~~2. Priority consideration is to be exercised by the selecting official at the~~
1229 ~~option of the employee for an appropriate vacancy. An appropriate~~
1230 ~~vacancy is one for which the employee is interested, is eligible, and that~~
1231 ~~leads to the same grade level as the vacancy for which proper~~
1232 ~~consideration was not given.~~

1233

1234 ~~3. Prior to the evaluation of other applicants, the name(s) of the employee(s)~~
1235 ~~requesting to exercise priority consideration will be referred to the~~
1236 ~~selecting official. The selecting official will make a determination on the~~
1237 ~~request prior to evaluating other applicants.~~

1238

1239 ~~4. The fact that the employee chooses to exercise a priority consideration~~
1240 ~~does not preclude that employee from also filing an application through~~
1241 ~~the regular posting process.~~

1242 **B. Eligibility. The following employees will receive priority consideration**
1243 **in accordance with the procedures set forth.**

1244

1245 **1. Where the employee was improperly excluded from the Best**
1246 **Qualified List, the employee will receive priority consideration.**
1247 **An employee is entitled to only one priority consideration for**
1248 **noncompetitive promotion for each instance in which he/she**
1249 **was previously denied proper consideration.**

1250

1251 **2. If the action taken to correct an erroneous promotion was to**
1252 **require that the position be vacated, employees who were not**
1253 **promoted or given proper consideration because of the**
1254 **violation (that is, employees in the best qualified group who**
1255 **were not selected or employees who should have been in this**

1256 **group but were not) will be considered for promotion to the**
1257 **vacated position before candidates are considered under a**
1258 **new promotion or other placement action.**

1259

1260 **3. The following employees will receive priority consideration in**
1261 **accordance with the procedures set forth below. Employees**
1262 **under these provisions will receive a priority consideration for**
1263 **each grade for which they were demoted or downgraded.**

1264

1265 **a. Employees who are in a retained grade status under**
1266 **Title VII of the Civil Service Reform Act as a result of**
1267 **action taken in the Administration and who:**

1268 **(1) Are serving on a full-time basis under career or**
1269 **career-conditional appointments at GS-15 or**
1270 **below, or a wage equivalent, in the competitive**
1271 **service; or**

1272

1273 **(2) Are serving under excepted career or excepted**
1274 **career-conditional appointments (except that**
1275 **their eligibility for priority selection**
1276 **consideration is limited to positions which can**

1277 **be filled under the same excepted authority as**
1278 **the one used for their appointment); or**

1279

1280 **(3) Are career or career-conditional employees**
1281 **serving on a part-time basis (except that their**
1282 **eligibility for priority selection consideration is**
1283 **limited to other part-time assignments).**

1284

1285 **a. Employees who were downgraded without**
1286 **personal cause; i.e., where downgrade was not**
1287 **due to misconduct, inefficiency, or at the**
1288 **employee's own request. Re-promotion may be**
1289 **made to a grade previously held on a non-**
1290 **temporary basis or to an intervening grade.**
1291 **This applies only when the employee was**
1292 **downgraded in the Administration and the re-**
1293 **promotion is to a grade formerly held in the**
1294 **Administration.**

1295

1296 ~~C. Union Notification~~

1297

1298 ~~In order to assure compliance with this section, the Union will be furnished~~
1299 ~~statistics on priority considerations granted and exercised and the results.~~

1300 ~~Statistics will be kept and supplied to the Union on a quarterly basis. The~~
1301 ~~Union will also be notified in writing of each individual priority consideration~~
1302 ~~completed.~~

1303

1304 **C. Processing**

1305 **The procedures for processing a priority consideration(s) shall be:**

1306

1307 **1. Employees will be notified in writing by the authorized**
1308 **management official of entitlement to each priority**
1309 **consideration. Such notice will advise employees that if a**
1310 **vacancy is announced and posted or if additional selections**
1311 **will be made from the current BQL, the employees who wish to**
1312 **exercise their priority consideration should submit the**
1313 **necessary application to the Servicing Personnel Office with**
1314 **written request that they wish priority consideration for the**
1315 **vacancy.**

1316

1317 **2. Priority consideration is to be exercised by the selecting officer**
1318 **at the option of the employee for an appropriate vacancy(s). An**
1319 **appropriate vacancy is one for which the employee is**
1320 **interested, is eligible, and which leads to the same grade level**
1321 **of the vacancy for which proper consideration was not given,**
1322 **or for which an employee was denied.**

