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# **TACS: Time and Attendance Collection System Supervisor Training**

## **Participant's Workbook**

**Course 31267-01  
April 2012**

Finance  
**Payroll**

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## **MODULE ONE**

# **INTRODUCTION**

## **PARTICIPANT INTRODUCTIONS**

Name

Position (title and location)

Years in position

Years of service

Prior TACS experience?

What are you hoping to get from this class? Any major questions you hope to be addressed?

## **ABOUT TACS**

The Time & Attendance Collection System (TACS) is an Oracle Data Base system designed to combine all of the time keeping systems used by the U.S. Postal Service. TACS combines the functionality of the following five previously used systems into one standard and automated time and attendance system for all Postal Service Offices.

- City T&A Processing System (CTAPS)
- PC-City T&A Processing System (PC-CTAPS)
- Rural T&A Processing System (RTAPS)
- Electronic Time Clock System (ETC)
- Postal Source Data System (PSDS)

TACS is a web-based system residing in a central location (Eagan MN) with highly reliable hardware and software that maintains all program and data files. Access is restricted to only those Users whose position (whether permanent or temporary) authorizes them use of the application. Payroll data is considered sensitive and must be secured from unauthorized access. Other “External” systems may read the information but are not authorized to modify it. The following “External” systems are sent raw data intermittently from TACS.

- Web-MODS (Management Operating Data System)
- FLASH
- DOIS (Delivery Operations Information System)
- ABC (Activity Based Costing)
- eRMS (Enterprise Resource Management System)
- LTATS (Loan, Training and Transfer System)
- EDW (Enterprise Data Warehouse)

**TACS did not change timekeeping policies and procedures**, but provides a more efficient, less expensive vehicle for the execution of those policies and procedures.

## **FUNCTIONALITY & BENEFITS OF TACS:**

### **1. System of National Scope**

- Improved functionality over previous systems.
- Capable of standardizing data collection and Time & Attendance across the country. TACS supports every office in the Postal Service replacing all previous timekeeping systems.

### **2. Improved Security**

- There are eleven (11) Application Templates (Roles):
  - Coordinator
  - TACS Clerk
  - Finance
  - Supervisor
  - HR
  - OIG/CSS
  - Reports
  - Timecard
  - HQ Payroll
  - Stat Programs
  - Budget Analyst
- Requests for access to TACS are made through the eAccess application and authorization level must coincide with the Users' position (permanent or temporary). Each local TACS Functional Systems Coordinator (FSC) is required to conduct bi-annual reviews of current access and revoke unauthorized users.

### **3. Access to information.**

- Data can be input and retrieved from any Postal computer workstation, anywhere, that has access to the postal intra-net.
- Two open weeks on-line in the Clock Ring Editor from Thursday through Monday each week.

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- When transferring hours to different Finance Numbers, all Finance Numbers (nationwide) are available in the LTATS Entry Module.

### **4. Automated**

- TACS automatically opens and closes out payroll weeks.
- TACS automatically sends external systems data intermittently, as needed.

### **5. Reporting**

- 85 On-Demand Reports
- Near real time reporting - Improved polling applications/processes allows actual real time reporting.
- Employee leave balances are updated on the Thursday following the close of each pay period.
- Salaries and benefits by Pay Location and Employee Type.
- Improved processes allowed for increased polling to our EBRs (Electronic Badge Readers/Time Clocks) allows external programs to be sent data based on need.
- Activity-Based Costing requires information at the two-digit local unit code level. No other system can provide this information.

### **6. Minimize Paperwork**

- Unless specifically directed by local management or policy, there are no reports in TACS that you are mandated to print and retain. Most reports have an archived data feature that allows you to view data from prior years, pay periods and weeks.
- With the creation of TACS and the responsibility of timekeeping assigned to immediate supervisors/managers, the use of PS Form 1260 has changed. It is now used by management (TACS Users) to document missed basic clock rings (BT, OL, IL, ET) by their employees. Employees are required to complete, sign & submit to their immediate manager/supervisor for approval when one or more of the basic rings is missed altogether. PS Forms 1260 are not required when changing an existing ring or when adding a move.
- Ability to place employees' time on hold thru Monday, if necessary can reduce payroll adjustments.

## **7. Reduction of Costs Associated with Payroll Processing**

- TACS provides management direct access to their employees' timekeeping records, thus eliminating support staff for previously used timekeeping systems.
- Ability to place employees' time on hold through Monday, if necessary, assists in reducing payroll adjustments processed.
- There was a significant savings from the salaries and benefits associated with the abolishment of previously authorized PSDS & ETC positions; however, costs due to the high number of adjustments that continue to be processed each year (two million adjustments per year on average) eat away at these savings. Additional negative impacts caused by payroll adjustments, include, but are not limited to:
  - Employee Morale (employees expect to be paid for all work hours and premiums due)
  - Costly Salary Advance and Collection Procedures

## **BUSINESS FUNCTION**

The TACS system provides supervisors and managers with actual work hour data used in monitoring their labor hours and dollars at the local level. The system transmits summarized data of the actual payroll hours to the Payroll System in Eagan. The primary business function of this system is to collect and calculate time and attendance information needed by the Payroll System so that all employees are paid accurately and timely.

## **SYSTEM USE**

The TACS system is used by Postal installations to collect employee time and attendance information. There are many users of the Time & Attendance Collection System because of the corporate value of its data. The information collected and processed is beneficial to all levels of management, from the postmasters of the smallest offices to the national reports reviewed by the Postmaster General.

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Many information systems are fed data on a regular basis by TACS, allowing 'read only' access to its employee work hour information.

The most common users at the local level can be postmasters, managers, supervisors, timekeepers and support personnel. Postmasters, Managers and support personnel will use the system to monitor all aspects of operational performance (i.e., review facility, finance number or pay location by LDC work hour, leave and overtime usage). Supervisors will use TACS to monitor and correct employees' clock rings and to enter and monitor employee overtime, leave, and higher level authorizations. The timekeepers can use the system to help maintain employee data, and provide assistance to all authorized users in an effort to ensure that all performance cluster employees are paid correctly.

## **SAMPLE REPORTS**

Modules 5 and 6 of this Training Guide contain samples of the 85 reports currently available in TACS. The TACS Reports provide you with useful, near real-time information relative to your operation(s), and are presented in a variety of pre-set formats that you will be able to generate for yourself at any Postal computer. By the conclusion of today's training, you will learn how to generate some of these reports.

## **TACS ASSISTANCE**

You may run into occasional difficulty when using TACS, as you would with any new piece of computer hardware or new application. Your first recourse, if you are unable to resolve a problem on your own, is to use the Participant's Workbook, the TACS User's Guide, On-Screen Help or contact **your local TACS Office**.

There are standard maintenance windows for TACS during which the application may be unavailable.

- ✓ Every Wednesday, 0100-0500 CST (database backup)
- ✓ Every 2<sup>nd</sup> and 4th Sunday of each AP, 0400-1100 CST (Unix Maintenance)

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## TACS TRAINING

If additional or optional maintenance is scheduled, users will be notified in advance, whenever possible, on the TACS home page under the title "Time and Attendance Collection System".

## COURSE OBJECTIVES

Upon completion of this training, you should be able to:

- ✓ Log in and out of the TACS application.
- ✓ Navigate within the application.
- ✓ Use the Clock Ring Editor to authorize/certify subordinate employees' time by adding, changing, deleting and/or duplicating clock rings to ensure your employees' work hours are accurate.
- ✓ Use the Clock Ring Error Report and the Pay Location Error feature located in the Clock Ring Editor to identify fatal and warning messages and then correct them in the Clock Ring Editor.
- ✓ Use the PP/Wk Holds Module to initiate a hold(s) to employees' data to prevent early processing either individually (where holds remain until Monday close) or by Pay Location (where holds remain until Saturday).
- ✓ Use the Missing Time Report to identify employees that are missing part or all of a scheduled work day.
- ✓ Use the Unauthorized Overtime Report to ensure all instances of overtime are addressed.
- ✓ Use the Hours Type Inquiry Report to identify specific pay and reason codes (For example: Out of Schedule (OOS) – Code 073; Overtime (OT) – Code 053; Guarantee Time (GT) – Code 062; Guarantee Overtime (GOT) – Code 068; and, Penalty Overtime (POT) – Code 043).
- ✓ Use reports to monitor employee clock rings to ensure employee adherence to postal rules and regulations, as well as to monitor unit productivity to ensure achievement of postal service targets and goals.
- ✓ Use the Electronic Badge Reader (EBR) to input leave, address instances of unauthorized overtime, authorize higher level, and add or delete clock rings.
- ✓ Explain to time clock employees (those who use time badges) how to properly use an EBR and educate them on the use/function of all EBR buttons..

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## **MODULE TWO**

# **LOGGING IN AND NAVIGATING IN TACS**

## **SECURITY**

Because TACS data is considered sensitive, every effort must be made to safeguard TACS access and information. Time & Attendance records contain information about individuals. All employees have a right to privacy. As such, all TACS records should be handled and disclosed only in accordance with the Privacy Act and implementing instructions. You can be personally sued if you do not adhere to the Privacy Act.

