

American Federation of Government Employees

AFFILIATED WITH THE AFL-CIO

Local 2505

Ralph C. de Juliis
President



Carol A. Lewis
Executive Vice President

29 January 2009

ARBITRATION INVOCATION

Ms LaVerna Williams, District Manager
Social Security Administration
2615 Villa Prom
Oklahoma City, OK 73160

Dear District Manager Williams:

By this letter, AFGE invokes arbitration on the Union's January 13, 2009 Section 10 grievance regarding the failure of the Oklahoma City SSA Field Office to purge employees' SF-7B Extension Files.

I will be the Union's representative for this arbitration.

Thank you!

Ralph C. de Juliis

cc: AFGE Local 2505 Executive Board

c/o Social Security Administration
4750 South Garnett Road ♦ Tulsa, Oklahoma 74146-5233
VOICE: (918) 641-2409 Ext. 2923 ♦ CELL: (918) 781-3096 ♦ FAX: (918) 641-2446
SSA E-mail: ralph.dejuliis@ssa.gov ♦ Internet E-mail: ralph.de.juliis@sbcglobal.net

Social Security Administration
Oklahoma City District Office
January 28, 2009

Ralph De Juliis
Local President, AFGE Local 2505
4750 South Garnett Road
Tulsa, Oklahoma 74146-5233

Dear Mr. De Juliis,

This is a response to your Article 24, Section 10 Union Management Grievance filed on January 13, 2009 regarding the alleged failure of the Oklahoma City, Oklahoma field office to purge employee's SF-7B extension files. Since this issue only pertains to the Oklahoma City, OK SSA Office, I'm the appropriate official to respond to this grievance. In the grievance you cite a violation of Article 3, Sections 2.A, 5.B and C. You seek the following remedies verbatim: (1) OKC management purge the SF-7B [sic]Extension files and (A) give the outdated material to each employee or (B) inform me when the employees' SF-7B [sic]Extension files have been purged so that I can visit the Oklahoma City office and personally inspect every employee's (regardless of whether the employee consents to me seeing [sic]their SF-7B [sic]Extension [sic]File or not) SF-7B [sic]Extension file to insure it has been purged. (2) SSA send an email to all [sic]Managers in OK with an open cc to me as the Union [sic]President reminding them of their obligations under Article 3, Section 5B and C. (3) A written promise that SSA will [sic]Cease and [sic]Desist from following Article 3, Section 5B and C.

Per instructions from Central Office, management will continue to comply with special retention instructions for certain AFGE bargaining unit employees' ratings of record and related documents. Supervisors should retain all ratings of record and related documents for the 1991, 1992, 1993 and 1994 appraisal years (October 1, 1990 to September 30, 1994) in the extension files until further notice.

Management will continue to comply with the AFGE 2005 Contract and purge the files of the employees in the Oklahoma City, OK field office. To ensure extension files only contain timely and relevant material, management does periodically purge old, obsolete documents. Supervisors are required to perform this maintenance, at a minimum, once a year, normally in February or March. This year will be no exception. Management of the Oklahoma City office will review the records retention schedules in Exhibit 1 and Exhibit 2 of S293_4 of the Personnel Policy Manual (PPM) to insure proper documents are being purged. All purged documentation will be given to the employee.

Management considers this matter resolved and closed.

LaVerna Williams
District Manager
Oklahoma City, OK SSA Office



SOCIAL SECURITY

January 22, 2009

Sent via fax to (918) 641-2446

Ralph C. de Juliis, President
AFGE Local 2505
4750 South Garnett Road
Tulsa, Oklahoma 74146-5233

Dear Mr. de Juliis:

This is regarding the union-management grievance filed pursuant to Article 24, Section 10 on January 13, 2009. These issues pertain only to the Oklahoma City, OK Social Security Administration (SSA) Office. Therefore, I have delegated the grievance to La Verna Williams, District Manager of the Oklahoma City, OK SSA Office. She will be contacting you shortly to proceed with the grievance process. If you have any questions, please call Dana Callahan in Management Operations Support at (214) 767-0290.

Sincerely,

Ramona Schuenemeyer
Regional Commissioner

cc: Dianne Vaughn, Area Director, Area VII
La Verna Williams, District Manager, Oklahoma City, Oklahoma

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13 January 2009

Ms Ramona J. Schuenemeyer
Regional Commissioner - Dallas Region
Social Security Administration
1301 Young St., STE 130
Dallas, Texas 75202

BY FAX: (214) 767-4259

Dear Regional Commissioner Schuenemeyer:

By this letter, AFGE Local 2505 files a Section 10 grievance over the failure of the SSA Field Office in Oklahoma City to purge employee's SF-7B Extension Files.

I was in OKC on Friday, January 9, 2009. I asked to review and copy an employee's SF 7B Extension File. The employee consented. For starters, the file contained the employee's appraisal going back to 1994. It contained sanctions and PII statements signed by the employee going back to 2004. It contained documentation of participation in workshops going back to 2004. It contained her SF 85 from 2006. It contained performance documentation from 2004.

By failing to timely purge, SSA has violated Article 3, Sections 2.A, 5.B and C.

The Union seeks the follow remedies: (1) OKC management purge the employees' SF-7B Extension files and (A) gives the outdated material to each employee or (B) inform me when the employees' SF-7B Extension files have been purged so that I can visit OKC and personally inspect every employee's (regardless of whether the employee consents to me seeing their SF-7B

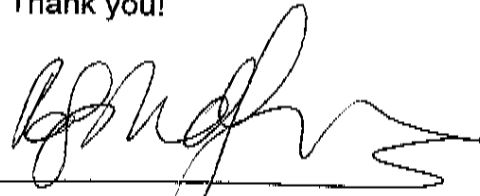
c/o Social Security Administration
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Extension File or not) SF-7B Extension file to insure it has been purged. (2) SSA send an email to all Managers in OK with an open cc to me as the Union President reminding them of their obligations under Article 3, Section 5B and C. (3) A written promise that SSA will Cease and Desist from following Article 3, Section 5B and C.

I would like to explain my first remedy. When I asked the DM in Lawton for a copy of the 5510 which was supposed to have been done by the end of October, the Lawton DM, Kelly Ruffridge deleted my email without reading it. I followed up with Regional LMR instead of filing a ULP. Instead of getting the 5510, I received an email telling me it was given to the Local Rep and I could get it from the Local Rep; AND, oh, by the way, Happy New Year. That was pretty cheeky and disrespectful. So, I don't want a resolution in which SSA tells me it purged the material but won't let me see the employees' files without their expressed consent. SSA can either give the material to the employees (and I can blast them all with an email asking if they received material); or, in the alternative, SSA can purge outdated material without giving it to the employees, but, then, must permit me to inspect the files for myself, whether or not the employees consent or even know.

The Union waives its right to make an oral presentation of this grievance.

Thank you!



Ralph C. de Juliis
AFGE Local 2505

cc: Local 2505 Executive Board

TRANSMISSION REPORT

(TUE) JAN 13 2009 12:34

ACCOUNT NAME :
DESTINATION : 912147674253
DEST. NUMBER : 912147674253
F-CODE :

DOCUMENT# : 6802058-938
TIME STORED : JAN 13 12:29
TIME SENT : JAN 13 12:33
DURATION : 35sec
MODE : ECM

PAGES : 4 sheets
RESULT : OK

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Ms Ramona J. Schuenemeyer
Regional Commissioner - Dallas Region
Social Security Administration
1301 Young St., STE 130
Dallas, Texas 75202