

## AT&T SE Surplus Orientation Package

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## Introduction

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### Overview

Such things as technological change, changes in operations, and/or centralization, may necessitate a reduction in the number of regular employees. This may result in what is known as a surplus force condition.

All available options and related items will be covered in detail. This Surplus Orientation Package will guide you through the process and help you make your decisions. As we go through the guide, you will be given the opportunity to ask questions as each topic is covered.

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### Roles and Responsibilities

Each employee plays a significant role in this process:

- As the affected employee you will have important decisions to make in the days ahead. You will be provided with the necessary information and options available to make these choices.
  - Your Staffing Manager will guide you through the Surplus Orientation Package, alerting you to important dates, advising you of different options that are available and providing you with answers to your questions.
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### Available Options

The options we will cover are:

- Current vacancies within state
  - Supplemental Income Protection Program (SIPP), including Expanded Supplemental Income Protection Program (ESIPP)
  - Leaves of Absence (Sabbatical, Technological, Transitional)
  - Bumping Rights
  - PARTNERSHIP Job Bank
  - Termination Allowance
  - Job Offer Guarantee (JOG)
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## Introduction, Continued

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**Items Related  
to the Options**

In addition, there are items related to the available options that will also be covered which are:

- Testing
  - Reassignment Pay Protection Plan (RPPP)
  - Return Rights
  - Recall Rights
  - Pensions
  - Career Resource Center (CRC)
  - PARTNERSHIP Job Bank
  - Relocation
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# AT&T SE SURPLUS ORIENTATION PACKAGE

## Timeline

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### **Surplus Timeline**

When a surplus condition exists, your departmental personnel will notify Labor Relations and coordinate the displacement date. Labor Relations sends the official surplus notification to CWA on the 15<sup>th</sup> of the month prior to the beginning of the surplus quarter.

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### **Surplus Notification**

Your department will notify you of the surplus condition.

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### **Upfront Placements**

Once Staffing is notified of the surplus, we will try to place surplus employees with the following steps:

- Job assignments within the Family of Skills within 35 miles
  - ESTW (Essentially Same Type of Work) SIPP within 35 miles
  - Same Title SIPP within 35 miles
  - Vacancies within 35 miles
- 

### **Surplus Orientation Meeting**

If we are not able to satisfy the surplus with these three steps, a Surplus Orientation Meeting will be scheduled by the Staffing Manager for remaining surplus employees and potential bumpees. A PARTNERSHIP Representative will participate in the meeting.

You will be given a Surplus Orientation Package and be advised of all the available options.

From the day of your Surplus Orientation Meeting, you will have 5 calendar days to rank your options on the Master Ranking Sheet and return the form by fax to the Staffing Manager.

From the day of your Surplus Orientation Meeting, you will have 10 calendar days to complete any necessary testing requirements Please refer to the Testing section of this package and the Test Matrix.

You will also be advised of the surplus displacement date.

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## Surplus Options

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### **Surplus Options**

You have been affected by this surplus either because you have been declared surplus or because you are a potential bumpee. We will go over the Article 7 surplus process and explain all of your Stay-on-Payroll and Exit Options.

#### **Your Stay-on-Payroll Options are:**

- Vacancies
- SIPP/ESIPP
- Bumping

#### **Your Exit Options include:**

- SIPP
  - Leaves of Absence
  - PARTNERSHIP Job Bank
  - Termination Allowance
  - Job Offer Guarantee (JOG)
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## Vacancies

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### Vacancies

As a surplus employee, you will be grouped in seniority order with other priority candidates and given priority consideration for vacancies for equal and lower in wage scale, first within your exchange and 35 miles and then within your state.

Listed below are some things to consider regarding vacancies:

Threshold requirements must be met for the position, such as testing. If you choose to rank a vacancy or bumping option, which requires testing, you must schedule yourself and be tested within 10 calendar days from the surplus meeting. Otherwise, you will not be considered for those vacancies or bumping options. Please refer to the Testing section of this package and the Test Matrix.

If you take a job in a lower wage scale, you will be covered under the Reassignment Pay Protection Plan (RPPP) (8.03B & C).

If you take a lower wage scale position, you will be pension-band protected for a period of 5 years.

If you take a position located in an exchange over 35 miles from your current exchange, and you relocate your residence, you're entitled to relocation expenses which are outlined in Article 9 - Transfer and Travel Expense of the Working Agreement.