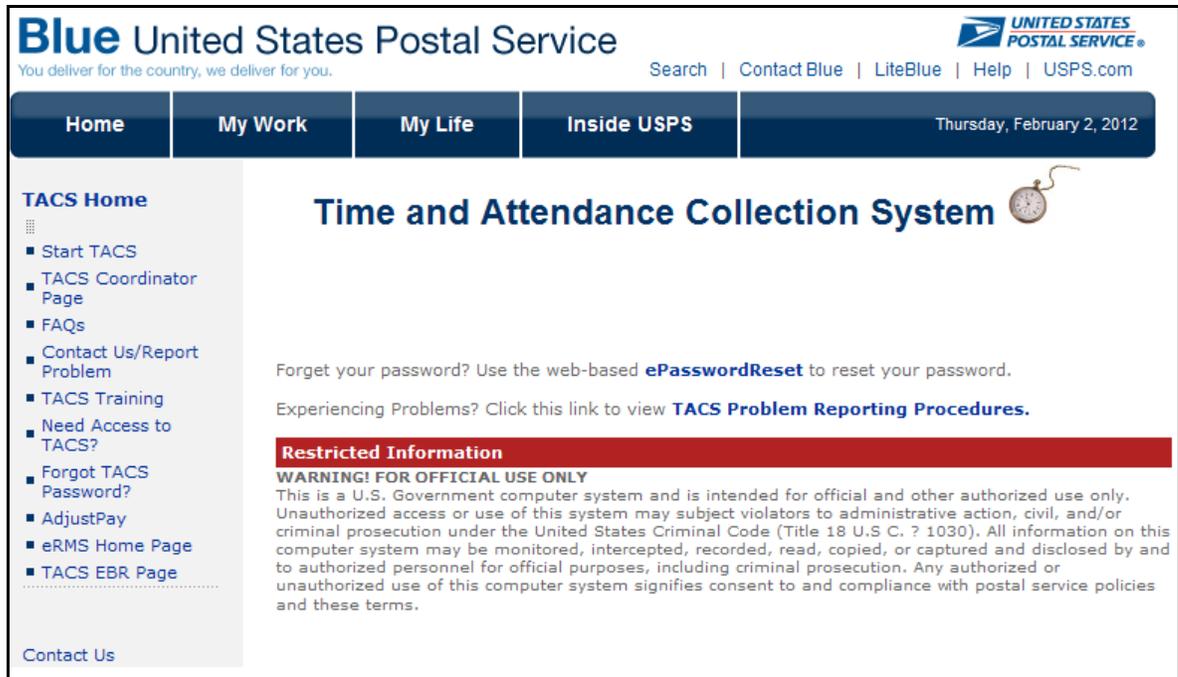
Avoid printing and/or retaining hard copy reports, as much as feasibly possible. If deemed necessary, however, you must make certain they are kept secure. Do not leave them at the printer for any length of time. When discarded, if at all possible, we recommend that you shred them. It is mandatory that all users lock their computer screen or log out of the TACS application if not using or if called away from your desk.

**Additionally, DO NOT share your TACS User ID and password with anyone.** If you feel your password has been compromised, change as soon as possible.

## **FINDING TACS FROM THE BLUE PAGE**

From the postal intra-net blue page, you can either type the word “TACS” into the Uniform Resource Locator (URL) address or you can find TACS listed under “Essential Links” on the upper left side of the Blue home page. Many District Home Pages also have created a link to TACS. Do not create or use shortcuts or favorites to access TACS.

Let’s take a few minutes to look at the TACS web page.



“TACS Home” is the TACS home page, pictured above.

“Start TACS” takes you to the log on screen for TACS.

“TACS Coordinator Page” provides useful documents for download, including training manuals and update memos.

“Contact Us” brings you to a page that contains some useful links.

“TACS Training” takes you to a training version of the TACS application. It contains information that is not live and can be used during a TACS training class.

“Need Access to TACS?” is a link to eAccess so you can request TACS Access.

“Forgot TACS Password?” takes you to the ePassword Reset site so you can reset your password and/or unlock your User ID if locked due to 6 unsuccessful login attempts.

“AdjustPay” takes you to the AdjustPay home page.

“eRMS Home Page” takes you to the eRMS home page.

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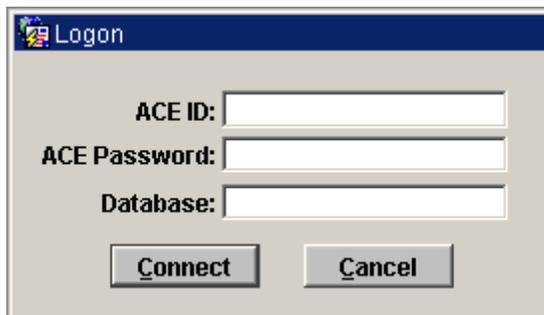
### TACS TRAINING

“TACS EBR Page” links you to information on the EBR’s and Hyper EBR’s.

For training, we will log into the TACS training database. In the training database, we can experiment and practice without affecting the pay of any employees. The current version of the program is frozen with *PP 05-2000 data*. In contrast, when you access TACS using “Start TACS,” and your specific ID, Password and TACS Instance, your keystrokes, when they are saved, will have consequences to employees’ pay.

## LOGGING INTO THE TACS APPLICATION

1. Since the TACS application is accessed through the local network, all users need an ACE account, obtained through an eAccess request for “ACE (Active Directory)”. Prior to logging on, all users must request and be approved TACS access via an eAccess request.
2. From the TACS Home page, click on the link “Start TACS” and the Logon screen will be displayed.



The screenshot shows a Windows-style dialog box titled "Logon". It contains three text input fields stacked vertically. The first field is labeled "ACE ID:", the second "ACE Password:", and the third "Database:". Below these fields are two buttons: "Connect" and "Cancel".

The ACE ID assigned to you will have to be entered into the first field on the screen.

3. Enter the required ACE Login Password.
4. Enter the database name and then select Connect. When the entries have been verified the WARNING screen will be displayed. You must select “I agree with these conditions” to proceed to the TACS Home Module. If you do not agree, you will be routed back to the blue page.

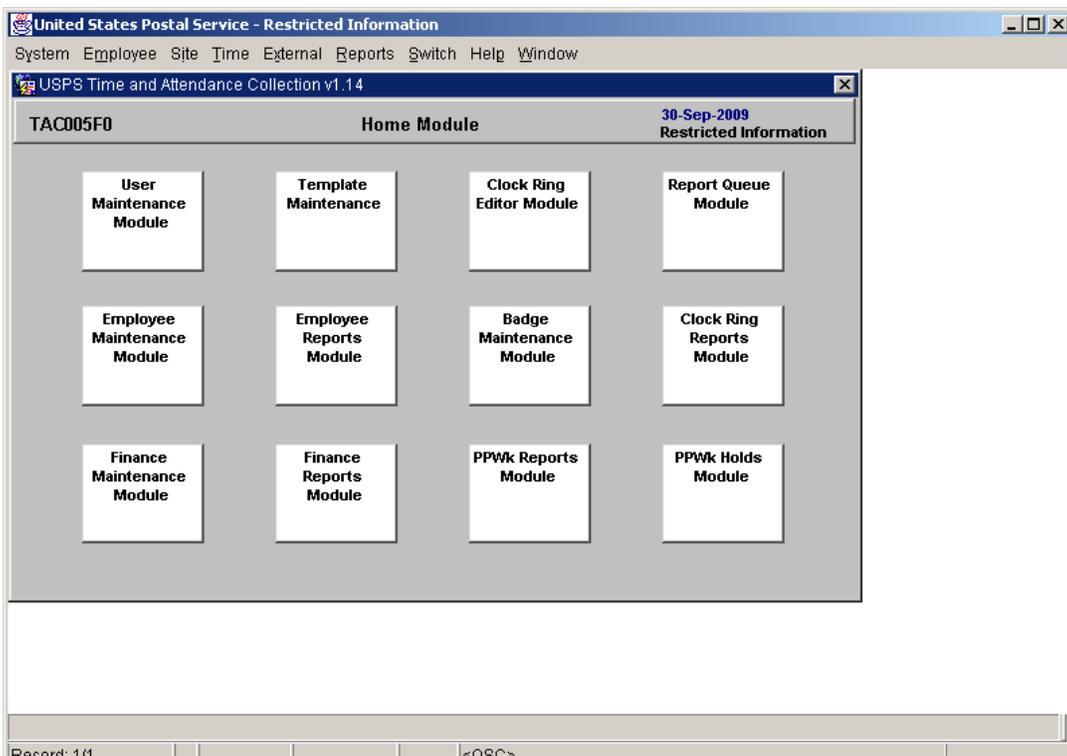
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5. To change your password or to “unlock” your ID due to 6 sequential unsuccessful attempts at logging in, you will need to use the ePassword Reset application.

## NAVIGATING IN TACS

The screen below is a sample of how your TACS home module may look. The District TACS Coordinator is able to customize up to twelve of the most frequently used modules within TACS as short-cut buttons on this screen. This is accomplished in the User Maintenance Module in the Icon Sequence Tab.

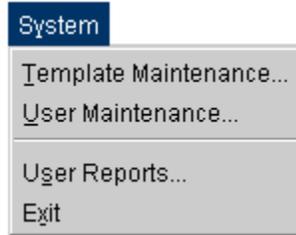


Your local FSC (normally the Manager, Financial Programs Compliance) will approve an appropriate level of access based on your position. If you do not have access to a module, the module will be “grayed out” when you access using the Drop Down menus.

There are 9 drop-down menus; however, you will spend the majority of your time in columns 2 (Employee), 4 (Time) & 6 (Reports).

## SYSTEM MENU

Most of the functions here are limited to the TACS Staff employees.



Template Maintenance – allows the TACS Coordinator to create finance number templates for user access.

User Maintenance – is used to assign various functions of the Time and Attendance Collection System (TACS) to users. This module is used by the TACS Coordinator to modify a TACS Users' access to various modules or finance numbers in the TACS application. You will only be approved for a role that allows you to perform the functions necessary of your permanent or temporary position. Functions you do not have access to will appear “grayed” out.

User Reports – is restricted to the TACS Staff.

Exit - The proper way of exiting TACS is by selecting **System** from drop-down menus and left clicking on “Exit.” You will then receive a pop-up window asking “Are you sure you want to exit the application?” – Select “Yes” to continue to exit.

## SITE MENU



**Finance Maintenance** – is restricted to the TACS staff and provides information on Finance Numbers residing in Time and Attendance Collection System (TACS). Some of this information can be changed but most is based on information from the mainframe in Eagan. Only the TACS staff has access to add and/or delete finance units and pay locations using this module.

**Misc Site Information** – provides local and remote contacts for supporting the TACS Data Base.

**Master Schedule Maintenance** – is restricted to the TACS Staff and provides information on the 22 predefined schedules used within TACS. The Site Defined Tab allows the HQ Payroll group to create schedules that are not covered by the predefined schedules. Schedule 700 – 714 were developed specifically for rural carriers. The HR Defined tab displays schedules that have been created for use by HRSSC.

**Active Operations Maintenance** – shows the operation numbers that are currently active in TACS for a given finance number. This module allows an authorized user (primarily the TACS Staff) to activate or de-activate operation numbers used within TACS. Active operation numbers can only be de-activated if there are no employees assigned to them. This module is also used to assign Local Units (LUs) to operation numbers in order to further isolate and report on operations.

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### TACS TRAINING

**Finance Reports** – There are 7 reports in this module that allow you access to information concerning the finances of your unit.

