

Lead Clerk in TACS Role

Kentucky Postal Workers Union
2016 Spring Seminar
Pikeville Kentucky

Michael Macho – President

Michael Schmid – NBA

Randy Downard - NBA

SETTLEMENT AGREEMENT
BETWEEN THE
UNITED STATES POSTAL SERVICE
AND THE
AMERICAN POSTAL WORKERS UNION, AFL-CIO

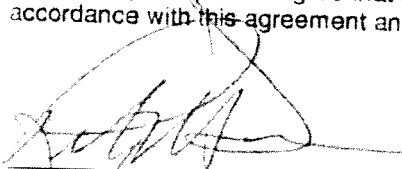
RE: Q10C-4Q-C 15194931 / HQTC20150814

Recently the parties met during pre-arbitration discussions regarding the above referenced dispute. The interpretive issue in this dispute is whether the MOU Re: *Clerk Craft Jobs*, Section 2, and the subsequent Lead Clerk Questions and Answers (Q&As) dated May 4, 2012 require that all employees occupying Lead Clerk duty assignments must be given access to the Lead Clerk Role in TACS, receive the required TACS training, and be assigned TACS duties.

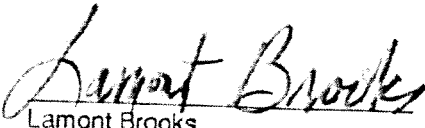
After further review and discussion, it is mutually agreed to resolve this dispute in accordance with the following understanding of the parties:

1. All Clerk Craft employees occupying Lead Clerk duty assignments will be provided the required training for the Lead Clerk Clock Office role in TACS.
2. Access to the Lead Clerk role in TACS and assignment of TACS duties is based on local operational circumstances. Example: Where there is more than 1 Lead Clerk duty assignment within the facility, not all Lead Clerks must be assigned TACS duties. However, a minimum of one will be assigned the Lead Clerk Clock Office role in TACS to perform these duties.
3. The parties agree that the provisions above are only applicable in facilities that meet the criteria for Lead Clerk duty assignments in accordance with the MOU Re: *Clerk Craft Jobs* and the MOU Re: *POSTPlan: Staffing of Offices, Filling of Assignments, PSE Usage and Conversions*.
4. In facilities that are authorized Lead Clerks and in POSTPlan offices that are authorized Lead Clerks in the APO installation, TACS duties will be assigned to the Lead Clerk in accordance with the TACS Lead Clerk Clock Office role.

Accordingly, the parties agree that any case held pending this national dispute will be resolved in accordance with this agreement and local fact circumstances.


Rickey R. Dean
Assistant Manager Contract Administration
United States Postal Service

Date: 2/4/2016


Lamont Brooks
Assistant Director Clerk Division
American Postal Workers Union
(AFL-CIO)

Date: 2/4/2016

From: Healey, Joseph M - Eagan, MN
Sent: Monday, October 15, 2012 3:02 PM
Subject: 2012-121 - New roles being created for TACS...

To TACS Coordinators...

This is an FYI...

The **FSC Role - TACS application** PowerPoint Presentation located on the **TACS Coordinator page** has been updated to reflect the changes listed below.

These changes will be implemented on **Tuesday, October 16.**

In order for **eAccess** to be updated with the new roles, the **TACS** application will be placed "**under construction**" for most of the day on **Tuesday, October 16.** During that time, no one will be able to enter a request for access to the TACS application in eAccess. When the user attempts to request access to TACS, a message will be displayed telling them to try later... and to contact their local TACS Coordinator if needed.

CHANGES:

Due to the creation of the new LEAD CLERK position, we are implementing a new **LEAD CLERK CLOCK OFFICE** role in TACS that may be granted to these employees via the eAccess application. After much discussion, this new role will include limited reporting capabilities for open weeks and the ability to place an employee on hold.

The LEAD CLERK CLOCK OFFICE role will have the following capabilities:

- Allow optional write access to the PPWkHold Module
- Allow optional write access to the Clock Ring Editor Module in the same manner as the E_TACS_CLERK role.
- Allow ability to run and view the following reports for open week(s):
 - Employee Moves
 - Clock Ring Error

- Missing Time
- Unauthorized Overtime
- LDC/Operation Summary
- Station Summary
- Non-Crossfoot Errors
- Daily Hours
- Miss Cert
- Certificates Sign Off

The TIMECARD and SUPERVISOR roles are being eliminated:

These two roles will be removed from use within the next 6 months. Effective immediately, any user requesting one of these roles should be DENIED and the user should be instructed to request one of the appropriate new roles from below.

All users who **currently** have the **TIMECARD** or **SUPERVISOR** role should **request** the **new appropriate role** via **eAccess** as soon as possible. Any user with one of **these roles** will be **revoked** during the next **Periodic Review**.