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## Supplemental Income Protection Program (SIPP)

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### Overview

Employees may lock/unlock electronically in the Career Resource Center (CRC) from the 1<sup>st</sup> day of the month to the last day of the month, before midnight, Eastern Standard time, preceding the surplus quarter. After this time, the SIPP acceptance cannot be revoked by the employee.

Acceptances will be valid for one quarter only. Employees must lock in during the specified time period.

In a surplus situation, SIPP will first be granted in seniority order to any employees who are performing essentially the same type work, first in the surplus exchange and then exchanges within 35 miles of the surplus exchange. Next, SIPP will be granted in seniority order to any employees in the same title, first in the surplus exchange and then exchanges within 35 miles of the surplus exchange.

Employees who continue to be surplus after this step will have the opportunity to take SIPP as an Exit Option.

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### Definition of SIPP

If the employee has at least 1 year of service, he/she may take SIPP. SIPP is a voluntary separation plan and if the employee takes SIPP, he/she has NO recall rights back to their Working Agreement as outlined in Article 7.02 of the Working Agreement. The SIPP payment table is in Article 8.04A3a.

There are several payment options for SIPP:

- Lump sum
  - Two equal payments, ½ paid within one month from the employee's exit from the payroll date and the other 1/2 paid in February of the following calendar year.
  - 48 monthly payments, which are paid biweekly. The employee will be taxed at the rate of his/her W4 withholding form.
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## Supplemental Income Protection Program, Continued

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**Definition of  
SIPP  
(continued)**

**Important Note:** If the employee is pension eligible and retires with less than 30 years service, his/her pension will be discounted ½% for each full or partial month (6% for each year) of retirement before age 56.

Service pension eligibility is:

<u>Age</u>	<u>NCS</u>
any age	30 years
50	with at least 25 years
55	with at least 20 years
65	with at least 10 years

**Any questions about your benefits should be referred to the Benefits Service Center.**

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## Expanded Supplemental Income Protection Plan (ESIPP)

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**Overview**

ESIPP is used in both Economic and Technological/Operational Efficiency surplus. An ESIPP position is created when an employee in the exchange or within 35 miles, in an equal or lower rated title, agrees to leave the payroll with SIPP. The surplus employee will still be required to meet any threshold requirements for these positions. If the position is to a lower wage scale, the provisions of RPPP would apply.

ESIPP will not be offered to a position that has extensive training in excess of 14 weeks. (7.01C4b)

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**Optional ESIPP Request**

The surplus employee may select up to two equal or lower rated title in his/her Family of Skills in any exchange over 35 miles from his/her current exchange (within the organizational unit), anywhere in the Company. The Family of Skills is in Appendix A, Part III, of the Working Agreement.

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## Vacancies in Other Entities

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### **Vacancies in Other Entities**

Surplus employees, who are not able to be placed within their Working Agreement, may choose to be considered for vacancies in other entities within the state. Listed below are some items to consider if the employee accepts a vacancy in another entity:

- The surplus employee's work performance, attendance, and disciplinary records will be reviewed and must be satisfactory in order to be selected.
  - The surplus employee will be required to meet all threshold requirements for these positions.
  - A move to another entity is considered to be an employee-initiated move.
  - The surplus employee will be held to time-in-title.
  - The surplus employee will not be entitled to RPPP or Relocation.
  - Return Rights only apply if the move is to a lower level job or another exchange in AT&T Billing SE or Utility Operations. (7.01K) (For Return Rights associated with moves within BST, see Page 10 of this document.)
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## Leaves of Absence

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### **Transitional Leave**

Transitional Leaves are available to regular full-time employees who will be eligible for a service pension within three years and who are affected by a surplus/PMR situation. A Transitional Leave may be combined with SIPP. SIPP payments are made the month following the beginning of the leave.

A Transitional Leave can be taken for a minimum of 31 days and a maximum of 36 months. Employees must retire at the end of the leave and return rights do not apply. While on this leave, employees receive company paid medical, dental, vision and group life benefits, and they may receive up to \$3,000 in tuition aid.

Employees on Transitional Leave may work for another employer, subject to certain restrictions. The pension amount is based on the years of service at the beginning of the leave. Any applicable discount is based on service at the beginning of the leave and age at the end of the leave. Pension calculation following a Transitional Leave (see example below):

#### **EXAMPLE:**

A 48-year-old nonmanagement employee with 29 years of service takes a Transitional Leave for 12 months.