**Misc Site Reports** – The Miscellaneous Site Reports Module contains the Miscellaneous Site Information Report.

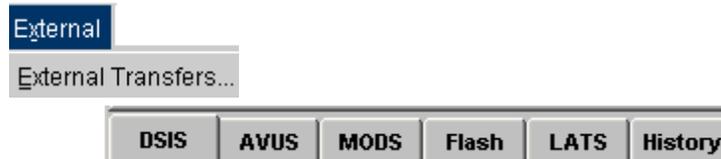
**Schedule Reports** – There are 7 reports in this module that allow you access to information concerning employees' schedules and hours utilization.

**Active Operation Reports** – There are 3 reports in this module that allow you access to information concerning active operation numbers and LU's by finance number(s). Modifications have been made to the National Authorized Operation Reports to allow Users to view by specific office type (CAG, Function).

**Clock Ring Reports** – There are 10 reports in this module that allow you access to information concerning employee clock rings.

**Timecard Entry Reports** – There are 3 reports in this module that allow you access to information concerning weekly payroll information of manual timecard offices.

## EXTERNAL (EXTERNAL TRANSFERS ) MENU



DSIS (renamed DOIS) – DOIS is a web-enabled application used by delivery unit supervisors to support the management of delivery unit office activities, planning of street activities from the office, and the management of route inspection and adjustment activities. TACS automatically feeds data to DOIS every 15 minutes.

AVUS – This option has become obsolete.

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MODS (Web-MODS) - The Management Operating Data System (MODS) is a web-enabled application that provides a systematic approach to gathering, storing and reporting data pertaining to workload, workhours, and mail processing machine utilization. The MODS application is sent TACS data (Adds, Changes, and Deletes) every hour on the half hour – 7 days a week.

FLASH (eFlash)- The Flash Reporting System (FLASH) is a weekly operating reporting management system that receives information from TACS. FLASH gathers input from various sources from a pay location level. Data is accumulated for post offices and summarized at various organizational levels including a National level report. Reports contain payroll and non payroll data combined into a single page financial status overview of the organization and used as a management tool for the various functional areas.

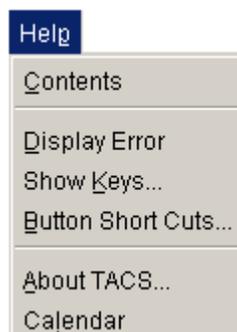
LATS – This option has become obsolete.

HISTORY - This option has become obsolete.

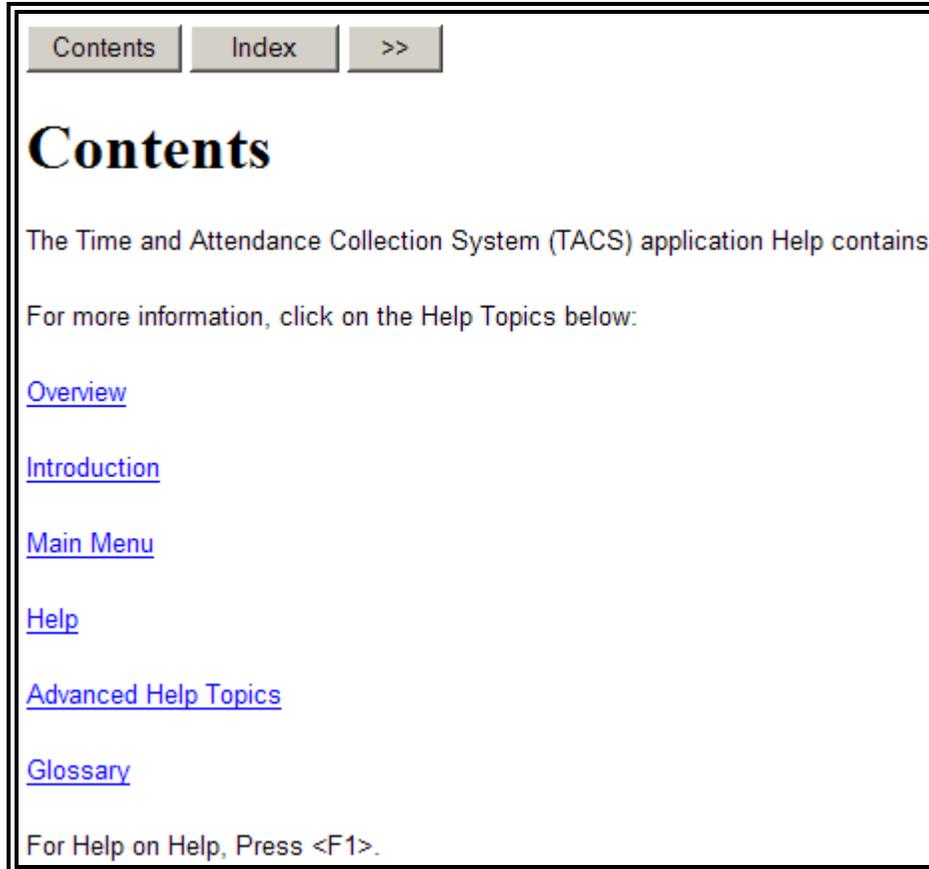
## HELP MENU

We encourage you to use TACS Help as your first recourse when you run into any problems.

When you click on **Help**, a drop down will appear with the following:



When you double-click on the first item in **Help**, “Contents”, the following menu appears in a separate window. The Help “Contents” feature is also accessible in the bottom right hand corner of each module you open, under the “Close” button.



Contents Help is defined as the overall package. When the user looks at “Contents” Help, they find all topics available. The user will have lookup or search capability throughout this help file. The user can either search by keyword or lookup information by topic.

In the remainder of the TACS application, the user has the option to access help from a “Help” button on the screen. This will display the “Contents” Help, arranged in order by topic name.

We cannot stress enough the importance of utilizing **Help** when questions arise when you are doing your job. Think of it as a performance support system: it exists solely to ensure that you are able to do your job and you have immediate access to it.

## DISPLAY ERROR

Is obsolete and will be removed in a future TACS upgrade.

## SHOW KEYS AND BUTTON SHORT CUTS

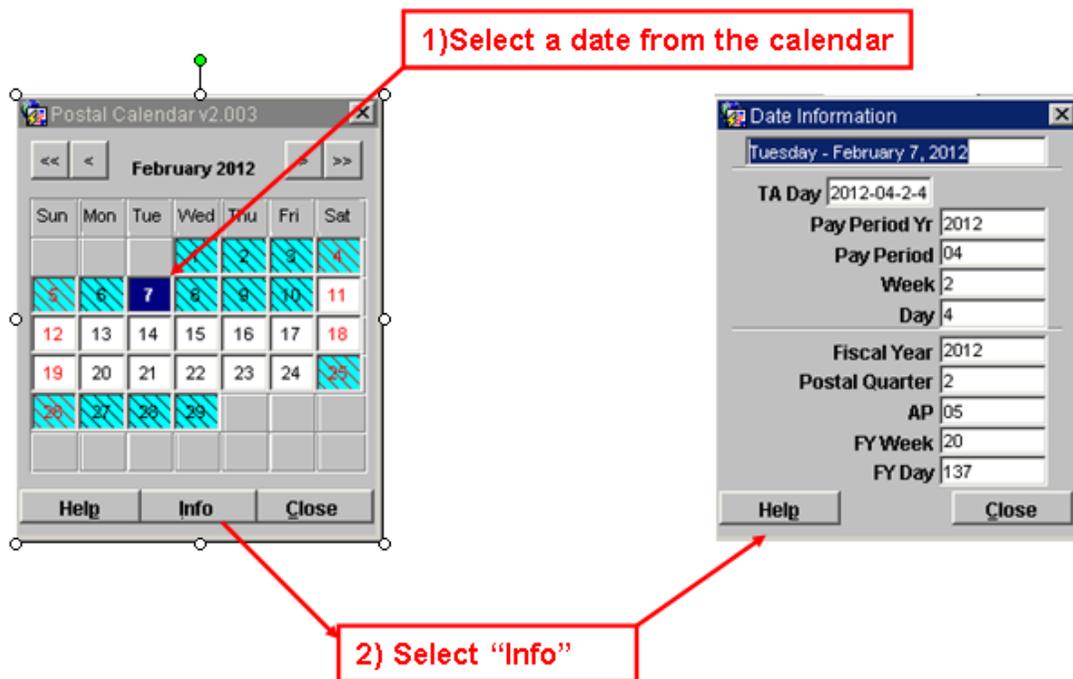
Two lists of keyboard shortcuts are contained within TACS Help, and are called “Show Keys,” and “Button Short Cuts.” These provide a list of keystrokes for those who find using the mouse slow or cumbersome. Appendix 1 has a list of keyboard shortcuts.

## ABOUT TACS

This will display the current user and version of TACS.

## CALENDAR

When selected, a calendar will appear in a new window that displays past, current and future months/years. The different colors reflect the breaks between pay periods. If you click on a specific date and then select the “Info” button, a new window will provide you with additional information relative only to that specific date.



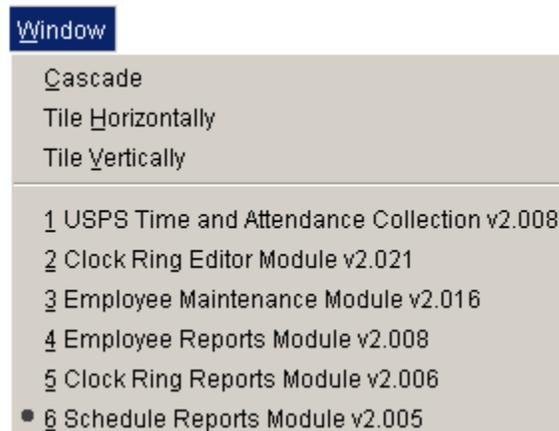
## Additional HELP Tools (not included in the HELP Module)

**Hint Text** – provides you with messages to assist you in completing your work. They are displayed automatically on your bottom bar (left side) when the application detects a User has removed a required field or is attempting to update a locked field that cannot be modified. It sometimes prevents the User from continuing forward until corrected. Examples of these messages include, but are not limited to, the following.

- “You are not authorized to update here”
- “Invalid Punch Date/Time”
- “Enter a valid Local Unit”

**Pop-Up Error Windows:** These small windows appear with error messages as users attempt to save add or modify existing rings that contain invalid data entries.

## WINDOW MENU



You may keep as many as 6 TACS modules open at the same time and toggle back and forth between the open screens. You do this by using the **Window** menu.

In the example above, you can see that there are currently six different windows open in this user's application. The module you are currently on has a black circle to the left of it. This user is currently in the Schedule Reports Module.