We have created five new roles to replace the TIMECARD and SUPERVISOR roles. They are:

TIMECARD SUPV

This role is a replacement to the current TIMECARD role.

This role is restricted to:

- managers/supervisor in **field** timeCARD offices
- those detailed as managers/supervisors in **field** timeCARD

offices

TIMECARD NON-SUPV

This role is a reduced version of the current TIMECARD role.

This role is designed to be the timeCARD version of the LEAD CLERK CLOCK OFFICE role.

This role is designed for:

- non-supervisory** employees assigned to **field** timeCARD offices
- those **detailed** to **non-supervisory** positions in **field** timeCARD

offices

At local discretion this role may be granted to all employees in a timeCARD office.

This role allows for:

- Timecard Entry
- 1314 Entry
- 1314A Entry
- Limited reporting capabilities

TIMECARD HQ/HQ RELATED

This role is the HQ/HQ-Related replacement to the current TIMECARD role.

This role is restricted to HQ and HQ Related field units and requires national level FSC approval.

This role provides all capabilities of the current TIMECARD role with the exception of:

- 1314 Entry
- 1314A Entry
- RTACS Reporting
- REBR Reporting

SUPERVISOR FIELD:

This role is a replacement to the current SUPERVISOR role.

This role is restricted to:

- managers/supervisor in field timeCLOCK offices
- those detailed as managers/supervisor in field timeCLOCK offices

SUPERVISOR HQ/HQ RELATED

This role is the HQ/HQ-Related replacement to the current SUPERVISOR role.

This role is restricted to HQ and HQ Related field units and requires national level FSC approval.

This role provides all capabilities of the current SUPERVISOR role with the exception of:

- 1314 Entry
- 1314A Entry
- Rural Clock Ring Editor
- RTACS Reporting
- REBR Reporting

Thanks
Joe Healey
HQ Payroll

To TACS Coordinators...

This is an FYI...

Please share this information with your Area and/or District HR Managers...

Effective PP 2013-12 (Wednesday, May 22)

-The LEAD CLERK CLOCK OFFICE role will be modified as follows:

1. 1314 Entry Module will be added. Default will be set to Qry.
2. 1314A Entry Module will be added. Default will be set to Qry.
3. Access to the Clock Ring Editor will be modified as follows:
 - o Allow the ability to **save** an entry if **Upd** is checked
 - o Access to the **Future** tab will be added
 - o Access to the **Job Asgn** tab will be removed
4. All existing users provisioned with the LEAD CLERK CLOCK OFFICE role will be updated per 1, 2 and 3.

NOTE:

The FSC Role - TACS application PowerPoint Presentation located on the TACS Coordinator page has been updated.

These changes are required due to the change in the HR STD POSITION DESCRIPTION (Job Descriptions) of the three LEAD CLERK positions referenced below (see attached). This change is scheduled for release in mid May and entails adding the following language:

"Makes Supervisor approved entries to correct time and attendance records and retains required supporting documents."

Please note that all users currently provisioned with the LEAD CLERK CLOCK OFFICE role who have the Upd column checked for the Clock Ring Editor will then have the capability to SAVE entries in the Clock Ring Editor. If you do not want a current TACS user provisioned with the LEAD CLERK CLOCK OFFICE role to have the ability to SAVE entries in the Clock Ring Editor, then you will be required to uncheck the Upd column on a case by case basis.

TRAINING:

Prior to being granted the LEAD CLERK CLOCK OFFICE role, it is recommended the user receive the same training that is required prior to someone being granted the SUPERVISOR FIELD role.

It is important to remember that employees provisioned with the LEAD CLERK CLOCK OFFICE role must only make entries in the TACS application if they have the properly completed corresponding/required documentation. Examples of this required documentation includes, but is not limited to, the following:

5/14/2013

<u>Type of Entry</u>	<u>Document Required</u>
• Leave (any type)	PS Form 3971
• Guaranteed Time	PS Form 3971
• Clock Ring (any)	PS Form 1260 or PS Form 1261
• Disallow time	PS Form 1017-A <u>and</u> PS Form 1260 or PS Form 1261
• OT Transaction (Unscheduled)	PS Form 1017-B <u>and</u> PS Form 1261
• OT Transaction (Scheduled)	PS Form 1261
• Higher Level	PS Form 1723
• Rural timecard	PS Form 1314 or PS Form 1314A

NOTE:

The PS Form 1261 is in the process of being modified to replace the SSN with the EIN. Until this form is modified, the current PS Form 1261 can still be used for this purpose by simply entering the EIN in the SSN blocks. In addition, the PS Form 1261 is being modified to more accurately reflect the manner in which an OT Transaction is entered in the TACS application.