The employee's pension calculation will be based on his actual pension service credit before the leave - 29 years and his age at the end of the leave, if he takes an immediate payment of his pension - 49 years.

Using the basic formula under the BellSouth Pension Plan in which age 56 is the current non-discount age for pensions, the employee's pension will be discounted by 42 percent.

$(56 \text{ years} - 49 \text{ years}) \times 6\% = 42\%$

To view more detailed information on Leaves of Absence, visit [HROneStop](#). From the HR Quick Reference Link, search alphabetically for Leaves of Absence.

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## Leaves of Absence, Continued

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### **Sabbatical Leave**

A Sabbatical Leave is an unpaid leave of absence, which may be taken for a minimum of nine months and a maximum of 24 months.

Regular employees with five or more years of net credited service who are affected by a surplus/PMR (Permanent Medical Restriction) situation are eligible.

EXCEPTIONS: If you have forfeited your right to termination pay, the Sabbatical Leave is no longer an option. Upon return to work from a Sabbatical Leave, an employee must work 5 years before applying for another Sabbatical Leave.

While on this leave, employees receive company provided medical, dental, vision and group life benefits, and they may receive up to \$3,000 per year in tuition aid.

Employees on a Sabbatical Leave may work for another employer, subject to certain restrictions.

Employees do not receive seniority/service credit or pension service credit for the leave period. However, the leave period does count in determining any termination pay due an employee as the result of a surplus situation.

At the expiration of a Sabbatical Leave, employees receive priority consideration for equal or lower level vacancies within their exchange. Employees are entitled to the PARTNERSHIP Job Bank (includes termination pay) or termination pay in a lump sum at the expiration of the leave if they receive no offer for an equal level job.

To view more detailed information on Leaves of Absence, visit HROneStop. From the HR Quick Reference Link, search alphabetically for Leaves of Absence.

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## Leaves of Absence, Continued

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### **Technological Leave**

A Technological Leave is an unpaid leave. This leave is only available to employees in connection with a Technological/Operational Efficiency declared surplus. Employees may be granted a Technological Leave for 12 months initially and can renew the leave for an additional 12 months.

Employees receive company paid group life benefits during the period of the leave. Employees may continue medical, dental and vision coverage at their own expense.

While on this leave, employees receive priority consideration for equal and lower level vacancies in their exchange. Termination allowance can be requested at any time during the leave.

To view more detailed information on Leaves of Absence, visit [HROneStop](#). From the HR Quick Reference Link, search alphabetically for Leaves of Absence.

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## Bumping

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### **Bumping Guidelines**

A surplus employee who receives no equal level job offer will have the option to bump a junior employee. The employee will have the possibility of 3 different bump lists (7.01C4c) and may rank the jobs from all lists in any order they choose.

- 35 Mile List (exchange and exchanges within 35 miles)
  - State Title List
  - State Family of Skills List
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## Testing

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**Introduction** You will be required to meet any testing requirements for placement. Specific testing requirements for each job title are listed on the Nonmanagement Job Title/Test Matrix which is available online at: [https://intra.att.com/hronestopadmin/doc/Nonmgmt\\_Test\\_Matrix\\_Southeast.pdf](https://intra.att.com/hronestopadmin/doc/Nonmgmt_Test_Matrix_Southeast.pdf).

Retest intervals are also provided on the Test Matrix.

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**Guidelines** You will have 10 calendar days from the date of your Surplus Orientation Meeting to complete the testing requirements.

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**Pearson Vue Login Procedure** Go to <http://www.pearsonvue.com/att>. Click on any test name, and you will be taken to the log in screen. At the log in screen enter att plus your Username, which is your AT&T Unique Identifier (ATTUID). To find your ATTUID go to WEBPHONE, and enter your first and last name in the spaces provided. Your ATTUID appears directly under your last name. Once you have obtained your ATTUID, go back to the PearsonVue login screen and, enter your ATTUID for your username, then enter your password, which is your ATTUID. When you have successfully logged onto the system you are testing options will be displayed. Select the test (s), location, and testing time that will best suit your needs. Once you have selected a testing location, directions to the location of your choice will be displayed. After you've completed testing, your results will be displayed on your computer screen, and you will have an opportunity to print a copy. If you have questions regarding Web-based scheduling, you may call the Testing Hotline at 1-888-850-4609.

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## Return and Recall Rights

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### Return and Recall Rights

#### **Return Rights (7.01K)**

If the surplus employee takes a lower level job in his/her exchange, or an equal or lower level job, in another exchange, the employee will have return rights for a period of **5 years**. The employee may have only one “return right” request on file at a time. (For Return Rights associated with moves to other entities, see Page 10 of this document.)