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If you needed to move to the Clock Ring Reports Module while leaving the Schedule Reports Module open, you would simply click on the **Window** drop-down menu, and click on Clock Ring Reports Module.

## **MODULE THREE**

# **The Employee Menu**

## **INTRODUCTION TO MODULE THREE**

As a supervisor, you are responsible for ensuring that your employees record their time accurately each day, maintain a regular schedule, and properly account for any temporary change of schedules an employee may have. In this module, you will learn:

- ✓ How to obtain a time badge for an employee.
- ✓ Navigate in the Employee Maintenance Module
- ✓ Change an employee's schedule temporarily.
- ✓ View employees' leave balances and usage

## **THE BADGE MAINTENANCE MODULE**

Updates within the Badge Maintenance Module are limited to authorized users (normally the TACS Staff).

In the Badge Maintenance Module, TACS Users can view active and deactivated badge information to determine the employee's badge type (regular or authorizing (supervisor)), sequence code, and activation/deactivation dates. When the first badge is initially activated for an employee, it is assigned Sequence "0." If an employee loses a badge, the badge is deactivated in TACS and the next sequence number (i.e., "1") is assigned to the new badge. If the employee uses a badge that does not have this "active" sequence number, the employee's clock rings will not process. These unprocessed rings will be found only in the Raw Ring Error Report.

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There are ONLY three types of badges that can be created for employees (Types 1, 2 & 7).

<b>Type 1:</b>	<b>Permanent Regular Badge</b>
<b>Type 2:</b>	<b>Permanent Authorizing Badge</b>
Type 3:	Not currently in use
Type 4:	Not currently in use
Type 5:	Not currently in use
Type 6:	Not currently in use
<b>Type 7:</b>	<b>Rural Carrier Badge</b>
Type 8:	Not currently in use
Type 9:	Not currently in use

Normally, an employee should only have **one** badge; however, an exception to this would be when an employee works in multiple offices and is issued duplicate badges (Same Type/Sequence) for each office. All badges should be secured from unauthorized access. (F-21, 142.2; F-401 (5A; 5G, 5H)).

Supervisors will be issued a Type 2, Authorizing Badge. This badge serves a triple purpose and in Module 7 you will see how to use the EBR to enter data in TACS.

The Authorizing Badge will enable you to add, change and delete clock rings, input leave and address instances of overtime for your employees at the EBR. Most everything you have access to do in the Clock Ring Editor, you can also do using your authorizing badge at the EBR. In fact, authorizing overtime on the EBR can be easier than doing it on a personal computer.

It will also enable you to restart an EBR should one lose power.

Finally, you can use it as a badge to record your own time. You can swipe an authorizing badge in the same way a craft employee swipes a Type 1 permanent regular badge.

**NOTE: TIME CLOCK EMPLOYEES ARE NOT AUTHORIZED TO UPDATE THEIR OWN EMPLOYEE RECORD.**

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All EAS time clock employees may be given credit for working a full work week in TACS via the system automatically posting their daily clock rings. This may be requested of and approved by an authorized User (normally the TACS Staff). This is activated by checking the 1261 indicator in the *Job Assignment Tab* of the “Employee Maintenance” file.

All employees who receive premium pay such as night differential (Code 54); Sunday premium (Code 72); and/or additional straight time (Code 35) are required to swipe the clock OR have supportive PS Forms 1260 or 1261. This includes, but is not limited to, EAS Non-Exempt, Regular Exempt and Special-Exempt employees (See F-21 141.2).

- EAS Exempt employees are not entitled to OT and timekeeping mostly involves leave entries thru eRMS. Unless otherwise directed by local senior management, all EAS Exempt Employees are activated to receive automatic clock rings.
- EAS Special-Exempt employees qualify for extra straight time for all hours worked when the work hours are in excess of 8.5 on a scheduled day and/or all hours worked on non-scheduled day or designated Holiday. They may be placed on “auto rings” at local discretion. These employees are instructed to use their Authorizing Badge to swipe rings on days they work something other than their assigned schedule in TACS and when working their Holiday or scheduled day off. These badge swipes will override those automatically generated by TACS. If the extra work is prior to the beginning of the tour, the supervisor should swipe the BT and the ET to receive credit for all hours worked. If employee swiped only a BT, TACS will generate the OL, IL & ET sufficient to pay him 8 hours.
- Badges should also be used to create manual OL and IL if it differs from assigned schedule; otherwise, the lunch rings will always automatically populate based on the time/duration of the supervisor’s active job assignment, **unless**:
  - Overridden/replaced by the employee using their badge when deviating from their lunch schedule.

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- Deleted (automatically) when Code 93 (No Lunch Punch Authorization) has been approved and input by their manager.
- Alternatively, the supervisor can provide a Form 1260 or Form 1261 to his manager who then manually enters the correct BT and/or ET in the Clock Ring Editor and authorizes the additional work time.
- EAS Non-Exempt time clock employees are EAS employees that qualify for overtime after 40 hours of actual work (exclusive of leave). They may be placed on “auto rings” at local discretion. If receiving automatic clock rings, they should use regular or authorizing time badges (as applicable to their position) to override those automatically generated by TACS when deviating from their base schedules. (See additional instructions in special-exempt section above.)

Because the automatically generated rings are uploaded on Friday of week 2 of the pay period, per the designated Pull Time Schedule (Appendix 4), the input for additional supervisory work on Fridays needs to be timely. If a supervisor is working extra straight time on day 7 of week 2, they should ensure their rings are input or employee’s time placed on “hold.”

## THE EMPLOYEE MAINTENANCE MODULE

The Employee Maintenance Module contains information for each employee in TACS. This information is updated daily (except Sundays) by the HR to TACS process. Only authorized users (normally the TACS Staff) is permitted to make changes to Employee Master Files in this module. All other users may be granted View Only access.

When the user first enters the “Employee Maintenance” Module, the *Employee Tab* screen will appear. An EIN must be entered before any other tabs are activated.

**Start Pay Period** - indicates the year/pay period during which the employee began in the Postal Service.

**Start Date** - gives the actual date of hiring, useful for determining seniority, and is downloaded from the mainframe.

**Employee Status** - indicates if the employee is (A)ctive, (P)ending or (T)erminated.

**Automatic Higher Level Indicator** - must be checked for the employee to be paid higher level automatically when using certain Operation Numbers, as long as he/she is of the correct DA Code and LDC.

**Borrowed Employee Indicator** - is checked when an employee is borrowed from another TACS instance and added to the local TACS instance. The borrowed employee can be issued a badge and use the EBR, which can be tracked using the various TACS work hour usage reports. However, these hours will not be sent to the mainframe for payment. The borrowed employee's time must be entered and paid from their home TACS instance.

**Transferred Employee Indicator** - is used by an authorized user (usually the TACS staff) when:

- an employee transfers to another district within the TACS instance and the Form 50 has not yet been processed
- a late Form 50 action has been rejected by TACS

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Checking this indicator is designed to allow the TACS user of the gaining office to view and edit an employee's record until such time as the transferred employee's record has been updated to reflect the correct indicative data (FN#, PL, etc.).

Unfortunately, once the Transferred Indicator is checked, there is no way to restrict access to this employee's time records to only the gaining office. Checking this indicator allows EVERY user within that TACS instance to view and edit that employee's record/time until such time as the Transferred indicator is unchecked.

This indicator should only be checked in EMERGENCY situations and must be tightly coordinated with the gaining District so that they IMMEDIATELY uncheck it as soon as the employee's record has been manually updated.

**NOTE:** An alternative to using the Transferred Employee indicator would be for the TACS Coordinator of the gaining office to give himself/herself access to the losing finance number and update the record as needed.

**Time Collection Indicators** - denote whether the employee is in a time clock (EBR) or time card office.

**X-Ref** – has been deactivated,

Additional employee information can be accessed from this module by selecting a Tab on the top of the screen:

- Job Assignment/Weekly Schedule Tab
- Daily Varied Schedules Tab
- Daily Schedules Tab
- Prior Assignments Tab
- Leave Information Tab.

We will briefly discuss each of these tabs.

### **JOB ASSIGNMENT/WEEKLY SCHEDULE TAB**

Each employee has one base job assignment active for any given year, pay period and week, unless the employee's status is "terminated." When the user selects the *Job Assignment/Weekly Schedule Tab* from the "Employee Maintenance" Module the following window will appear. Much of the information on this screen is also available from the Clock Ring Editor when you click on the "Job Assignment" button.

Schedule ID	Rotating Week	Begin Tour	End Tour	Begin Lunch	Lunch Duration	Schedule Type
Primary: 16	1	14.50	23.00	18.00	00.50	P
Holiday (10/4):						

The “Add” and “Delete” buttons are available only to authorized users (normally the TACS Staff).

Temporary assignments of a week or longer are entered here with a “T” in the “JA Type Code” box.

In the “JA Type Code,” you will see a “B” for Base assignment, “T” for a temporary job assignment and “R” for a rural assignment. You can toggle back and forth between the base, rural and temporary assignments by clicking on the “Diff Wk/JA” button on the right.

On the right side of the window, there are eight indicator boxes that only authorized users have access to update.

- 1261 - when checked, will automatically generate basic clock rings (BT, OL, IL, ET) based on the active job assignment schedule.
- Auto lunch - when checked, will automatically generate only lunch rings based on the employee’s schedule (An example of an employee who would qualify for this would be field maintenance employees).
- Allow Repl Carrier – is used for rural carriers only and allows input of replacement carrier on rural timecard entry modules.

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- Variable EAS – reflects that an EAS exempt employee may be eligible for premiums based on a schedule change. If an EAS exempt employee's schedule is changed to include evenings, he/she may be eligible for night differential. If checked, this employee's time will not be extracted to the mainframe until the final upload on Monday.
- Daily Varied Schedules – when checked, will allow an authorized user (normally the TACS Staff) to enter or modify a variable schedule for an employee.
- “CRE Leave” – when checked, allows authorized TACS Users to enter leave for that employee in the Clock Ring Editor, without being routed to eRMS. This indicator should not be activated unless an emergency situation exists. In non-emergency situations, leave should be entered via the eRMS application.
- FT Flexible – if checked indicates this employee is a full time flexible employee. If DA = 2x-x, the employee is NTFT and is eligible for Out of Schedule (OOS) premium. If DA is not = 2x-x, employee is not NTFT and is **NOT** eligible for OOS.  
**NOTE:** If the employee is a DA 2x-x, TACS will auto-populate the FT Flex Indicator if appropriate. If the employee is NOT a 2x-x the FT Flex indicator must be updated manually by an authorized user (usually the TACS staff).
- NTFT – is automatically populated by TACS based on the employee's DA Code. When checked it indicates the employee is a non-traditional full time employee.