1323

1324 **3. Prior to the referral of eligible candidates to the assessment**
1325 **panel, the name(s) of the employee(s) requesting to exercise**
1326 **priority consideration will be referred to the selecting officer.**
1327 **The selecting officer will make a determination on the requests**
1328 **prior to the assessment panel's evaluation of any other**
1329 **candidates for the vacancy.**

1330

1331 **4. Employees who are selected by exercise of priority**
1332 **consideration will be promoted or reassigned non-**
1333 **competitively and will be notified promptly by the selecting**
1334 **official prior to the assessment panel's evaluation of any other**
1335 **candidates for the vacancy.**

1336

1337 **5. Employees who are not selected by exercise of priority**
1338 **consideration will be notified in accordance with Section 14D of**
1339 **this Article.**

1340

1341 **6. The fact that the employee chooses to exercise a priority**
1342 **consideration does not preclude that employee from also filing**
1343 **an application as specified in the vacancy announcement.**

1344

1345 **D. The selecting official must justify in writing any non-selection**
1346 **under this section. The employee will be given 10 days to rebut**
1347 **the reasons for non-selection and will receive a written response**
1348 **to the rebuttal. During this rebuttal period, the vacancy will**
1349 **remain open.**

1350

1351 **E. Union Notification.** In order to assure compliance with this section, the
1352 Union will be furnished statistics on priority considerations granted, ~~and~~
1353 exercised, and the results. Statistics will be kept and provided to the Union
1354 on a quarterly basis. **Statistics will clearly identify the result of each**
1355 **individual priority consideration granted and exercised.** The Union will
1356 also be notified in writing of each individual priority consideration
1357 completed.

1358

1359 ~~**Section 15. Temporary Promotions**~~

1360

1361 ~~When employees are temporarily assigned to a position of a higher grade for a~~
1362 ~~period in excess of 30 days, the assignment must be made via temporary~~
1363 ~~promotion effective the first day of the assignment.~~

1364

1365 **Section 15. Announcement of Selections**

1366

1367 **A. Competitive selections will be announced by posting**
1368 **announcements on designated bulletin boards at the location where**
1369 **the vacancy was filled and by electronic mail to each applicant who**
1370 **applied for the vacancy. In addition, the Agency will post all**
1371 **selections on the Intranet which will be retained for six (6) months.**
1372 **Normally, such announcements will be made within 10 workdays**
1373 **after the close of the pay period during which the selection(s) were**
1374 **made effective.**

1375

1376 **B. The Union president of each component will also receive notice**
1377 **within the timeframes list in A.**

1378

1379 **C. Any other union official who has received selection notices will**
1380 **continue the past practice and also receive this notice within the**
1381 **timeframes listed in A.**

1382

1383 **Section 16. Temporary Promotions**

1384

1385 **A. Employees detailed or constructively detailed to a higher graded**
1386 **position/duties for a period of more than ten (10) consecutive**
1387 **calendar days must be temporarily promoted. The employee will**
1388 **be paid for the temporary promotion beginning the first day of the**

1389 **detail. The temporary promotion should be initiated at the earliest**
1390 **date it is known by management that the detail is expected to**
1391 **exceed ten (10) calendar days. The ten (10) calendar day**
1392 **provision will not be circumvented by rotating employees into a**
1393 **higher graded position for less than ten (10) calendar days in**
1394 **order to avoid the higher rate of pay. For the purposes of this**
1395 **section, a General Schedule employee who performs the grade**
1396 **controlling duties of a higher graded position for at least 25% of**
1397 **their time, or a Wage Grade employee who performs higher**
1398 **graded duties on a regular and recurring basis, shall be**
1399 **temporarily promoted.**

1400

1401 **B. Temporary promotions in excess of ten (10) calendar days shall**
1402 **be filled through competitive procedures. Temporary promotions**
1403 **of ten (10) calendar days or less shall be made in accordance with**
1404 **Article 27 among qualified employees.**

1405

1406 **C. The Union President of each component will receive notice of all**
1407 **temporary promotions within the timeframes listed in Section 15A.**

1408

1409 **D. Any other Union official who has received notices will continue to**
1410 **receive them pursuant to past practice. Such notices will be distributed**
1411 **within the timeframes listed in Section 15A.**

1412

1413 **Section 17. Miscellaneous**

1414

1415 **A. Personnel Data Summary – An Employee Qualifications Form will be**
1416 **prepared by the Employer and distributed to all unit employees**
1417 **every two years. However, employees may receive a copy at any**
1418 **time upon request in order to verify and update the listing.**
1419 **Employees will be given a reasonable amount of duty time to review**
1420 **and update the information shown.**

1421

1422 **B. Vacancy announcements and career ladder plans will include a 52**
1423 **week time-in-grade requirement.**