***IMPORTANT:*** In order to exercise the return rights, the employee **must** submit his/her request through the Career Resource Center on the web.

The rejection of a 7.01K request shall discharge the Company of any further obligations.

#### **Recall Rights (7.02)**

If the surplus employee is forced to leave the payroll, the employee will have recall rights for a period of **4 years**. He/she may submit up to 6 requests for equal or lower rated titles anywhere in the Company. The employee must submit these requests through the Career Resource Center via the web. If offered a position that is equal or lower rated and he/she declines the offer, the Company will be discharged from the recall obligation. If recalled within 4 years from the date of his/her layoff, the employee will have the continuity of his/her service protected, including seniority, and if his/her layoff was not more than 6 months duration, he/she will be allowed service and seniority credit for such a layoff unless it began within 12 months of a previous layoff. He/she must meet any threshold requirements for these positions.

***Note:*** Laid off employees who are subsequently rehired into a higher rated title and who are unsuccessful within the first six months, will retain their 7.02 recall rights to their original laid off position. Recall rights will be valid for 4 years from the date of original layoff. (7.02A12)

## Job Offer Guarantee (JOG)

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**Introduction** The Job Offer Guarantee (JOG) is a commitment between the Company and the Union that guarantees employment security from involuntary layoff to qualified surplus regular employees.

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**Guidelines** Surplus employees will have the option of a Job Offer Guarantee to a nonmanagement vacancy within the following BellSouth Working Agreements:

- BellSouth Telecommunications
  - AT&T Billing Southeast, LLC
  - Utility Operations
  - National Directory and Customer Assistance
  - BellSouth Internet Services
  - BellSouth Advertising and Publishing
- 

**Questions and Answers**

Q: How do you qualify for the Job Offer Guarantee?

A: Employees must meet the following qualifications to elect JOG:

- Rank all stay on payroll options, excluding bumping.
  - Has not declined any vacancy or position offered during the surplus quarter including promotional moves. This also includes follow your work options which could have been offered prior to the surplus quarter.
  - Qualify on the Job Fit Inventory (JFI) or the replacement of the test. Employee must be test qualified within 10 days following the surplus coverage meeting.
  - Meet expectations of current job and must be satisfactory on their most recent six month or yearly performance evaluation.
  - If employee elects to participate in JOG and does not qualify on the Job Fit Inventory test, he must choose one of the exit options at the time Staffing contacts them.
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## Job Offer Guarantee (JOG), Continued

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**Questions and  
Answers**  
(continued)

Q: If made an offer under JOG, how long do I have to decide to accept or decline?

A: Employees will have 48 hours to accept or reject the offer.

Q: What contractual rights do I retain if I accept a JOG offer?

A: If accepting a JOG offer in BST, AT&T Billing Southeast, LLC, or Utility Operations, you will retain 7.01K return rights, be entitled to RPPP under Article 8, and relocation under Article 9. (This is not applicable for employees selected for vacancies to any other entities under 7.01M.) If accepting a JOG offer in any of the other Working Agreements 7.01K Return Rights, RPPP and Relocation are NOT applicable.

Q: What happens if I decline a JOG offer?

A: Declining an offer fulfills the Company's obligation under JOG. This includes equal, lower and promotional positions.

Q: If I decline a JOG offer, am I still entitled to Partnership Job Bank?

A: No. You will be entitled to termination pay under Article 8, **OR** if you are within three years of pension eligibility you may elect to take a Transitional Leave with SIPP (SIPP cannot be combined with termination pay).

Q: How are my benefits affected if I decline a JOG offer?

A: You will still be entitled to extended medical benefit coverage under the provisions of Article 8.

Q: If I decline a JOG offer will I still have Recall rights?

A: Yes, you will retain your 7.02 Recall from Layoff rights.