The Weekly Schedule is populated each week by the “open” process. Only authorized users (normally the TACS Staff) are permitted to make changes to these fields when appropriate.

### DAILY VARIED SCHEDULES TAB

When the “Daily Varied Schedules” Indicator is checked in the *Job Assign Weekly Tab*, authorized users (normally the TACS Staff) may access this tab to enter or modify a schedule that is different on each day of the week.

This information is also populated by the HR to TACS process based on schedule in HRSSC. Schedules on this tab carry forward to future weeks.

Employee Maintenance Module v2.017

TAC500F0 Employee Maintenance Module 13-Mar-2012 Restricted Information

Employee Job Assign/Weekly **Daily Varied Schedules** Daily Schedules Prior Assignments Leave Information

Employee ID: [ ] Name [ ] [ ] [ ] (Last/First/MI): [ ] [ ] [ ] Clear

Job Assignment Type Code: B Effective Start Date: 2012-07-1 Find

	Begin Tour	End Tour	Begin Lunch	Lunch Duration	Day Off
SATURDAY	01.00	07.00	07.00	00.00	<input type="checkbox"/>
SUNDAY	01.00	07.00	07.00	00.00	<input checked="" type="checkbox"/>
MONDAY	01.00	07.00	07.00	00.00	<input type="checkbox"/>
TUESDAY	01.00	07.00	05.00	00.50	<input type="checkbox"/>
WEDNESDAY	01.00	07.00	07.00	00.00	<input type="checkbox"/>
THURSDAY	01.00	07.00	07.00	00.00	<input type="checkbox"/>
FRIDAY	01.00	07.00	05.00	00.50	<input type="checkbox"/>

Sum: 35.00 Descriptions of these new fields can be found via the Help button located in the lower right hand corner of this screen. Add Delete Diff Wk/JA Save Close Help

Base Hours: 35.00

DS Hours: 35.00

Form 50 Hours

### DAILY SCHEDULES TAB

The purpose of the *Daily Schedules Tab* is to allow temporary modifications to be made, on a day to day basis, to an employee's schedule. You must first access the employee using the *Employee Tab*, then the *Job Assign/Weekly Tab*, before you can use this feature. The schedule populated in this tab is from the active schedule (base or temporary) contained in the *Job Assign/Weekly tab*.

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## TACS TRAINING

Supervisors may have access to make temporary schedule changes for their employees based on local District policy and with proper documentation (PS Forms 1723, 3189, etc.).

### **TEMPORARY SCHEDULE CHANGE**

In the “Employee Maintenance” Module, Daily Schedules Tab, you may have the ability to temporarily change an employee’s schedule for the current week. Changes made here are only good for the current week. When the next week opens, the employee’s active schedule (base or temporary) will re-populate.

There are two primary reasons for changing an employee’s scheduled days off, and depending on the reason, employees may or may not be entitled to additional compensation.

- Personal Convenience (PS Form 3189)
- Operational Reasons (PS Form 1723)

When changing an employee’s scheduled day off, first verify you are in the correct PP and Week by viewing the “Effective Start Date” in the upper portion of your window. Be very careful as to which day you change. If the wrong day is indicated, the employee could get LWOP for one day and OT for the other day.

To change a day off to a work day, uncheck the “Day Off” column box. To identify a different day off, simply check the box that corresponds with that specific day. Then select save.

The TACS system will re-compute the holiday if there is a change of days off in a holiday week. It will also re-compute the Sunday premium eligibility if it is affected by a days off change.

Unless the change is for personal convenience (PS Form 3189 required) and meets a qualification that exempts employee from being eligible, a change in starting time could result in the employee being eligible for Out-of-Schedule (OOS) premium (Code 73). When management directs a temporary schedule change for operational reasons and the circumstance/reason entitles the employee to OOS premium, a Form 1723 is completed and the Out of Schedule box can be checked to automate

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payment. OOS premium may also be entered manually by adding a Code 073 entry in the Clock Ring Editor. For assistance determining OOS Premium eligibility, see ELM 434.6, F-21 Section 232, and F-401, Section 3-D. Clarification/interpretation of these sections is provided by Compensation, Labor and/or HR offices.

### PRIOR ASSIGNMENTS TAB

Any prior assignments the employee has held are listed here. This will display a running history of the employees' base and temporary job assignments.

Employee Maintenance Module v2.017

TAC500FO Employee Maintenance Module 13-Mar-2012 Restricted Information

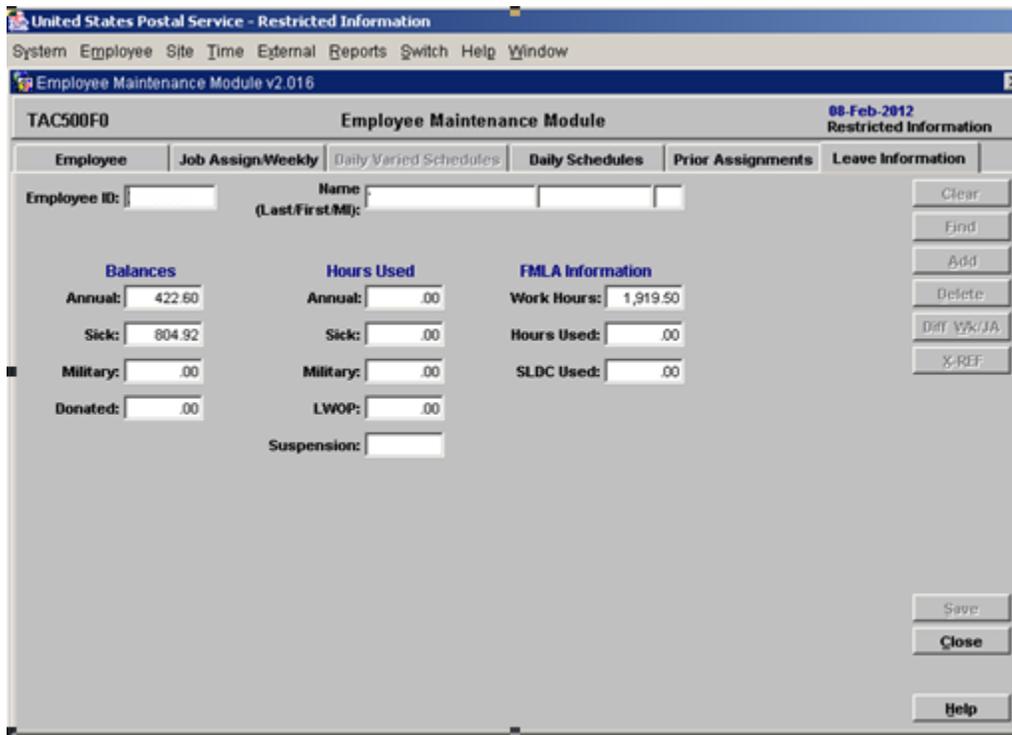
Employee Job Assign/Weekly Daily Varied Schedules Daily Schedules **Prior Assignments** Leave Information

Employee ID: [ ] Name [ ] (Last/First/MI): [ ] [ ] [ ] Clear

Job	Start	End	RSC	DA	Level	LDC	Oper	Finance	Unit	Pay	NTFT	DS Hours
B	2012-07-1		P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-06-2	2012-06-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-06-1	2012-06-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35.02
B	2012-05-2	2012-05-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-05-1	2012-05-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-04-2	2012-04-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-04-1	2012-04-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-03-2	2012-03-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-03-1	2012-03-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-02-2	2012-02-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-02-1	2012-02-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-01-2	2012-01-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2012-01-1	2012-01-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2011-26-2	2011-26-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2011-26-1	2011-26-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2011-25-2	2011-25-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2011-25-1	2011-25-1	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35
B	2011-24-2	2011-24-2	P	21-5	06	1400	0500	55-0882	0000	003	<input checked="" type="checkbox"/>	35

Save Close Help

**LEAVE INFORMATION TAB**



The *Leave Information Tab*, in the “Employee Maintenance” Module, is populated based on the EIN entered on the *Employee Tab*. Leave balances are updated by Eagan Mainframe on Thursdays after the close of the pay period. Balances displayed will be current from close of the prior pay period.

The Leave information is based on the Leave Year and is for display purposes only.

eRMS provides supervisors with real time leave data, automatic, system-generated PS Forms 3971 and PS Forms 3972. It also has administrative, FMLA monitoring and Reports functions that provide management with tools necessary for managing all aspects of leave.

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## **MODULE FOUR**

# **The Time Menu**

## **INTRODUCTION TO MODULE FOUR**

As a supervisor, you are responsible for authorizing/certifying your subordinate employees' time to ensure that it is accurate and in accordance with Postal Policies, National Contracts and Federal Law (Fair Labor Standards Act or FLSA).

Additionally, you will address attendance, scheduling and overtime issues, enter leave, authorize higher level and, if mistakes are made, process necessary payroll adjustments. *PLEASE NOTE: SOME OFFICES REQUIRE LEAVE TO BE ENTERED/MANAGED VIA ERMS.*

TACS is a tool that will assist you in discharging these responsibilities. It provides you with up to the minute information about your employees and allows you to make changes to employee records in the **Clock Ring Editor** easily, quickly, and without the intervention of other employees. You may use the Clock Ring Error Report in TACS to monitor each of your employee's clock rings. By identifying and correcting clock ring errors **daily**, you will ensure that your employees are paid properly and on time. In addition, you will be able to provide employees with timely feedback regarding behaviors which need to be addressed, such as frequent appearances of 'creep' overtime, tardiness, and incorrect use of the EBR.

Under the **Time** menu, based on your position (permanent or temporary) and User Access, you may also have the ability to use the following modules:

**Rural Clock Ring Editor** – displays all rural clock rings for rural employees in a Rural Time Clock Office. This module allows updates and entries to an employee's record. If there are any errors for the day, a warning or fatal message is displayed. The Rural Clock Ring Editor has the ability to 'process' rural clock rings entered or modified by the user.

**Time Card Entry** - enables a User to enter weekly payroll information for manual timecard offices. All timecard employees' workhour and leave entries (except those listed below) must be manually entered at the end of each week. The following employees are automatically credited for total workhours based upon their Base Job Assignment in Employee File Maintenance.