It is also important to remember that only those employees assigned to a timeCLOCK office whose position of record is one of the LEAD CLERK positions listed below may be granted the LEAD CLERK CLOCK OFFICE role. This role may also be granted on a temporary basis via the Detailed Assignments - Temporary Access submission requirements (listed below) to employees detailed to one of these three positions.

Thanks
 Joe Healey
 HQ Payroll

<u>The following employees assigned to timeCLOCK office may be granted the LEAD CLERK CLOCK OFFICE role:</u>	
LEAD CUSTOMER SERVICE CLERK PS-07	Occupation Code: 2320-0008
LEAD MAIL PROCESSING CLERK PS-07	Occupation Code: 2315-7153
LEAD SALES & SERVICES ASSOCIATE PS-07	Occupation Code: 2320-0009

<p><u>Detailed Assignments - Temporary Access</u> Submission Requirements Example</p> <ol style="list-style-type: none"> 1- Select the Yes answer to "Is this request associated with a detail assignment?" 2- Enter the Detail End Date (cannot exceed 180 days and must match 1723 End Date) 3- Enter the FULL detailed position Occupation Title in the Special Instructions block 4- Enter a reference that a 1723 is on file in the Special Instructions block. 5- Enter the detailed Finance Number <p><i>Note - all 5 items are required to qualify for FSC approval</i></p>
--

Michael Schmid

From: Barber, Karen - Cleveland, OH <Karen.Barber@usps.gov>
Sent: Monday, March 14, 2016 5:41 PM
To: Michael Schmid; Sharyn Stone; Mike Gallagher; Nancy Olumekor; Kenneth L. Beasley; Michael Schmid; Randall "Randy" Downard; Jeff Kehlert; Robert Romanowski; John Jackson
Subject: FW: TACS Training for Lead Clerks
Attachments: National Dispute Settlement - Lead Clerk TACS.pdf; FW: Labor Relations HR Meeting 02242016 LEAD CLERK TACS ROLE.ppt
Importance: High

FYI

The Eastern Area has set up a vigorous schedule to ensure all Lead Clerks are trained in the TACS role in compliance with the National Dispute Settlement signed on February 4, 2016. The attached email outlines the issue and the directions for completion.

We anticipate that 1265 Lead Clerks will be trained in the TACS role by August 1, 2016. The attached email contains and excel workbook which lists the actual clerks who must be trained. It also lists the Lead clerks who have already been given the TACS training.

Lead Clerks - Training Required

CLUSTER NAME	LEAD CUST SERVICE CLERK	LEAD MAIL PROCESSING CLERK	LEAD SALES & SERVICES ASSOCIATE	<i>Grand Total</i>
APPALACHIAN PFC	1	9	86	96
CENTRAL PENNSYLVANIA	2	17	81	100
KENTUCKIANA PFC		18	100	118
NORTHERN OHIO PFC	1	18	143	162
OHIO VALLEY PFC		20	127	147
PHILADELPHIA METROPO	6	14	123	143
SOUTH JERSEY PFC	2	16	130	148
TENNESSEE PFC	6	27	117	150
WESTERN NEW YORK PFC	1	7	67	75
WESTERN PENNSYLVANIA		15	111	126
Grand Total	19	161	1085	1265



UNITED STATES
POSTAL SERVICE®

Step 4 Interpretive Dispute Settlement Lead Clerks and TACS Training

ALL LEAD Clerks will be provided the required training for the Lead Clerk Clock Office role in TACS

CS Role

SETTLEMENT AGREEMENT

BETWEEN THE

UNITED STATES POSTAL SERVICE

AND THE

AMERICAN POSTAL WORKERS UNION, AFL-CIO

RE: Q10C-4Q-C 15194931 / HQTC20150814

Recently the parties met during pre-arbitration discussions regarding the above referenced dispute. The interpretive issue in this dispute is whether the MOU Re: *Clerk Craft Jobs*, Section 2, and the subsequent Lead Clerk Questions and Answers (Q&As) dated May 4, 2012 require that all employees occupying Lead Clerk duty assignments must be given access to the Lead Clerk Role in TACS, receive the required TACS training, and be assigned TACS duties.

After further review and discussion, it is mutually agreed to resolve this dispute in accordance with the following understanding of the parties:

1. All Clerk Craft employees occupying Lead Clerk duty assignments will be provided the required training for the Lead Clerk Clock Office role in TACS.
2. Access to the Lead Clerk role in TACS and assignment of TACS duties is based on local operational circumstances. Example: Where there is more than 1 Lead Clerk duty assignment within the facility, not all Lead Clerks must be assigned TACS duties. However, a minimum of one will be assigned the Lead Clerk Clock Office role in TACS to perform these duties.
3. The parties agree that the provisions above are only applicable in facilities that meet the criteria for Lead Clerk duty assignments in accordance with the MOU Re: *Clerk Craft Jobs* and the MOU Re: *POSIPlan: Staffing of Offices, Filling of Assignments, PSE Usage and Conversions*.
4. In facilities that are authorized Lead Clerks and in POSiPlan offices that are authorized Lead Clerks in the APO installation, TACS duties will be assigned to the Lead Clerk in accordance with the TACS Lead Clerk Clock Office role.