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## Job Offer Guarantee (JOG), Continued

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**Questions and  
Answers**  
(continued)

- Q: When would I leave the payroll after rejecting a JOG offer?
- A: You will be terminated from the payroll at management's discretion. Prior to the termination date, the employee may elect to take any unused earned time off, if available. Employee will be paid in lieu of for any remaining vacation.
- Q: What happens if I refuse to test for a position offer under JOG?
- A: Refusal to test for a position offered under JOG is considered as a declination.
- Q: What if I have not received a JOG offer by the displacement date?
- A: You will remain on the payroll and shall be assigned any work, first, within any job title in your exchange or within 35 miles, and then within the state or BellSouth region.
- Q: How will being loaned to another position while waiting for a JOG offer affect my pay?
- A: If you are loaned to a position in an equal or lower wage scale, you will continue to be paid at your current rate of pay. If you are placed in a higher wage scale position you will be paid in accordance with Article 4.07.
- Q: If I am loaned to a position outside my exchange, how will I be compensated?
- A: This will be handled under Article 9.02.
- Q: If I am waiting on a JOG offer and decide that I would rather leave the payroll, what are my options?
- A: You can opt out of the JOG and receive your termination pay.
- Q: If the Company loans me to a position that I do not wish to do, do I have the right to refuse the assignment?
- A: No
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## Ranking Options

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### Ranking Your Options

The Master Ranking Sheet is the form you will use to rank your options.

Use the Master Ranking Sheet to list your choices in rank order (#1 = most desired, #2 = second most desired, etc.). At the time of your processing, your highest available choice will be honored, provided you meet the necessary qualifications. It is important to note that you will NOT be offered options for which you do not express a preference or for which you do not meet the threshold requirements. Check any and all boxes that express your desired treatment.

On the Master Ranking Sheet indicate ALL preferences. You may rank any job titles and exchanges from the Vacancy List, which are equal to or lower than the permanent title you currently hold. From the Bump List, you may rank any job titles and exchanges which are equal to or lower in wage scale than the permanent title you currently hold, and which are held by junior employees. **If your choice requires testing, you must schedule yourself for testing, and be tested, within 10 calendar days from your surplus coverage meeting.** FAX ONLY THE MASTER RANKING SHEET as indicated on the form.

Your ranking order may not be changed after the due date specified on your Master Ranking Sheet. Termination pay in a lump sum is the default if the form is not returned by the due date.

NOTE TO POTENTIAL BUMPEES: If you are bumped, you are eligible to bump only employees on the original surplus employee's list, provided you have ranked that position on your Master Ranking Sheet.

### **IMPORTANT FACTS TO REMEMBER**

Once an offer of your highest ranked choice is made, we will not proceed to any other ranked choice.

Please include your home telephone number and/or alternate telephone number on the Master Ranking Sheet for possible "after hours" contact.

Please correct any data on the Master Ranking Sheet that is not your current information if applicable.

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## Important Information

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### Testing

- Test scheduling through Pearson Vue at <http://www.pearsonvue.com/att>
- Testing Hot Line 1-888-850-4609
- Test Matrix, including retest intervals at [https://intra.att.com/hronestopadmin/doc/Nonmgmt\\_Test\\_Matrix\\_Southeast.pdf](https://intra.att.com/hronestopadmin/doc/Nonmgmt_Test_Matrix_Southeast.pdf).

**For more detailed information, please visit HROneStop.** From the Home Page, you may search alphabetically from the HR Quick Reference. You will find comprehensive information on a variety of HR topics including:

Career Development (for SE, also includes job descriptions and test scheduling)  
Career Resource Center (CRC)  
Leaves of Absence  
PARTNERSHIP  
Relocation  
SIPP  
Test Preparation

### To access HROneStop online:

**From work: Go to AT&T home page and click HROneStop**

**From home: [access.att.com](http://access.att.com)**

**To access HROneStop by phone:** 1-888-722-1STP (1-888-722-1787). If you experience any technical problems with the IVR, go to the following website <http://helpdesk.sbc.com/toolkit/cdt> & click on “Report a Problem”.

### Additional phone numbers that may be helpful:

**Benefits Service Center** 1-877-722-0020

**CRC Password Reset** 314-340-0111 or create web ticket at <http://helpdesk.sbc.com/toolkit/cdt>

**Altair Global Relocation** 1-877-290-8500

#### **Additional information regarding Relocation:**

- After a job offer, employees will initiate RF-338 (see Exhibit 1) and forward to supervisor.
  - The receiving department will forward RF-338 to Relocation office. Their fax number is 972-468-3001.
  - The Relocation office will send the employee an email or mail correspondence regarding relocation information.
  - **Relocation costs will be charged to the surplus department's responsibility code.**
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## Exhibits

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### Exhibit 1: Notification to Relocation Group for Nonmanagement Relocation



RF-338.pdf

### Exhibit 2: Estimation of Termination Pay Worksheet



Estimation of Term  
Pay