**EAS Exempt:40 hours Work (Code 52)**

- EAS Level 51 PM's: 12 hours Work (Code 52)  
28 hours Non-Sched Time (Code 76)
- EAS Level 53 PM's: 24 hours Work (Code 52)  
16 hours Non-Sched Time (Code 76)
- EAS Level 55 PM's: 36 hours Work (Code 52)  
04 hours Non-Sched Time (Code 76)

Unless a modification to the existing record is needed, no further action is required for these type employees.

**1314 Entry** and **1314A Entry** - allows users to enter bi-weekly payroll information for manual rural timecard offices. At the end of each pay period, the information from rural time certificates is entered and uploaded to Eagan Mainframe for payment.

**LTATS Entry** – Manual loan, training and transfers entries for current or prior periods are entered using this module.

**PPWK Holds** (TimeCLOCK offices only)

**Individual Hold** – This type of hold is used to prevent an individual employee's time from uploading to the mainframe prior to Monday close in Week 2. Unless released, the employee's time will remain available for further review and correction until the final extraction to mainframe on Monday at the final closeout.

**Pay Location Hold** – This is used to prevent an entire pay location from uploading to the mainframe on Friday in Week 2. A pay location hold, unlike an Individual Hold, expires on Saturday (see Pull Time Schedule - Appendix 4).

**In this module you will learn to:**

- ✓ Add, change, delete, and duplicate clock rings.
- ✓ Enter higher level information for employees daily.
- ✓ Assign appropriate reason codes and input leave for employees - unless the office uses the eRMS application to enter leave (reference Appendix 3 for further clarification).
- ✓ Monitor and address instances of overtime worked without a corresponding Code 091 entry.
- ✓ Disallow time, when appropriate (See ELM 432.711; F-21 146.22 thru 146.251).
- ✓ Enter a LTATS transfer
- ✓ Place your employees' rings on hold

**Timecard Entry and Rural Timekeeping (REBR and manual RTACS) are separate courses and will not be covered by this training manual.**

## **THE CLOCK RING EDITOR**

Normally, craft employees record four basic clock rings (BT, OL, IL, ET) daily on an Electronic Badge Reader (EBR). City carriers' four basic rings are BT, MV to street, MV to office and ET. In addition, employees record their time spent on various operations by using the MV (move) transaction on the EBR. The information recorded by the EBR is polled by TACS continuously and rings are displayed in the "Clock Ring Editor".

The "Clock Ring Editor" Module contains employee clock rings, where you can authorize/certify corrections to ensure that all subordinate employees have the correct combination of work and leave hours as dictated by their schedules.

You correct clock rings by adding, changing and deleting, as appropriate.

You add a ring when an employee forgets to swipe his badge at the EBR or loses his badge (PS Form 1260 or 1261 required for missed BT, OL, IL, and/or ET).

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You change a ring when an employee uses an incorrect Operation Number, when you wish to transfer hours from one local unit to another, or when you document an employee not working on overtime and you disallow the OT.

You delete a clock ring if it is erroneous (i.e., a duplicate BT or IL, or a move to an inactive operation).

Any time a ring is changed, TACS records the EIN of the individual who changed it, along with the date and time of the change.

**NOTE: The Office of Inspector General (OIG) audits timekeeping records, and changing clock rings without appropriate cause and documentation is illegal.**

TACS follows a weekly cycle. Day 1 of the week is Saturday, which makes day 7 Friday. When the week is complete, the weekly information is uploaded to Eagan for processing. In order for employees to be paid properly, their rings must be accurate in TACS. If employee clock rings are not accurate, a payroll adjustment may be necessary. Previously, it was thought the average cost of a single payroll adjustment to be \$75; however, since the implementation of Adjustpay there has been no new study. It is important to note that we currently process, on average, 2 million payroll adjustments every year. The majorities of these adjustments are basic and higher level work hour errors and incorrect leave entry errors, all of which are preventable by the employees' immediate manager/supervisor if closer attention was paid to employees' time.

Thus, it is incumbent upon you to ensure that your employees' rings are correct **EACH AND EVERY DAY.** It is critical that you run and use the following reports **EVERYDAY** to identify and correct employees' time in the Clock Ring Editor.

1. Clock Ring Error Report – Address all issues to the extent possible. Re-run to ensure your corrective entries had the desired effect,
2. Missing Time Report – Address all issues to the extent possible. Re-run to ensure your corrective entries had the desired effect.
3. Missing 091 Transaction Report – All instances of overtime must be addressed by *entering Code 91 and identifying the overtime as scheduled (Y-*

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*Yes) or unscheduled (N-No). Re-run to ensure your corrective entries had the desired effect.*

4. Unscheduled Overtime Report – Document all unscheduled overtime worked without prior supervisor approval on PS Form 1017B.
5. Hours Type Inquiry Report (Codes 53, 43, 62, 68), at the beginning of your tour, to identify instances of overtime, penalty overtime or guarantee time. Re-run to ensure your corrective entries had the desired effect.

If you follow this practice, it will prevent you from being inundated with corrections at the end of the week and, more importantly, will ensure that the daily and weekly TACS reports you and higher level management review are accurate.

**IMPORTANT NOTE: If your employees clock correctly on the EBR, there will be very few rings to correct.**

After the end of week one of the pay period, all of the employee hours are uploaded on the following Monday (see Appendix 4 for Pull-Time Schedule). After the end of week two of the pay period, employees' hours are reviewed and uploaded four times. Full time employees whose rings are in a "ready" status are uploaded on Friday, Saturday or Sunday. All other employees (excluding NTFTs and rural) in a "ready" status are uploaded on Saturday or Sunday. Rural timeclock and timecard employees are uploaded Sunday or Monday. On Monday, all of the remaining employees' hours are uploaded, whether corrected or not. Uploading multiple times at the end of the pay period allows for advanced processing of payroll beginning Friday night (see Appendix 4 for Pull-Time Schedule).

**Note: PTRs, PTFs, TEs and Casuals are not pulled on Fridays. NTFTs hold until Monday.**

There are potentially two weeks of information displayed for each employee, as a future week opens on Thursday of every week. Since the week closes on Monday, from Thursday to Monday TACS will have 2 weeks open simultaneously. If the employee's time has been uploaded to Eagan, TACS will display the information but will not allow you to change any clock rings.



## **Radio Buttons**

Edit Week - provides you with three radio buttons (Current Week, Previous Week or Week Closed and Future). The default is set to current week. It is important to monitor this field to ensure you are working in the correct week.

- Current Week - allows you to enter and change rings for the current week.
- Previous Week - allows you to view the rings, but prevents you from changing them, as the data has been uploaded to Eagan.
- Closed Week - is closed and cannot be viewed.
- Future - will allow you to enter authorizations such as higher level up to three weeks in advance.

Extended Leave – when activated, allows you to enter multiple full days of leave by adding only one entry of total hours. NOTE: If you use the eRMS application to enter your employees' leave, do not make entries into TACS. When future leave is entered into eRMS, it automatically transfers this leave to TACS when that specific week opens.

If you run into problems when entering leave into eRMS, contact your local TACS Office to request authorization to input directly into the Clock Ring Editor. They do this by activating a CRE Leave option on the employee's active record (base or temporary) in Employee Maintenance Module. After the close of week, ensure entries in eRMS are accurate.

Show Rings – Provides you with two radio buttons (All and Active). All is the default and displays all rings, including deleted. Active, when selected, hides all deleted rings so that you are viewing only "active" rings.

Ring Coloring - Provides you with two radio buttons (On and Off). The default is set to On and uses two different colors that separate the days of the week. If you would prefer no color, click the "OFF" radio button and all lines will be white.

## **FINDING AN EMPLOYEE'S RECORD**

To pull up an employee's record, you may simply type in the employee identification number (EIN) or the social security number (SSN), if known, and hit "enter" or "tab" on your keyboard. If you do not have the EIN, you may search by name using the F9, <Alt>F or "Find" button in the application window to obtain a list of employees.

When the list of values appears, you may immediately, **without clicking or positioning your cursor**, begin typing the last name. As you type, "auto find" is activated and the letters are filled in to the left of the percent sign as your list narrows. "Auto Find," when used, always searches in the first column, regardless of the search field you are using.

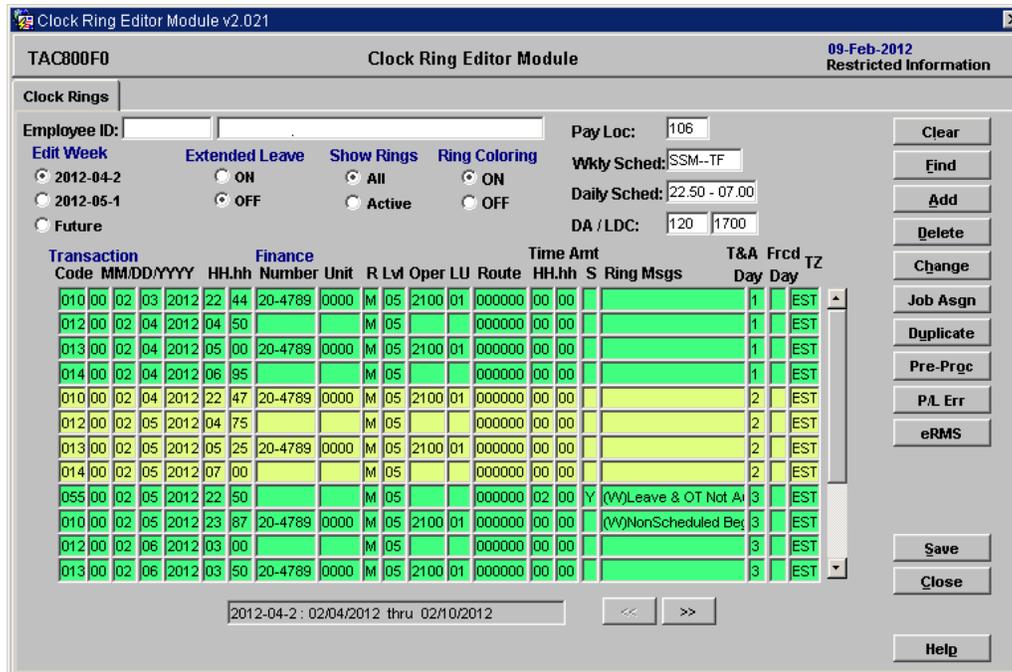
## **HOW THE "MANUAL" FIND FEATURE WORKS**

There are 4 columns in Find (Last Name, First Name, Middle Initial and EIN). To manually search in the first column (Last Name), place your cursor to the left of the percent sign, type the Last Name. When you click on the "Find" button at the bottom of the window or press <Enter> all employees with Last Name that begins with or includes what you entered will be displayed.