Accordingly, the parties agree that any case held pending this national dispute will be resolved in accordance with this agreement and local fact circumstances.

Rickey R. Dean
Area Manager Contract Administration
United States Postal Service

Date: 2/4/2016

Lamont Brooks
Assistant Director Clerk Division
American Postal Workers Union
(AFL-CIO)

Date: 2/4/2016



UNITED STATES
POSTAL SERVICE®

LR Step 4 Lead Clerks /TACS Role

LR Step 4 Lead Clerks /TACS Role Step 4 Interpretive Dispute Settlement Lead Clerks and TACS Training

RE: Q10C-4Q-C 15194931 / HQTC20150814

Recently the parties met during pre-arbitration discussions regarding the above referenced dispute. The interpretive issue in this dispute is whether the MOU Re: Clerk Craft Jobs, Section 2, and the subsequent Lead Clerk Questions and Answers (Q&As) dated May 4, 2012 require that all employees occupying Lead Clerk duty assignments must be given access to the Lead Clerk Role in TACS, receive the required TACS training, and be assigned TACS duties.



UNITED STATES
POSTAL SERVICE®

LR Step 4 Lead Clerks /TACS Role

After further review and discussion, it is mutually agreed to resolve this dispute in accordance with the following understanding of the parties:

1. All Clerk Craft employees occupying Lead Clerk duty assignments will be provided the required training for the Lead Clerk Clock Office role in TACS.
2. Access to the Lead Clerk role in TACS and assignment of TACS duties is based on local operational circumstances. Example: Where there is more than 1 Lead Clerk duty assignment within the facility, not all Lead Clerks must be assigned TACS duties. However, a minimum of one will be assigned the Lead Clerk Clock Office role in TACS to perform these duties.
3. The parties agree that the provisions above are only applicable in facilities that meet the criteria for Lead Clerk duty assignments in accordance with the MOU Re: *Clerk Craft Jobs* and the MOU Re: *POSTPlan: Staffing of Offices, Filling of Assignments, PSE Usage and Conversions*.
4. In facilities that are authorized Lead Clerks and in POSTPlan offices that are authorized Lead Clerks in the APO installation, TACS duties will be assigned to the Lead Clerk in accordance with the TACS Lead Clerk Clock Office role.

Lead Clerk Clock Office



Updated 08/20/2015

LEAD CLERK CLOCK OFFICE role

This role was designed for the LEAD CLERK position in field timeCLOCK offices. This role is designed to allow the LEAD CLERK the ability to support the supervisor by being able to run various reports and to make supervisor approved entries to correct time and attendance records based on properly completed supporting documents. This role may also be granted to the Group Leaders at the REC site whose duties include "enters time and attendance data; and verifies and corrects time records". This is a Read / Write role.

- **Who may be granted the LEAD CLERK CLOCK OFFICE role:**

Employees in the following positions and those detailed to these positions:

- Occupation Code: 2320-0008, LEAD CUSTOMER SERVICE CLERK PS-07
- Occupation Code: 2315-7153, LEAD MAIL PROCESSING CLERK PS-07
- Occupation Code: 2320-0009, LEAD SALES & SERVICES ASSOCIATE PS-07
- Occupation Code: 0356-10XX, GRP LDR DATA CONVERSION OPERATOR (P7-06)

- **Who may NOT be granted the LEAD CLERK CLOCK OFFICE role:**
Everybody else.

NOTE 1:

It is required that the user attends the 8 hour TACS Supervisor Training (course # 31267-01). It is also highly recommended that user first complete LMS TACS System Training (course # 10022826) and the 4 ½ hour Time Is Money class (course # 21564-01).

NOTE 2:

This role requires Area level approval.

This role requires National level approval if the Area does not utilize the FSC role.

Training Must be Completed by August 1, 2016

LSSA Training Requirements

#1. TACS System Training #10022826

Covers navigation within the TACS application. It includes running required reports, using reports to monitor employee clock rings, maintaining employee job assignment information, placing employee data on hold, identifying and correcting errors and missing time and entering proper authorizations.

*Course Length: 4.5 Hours
Web-based*

#2. TACS Supervisor Training #3126701

Provides TACS application training, including how to access the system, log on and off, navigate, make corrections in the Clock Ring Editor, generate and interpret reports. Includes using Electronic Badge Reader (EBR) to make entries in the Clock Ring Editor.

*Course length: 8 Hours
Classroom Instructor-Led*

Training Must be Completed by August 1, 2016