To manually search in any fields located to the right of the first column (First Name Middle Initial and EIN), you must position the cursor and enter your search criteria to the right of the % sign. For example, to find an employee by their First Name, place your cursor to the right of the % sign and type the First Name. Click on the "Find" button at the bottom of the window, or press <Enter> and all employees with that first name, or those containing a portion of that first name, will appear.

To find an employee by only a portion of the ID number, key in the portion you know to the right of the % sign, then click on the "find" button or press <Enter>.

When you select an employee, the Clock Ring Editor will auto populate with the employee's indicative data, inclusive of clock rings.



The last column above the editor screen displays information about the employee, specifically Pay Location, Schedule, D/A, and LDC.

## HEADINGS

Before we begin working on clock rings, we will review the columns in the Clock Ring Editor (CRE).

Transaction			Finance				Time Amt				T&A		Frcd	TZ	
Code	MM/DD/YYYY	HH.hh	Number	Unit	R Lvl	Oper	LU	Route	HH.hh	S	Ring	Msgs	Day	Day	

Transaction Code - is a 3-digit code with a leading zero (0) and is used to identify ring or leave types. It may also be followed by or associated with a 2-digit reason code (Reference Appendix 3).

Transaction MM/DD/YYYY - date of the clock ring in MM/DD/YYYY format.

Transaction HH hh - the effective time of the clock ring - in hours and hundredths

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### *TACS TRAINING*

Finance Number – indicates where the hours will be charged. When the ring is associated with work hours (BT, MV, IL) a finance number must be included. This field is automatically populated based on the employee’s active job assignment in the Employee Maintenance Module (permanent or temporary). It can be changed manually in the Clock Ring Editor by an authorized user. Also, the employee may override when swiping their badge by using the Transfer key on the EBR.

Unit – Not in use at this time

R - Rate Schedule Code: Normally, you will use only 4 RSC codes—M=Mail Handlers, P=APWU represented employees, Q=NALC (city letter carriers), and E=Executive and Administrative/Casuals (EAS).

Lvl – employee’s pay level. This field can only be edited when entering a higher level authorization. Otherwise, all rings will auto populate with employee’s level based on active job assignment in Employee File Maintenance (permanent or temporary).

Oper - Operation Number: is a 4 digit code with trailing zero (0). **Unlike the Hours Codes, which will accept a two-digit number, this field requires four digits.** The expansion of these numbers will allow a finer breakdown of information in the future.

LU - Local unit: is a 2 digit code, if created/activated, allows management to further isolate and report on operations using various reports within TACS.

Route - Route number is a 6 digit code used in conjunction with city and/or rural carrier operations. It identifies the route in which the workhours will be charged. This field will auto-populate all other employee rings with all zeros (000000).

Time Amt - total hours (in hours and hundredths); i.e. duration of H/L, OT, leave, etc.

S - Scheduled:

- Was leave scheduled - “Y” for Yes or “N” for No. Although users have access to this field, modifications are normally not necessary, as it is auto-populated based on leave entries from eRMS.

## *DRAFT*

### *TACS TRAINING*

- A future enhancement will be implemented soon to allow users to identify instances of overtime as either scheduled or non-scheduled - “Y” for Yes or “N” for No. With this enhancement, all instances of overtime must be addressed with a 091 entry (overtime authorization) which should include the time the overtime began, the specific amount of overtime the employee is entitled to and whether scheduled (Y) or unscheduled (N).

Ring Msgs - There are two kinds of error messages, and you need to pay attention to both.

- **Fatal (F)** errors appear in red and they prevent the employee from being paid correctly for that day. When there is a fatal error, and the system is able to detect the specific problem ring, only that specific ring will be displayed in red and show the entire message (i.e. if missing an ET, only the BT Ring will be displayed in red with the fatal error message). When there is a fatal error, and the system is not able to detect the specific problem ring, all of the rings on that day will be displayed in red and show the message “Fatal Error,” When that error is corrected, all of the “Fatal Error” messages for that day will disappear. All fatal errors must be corrected DAILY to ensure that management reports contain accurate data.
- **Warning (W)** messages address issues other than fatal errors, but should also be reviewed. They may be informational only (i.e., “Nonscheduled Begin Tour”) or may require action (i.e., an instance of “Unauthorized Overtime” that needs to be authorized with a Code 91 entry (overtime authorization). Unlike Fatal errors, which disappear when the error is corrected, most warning messages do not disappear (i.e., “Nonscheduled Begin Tour/End Tour”).

T&A Day (Time and Attendance Day) – There are 7 days each week and based on the employee’s date and time of swipe, this field is auto-populated. A “0” in this field identifies a ring the system has not yet applied to the appropriate service day. The zero changes to the correct T&A day when the ring is processed.

Frcd Day - Forced Time and Attendance Day, when appropriate, allow users the ability to force a ring to a different service day. The T&A day begins and ends at 20:00 hours.

## DRAFT

### TACS TRAINING

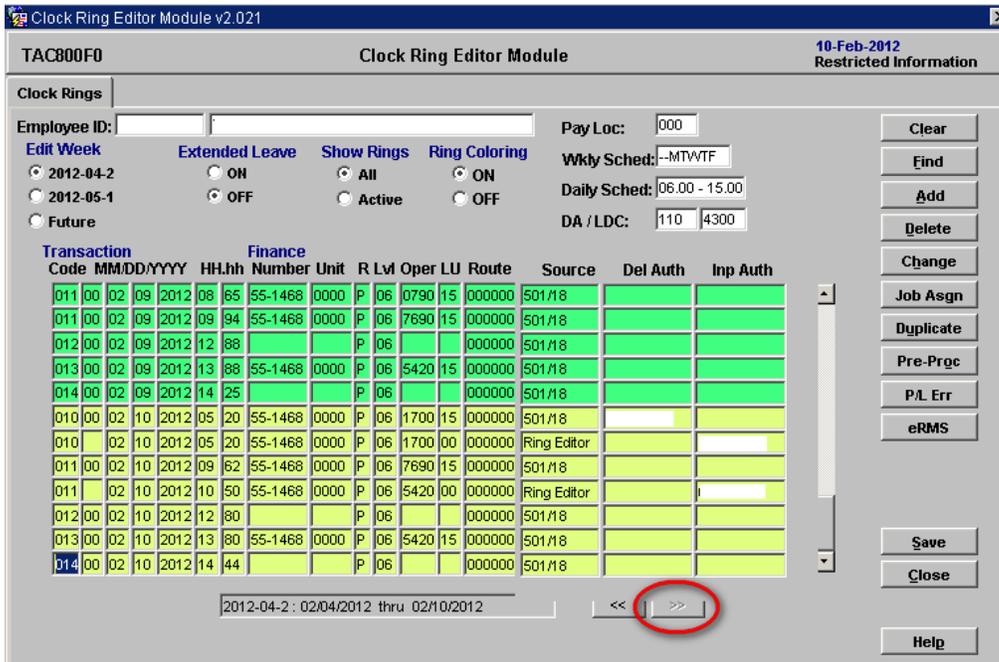
- The following employees' time and attendance day is determined by their **"SCHEDULED"** Begin Tour recorded in the Employee File Maintenance Module, Daily Schedule Tab.
  - Full Time (FT): DA 0x-x and 1x-x
  - Part-Time Regular (PTR): DA 3x-x
  - Non-Traditional Full Time (NTFT): DA 2x-x
- The following employees' time and attendance day is determined by their **"ACTUAL"** Begin Tour. TACS ignores the scheduled BT located in the Employee File Maintenance Module. Exception: If there is a leave authorization at the beginning of the tour (prior to the actual BT), the time the leave begins will determine the service day.
  - Part-Time Flexible (PTF): DA 4x-x
  - Transitional (TE) and Postal Support Employees (PSE): DA 8x-x
  - Casual: DA 6x-x
  - Other Temporary Employees: DA 5x-x

TACS will most always apply the correct service day for the employee. However, on those rare occasions where it does not; please contact your local TACS Office **PRIOR** to changing the time and attendance day using this feature.

TZ – Time Zone. Although you have access to modify this field, it is not necessary, **as it is updated via program changes downloaded to the EBR's**. This field is to be used ONLY in the following instances:

- When an employee works in two facilities in a given day in different time zones.
- When a ring is added or changed after the time zone is updated, it may be necessary in the week of the change to modify to current time zone as Saturday's rings will be one TZ and the days thereafter will be a different time zone.
- When the update to the EBR failed and rings continue to be recorded with the wrong time zone.

When you click on the double arrows on the lower right, THREE additional columns in the Clock Ring Editor are displayed.



Source – Indicates from where the ring was generated.

- 999-99-9999: auto-generated by TACS (1261 checked)
- # # # / # #: the Network/EBR the ring was swiped on
- eRMS: leave entered via eRMS application
- Ring Editor: ring entered on computer via Clock Ring Editor

Del Auth - EIN of the individual who deleted the ring.

Inp Auth - EIN of the individual who input the ring.  
(xxxxx9999 indicates the action was system-generated)

Now that we have examined the header information let's look at the remaining buttons on the right side of the screen.

### Job Assignment Button

The “Job Assignment” button on the right side of the screen displays additional information about the particular employee’s job assignment. It also includes leave balances. It pulls this information from two tabs in the “Employee Maintenance” Module: the *Job Assgn/Weekly* and the *Daily Schedules* tabs. This is a view-only window. Changes to an employee’s job assignment can only be made by authorized Users (normally the TACS Staff) in the Employee Maintenance Module.



## DRAFT

### TACS TRAINING

The bottom section shows the actual rings in the Editor, inclusive of unsaved changes made. Thus, if a ring is corrected in the Clock Ring Editor but not saved, the Pre-Processor will display what the editor will look like if saved.

We mentioned earlier that the Clock Ring Error Report and the Pay Location Error Report will assist you in identifying errors. I want to reiterate that if you make a habit of correcting the previous day's errors every day, your timekeeping duties will not take long. You will be able to correct many of these errors immediately, by yourself, while others may require discussion with individual employees.

Below are excerpts from a Clock Ring Error Report. The first example is that of a city letter carrier and the second is an example of a clerk.

Employee ID	Employee Last Name	F	M	Base D/A	Base RSC	Exempt Code	Sched BT	Sched ET	Schedule	Lunch		
		I	I	43-4	Q0	N	08.00	16.50	SSMTWTF	0.50		
Date	Time	Transaction	Amount	Message(s)	Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time
02/10	08.04	BEGIN TOUR		(F)End Of Tour Missing	7220-00	015052			00.00			00.00
02/10	10.13	OPERATION MOVE		(F)End Of Tour Missing	7210-00	015052			00.00			00.00
02/10	17.95	OPERATION MOVE		(F)End Of Tour Missing	7220-00	015052			00.00			00.00

Employee ID	Employee Last Name	F	M	Base D/A	Base RSC	Exempt Code	Sched BT	Sched ET	Schedule	Lunch		
		I	I	11-0	P0	N	08.00	17.00	--MTWTF	1.00		
Date	Time	Transaction	Amount	Message(s)	Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time
02/10	08.10	BEGIN TOUR		(W)Ring Deleted From PC	6610-00	000000			00.00	XXX-XX-9999	02/10	07.20
02/10	08.10	BEGIN TOUR		Has 05.85 needs 02.14	6610-00	000000			00.00			00.00
02/10	08.10	BEGIN TOUR		(W)Ring Deleted From PC	6610-00	000000			00.00	XXX-XX-9999	02/10	07.20
02/10	12.38	OUT TO LUNCH		(F)Not Full Day On Clock	6610-00	000000			00.00			00.00
02/10	12.40	IN FROM LUNCH		(F)Not Full Day On Clock	6610-00	000000			00.00			00.00
02/10	13.98	END OF TOUR		(W)NonScheduled End Tour	6610-00	000000			00.00			00.00

“Input Auth,” “Date,” “Time” and “Delete Auth,” “Date,” “Time” will show the Employee ID Number of the User that input or deleted the ring, regardless of how it is done (computer or via authorizing badge at EBR).

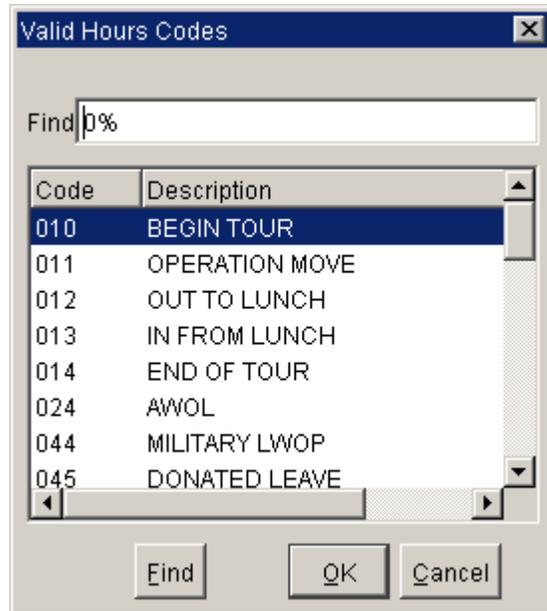
### Add Button

To add a ring to an employee's time, click the “Add” button, or press <Alt> A on your keyboard and your cursor goes to the first transaction “Code” field on a new line. If you already know the code, with the cursor positioned in the first field of the blank line, type it in.

## DRAFT

### TACS TRAINING

What if you don't know the code? With the cursor positioned in the code field, press <F9> or click on the "Find" button and the search window with list of values specific to that field will appear.



All of the codes have three digits. To select from the list, use the scroll bar on the right and highlight the code you want. Then click on the OK button, or press <Enter>. Appendix 3 contains a complete list of Hours Codes and Reason Codes.

When entering data, use <Tab> or <Enter> to advance to the next field. <Shift><Tab> moves back to the previous field.

After you key the hours code and press <Tab> or <Enter>, the remaining entry fields will then auto-populate based on the code entered and the employees' base or temporary assignment. You can advance to each of the remaining fields and modify, as necessary, by continuing to use <Tab> or <Enter>. When you advance through all the fields, the cursor will move automatically to the next row. If you complete your modifications to the existing row prior to reaching the last field, it is not necessary to continue to end. If no other entries are needed, you can immediately click on the "Save" button, or <Alt> S. If additional corrections to the employee's time are required, you can click on the "Add" button, <Alt> A on keyboard to begin a new line.

## DRAFT

### TACS TRAINING

Rings can be entered in any sequence, and when saved, will reposition themselves in sequential date/time order in the Clock Ring Editor. After you enter your rings, the “Pre-Process” button will show you if there are any problems with your entries and will sort them into the proper sequence.

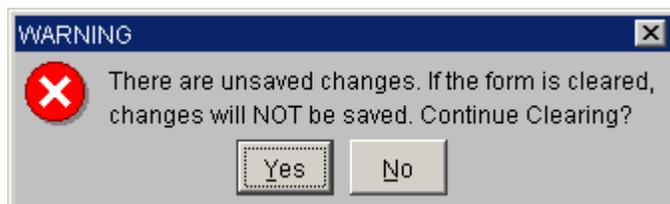
If you click on the “Pre-Process” button, but it fails to open, check to see if your cursor is on a blank line in the editor. The “Pre-Process” button only functions when the cursor is on a line with data in it. If you are on a blank line, click on the “Delete” button to remove the empty line, and try the “Pre-Process” button again.

### Delete Button

To delete a ring from the Clock Ring Editor, you must click in the line/ring you want deleted (It doesn't matter which field). You can click the “Delete” button or press <Alt> D on your keyboard, and the ring will be deleted. That row will turn white and display the message “(W) Ring Deleted from PC” as shown below.

010	00	02	09	2012	14	54	51-7716	0000	P	07	6330	99	000000	00	00	(W)Ring Deleted From	6	EST
-----	----	----	----	------	----	----	---------	------	---	----	------	----	--------	----	----	----------------------	---	-----

The record is not officially deleted until you press the “Save” button. If you accidentally delete a ring, you can press the “Clear” button and the following message will appear:



Since you have incorrectly deleted a ring, click “YES.” This will clear the page and not save the changes you made. You can then start over and make the correct changes.

### **Duplicate Button**

To duplicate a ring from the Clock Ring Editor, you must place your cursor on the line/ring you want duplicated (it doesn't matter which field) and click the "Duplicate" button or press <Alt> U on your keyboard. The ring will duplicate below the original ring, leaving the original ring active and unchanged. You can advance to each of the remaining fields and modify, as necessary, by continuing to use <Tab> or <Enter>, then click the "Save" button, or <Alt> S.

### **Change Button**

Use the "Change" button or <Alt> H on the keyboard when you need to change a ring. The original, saved ring will be marked as deleted, and a new duplicate ring will be generated to allow you to make modifications, as needed.

### **P/L Error Button**

The Pay Location/Error feature allows the user to quickly identify all employees in their Finance Number and Pay Location that have clock ring errors without leaving the Clock Ring Editor and running a report. From the list of employees displayed in this window you can select and correct clock ring errors without leaving the Clock Ring Editor Module. Once employees are displayed, you can select an employee for correction and it will bring them up in the Clock Ring Editor. Once corrected and saved, the pay location/error window will reappear and the next employee identified as having an error will be highlighted. Once selected, it brings that employee up in the Clock Ring Editor for corrections. You can use this toggle feature until you have corrected each employee listed. Once you have reached the last employee listed, click on "Refresh." If all errors have been corrected, your screen will refresh and no employees will be listed.

# DRAFT

## TACS TRAINING

When you first click on the “P/L Error” Button, you will see the following screen:

Finance:  Pay Loc:   All Employees  Errors ONLY

**Error Counts**

Employee Id	Last Name	First Name	M. I.	Fatal	Warning

**Clock Ring Error Report 'missing time errors' do not appear on this pop-up.**

This feature allows you to view one finance number/pay location combination at a time. After entering the Finance Number and Pay Location, you will need to identify whether you want to view “All Employees” or “Errors ONLY.” The default will always be to “Errors ONLY.” After making your selection, click “OK” and the list of employees will appear in social security number order (although not displayed).

The “Fatal” Error Counts field indicates number of rings in fatal error and the “Warning” Error Counts indicates number of rings with warning messages.



*DRAFT*

*TACS TRAINING*

## **OVERTIME AND HIGHER LEVEL AUTHORIZATION**

Overtime and Higher Level are authorized by selecting the appropriate hour's codes and adding them to the Clock Ring Editor in the same way you add missing clock rings.

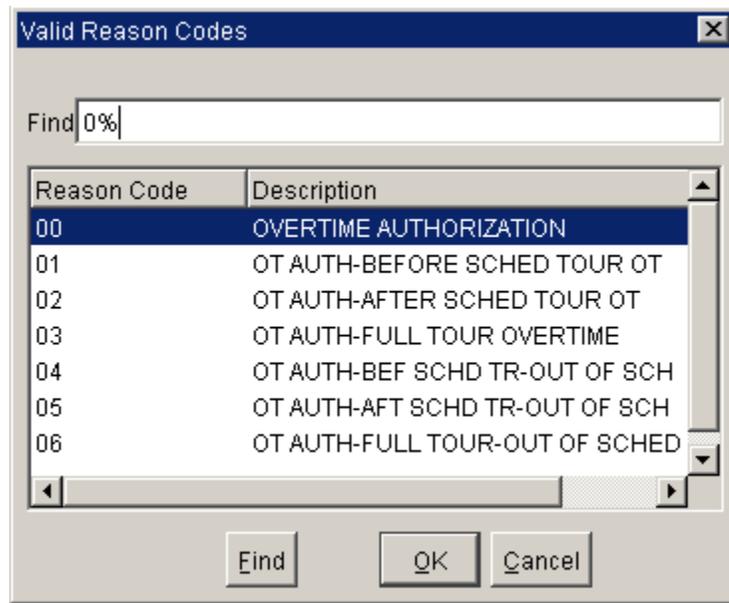
Code 090 authorizes higher level

Code 091 authorizes overtime.

### **OVERTIME AUTHORIZATION (CODE 091)**

All instances of scheduled overtime should be made prior to the employee working the overtime. (i.e. you notify an employee to come in early the following day by 1 hour and you immediately make the 091 Overtime Authorization of 1.00 hour in the Clock Ring Editor beginning one hour prior to scheduled BT). It is important that your 091 entry (OT authorization) is only for the actual amount of overtime that the employee is given permission to work. While the system will pay overtime based on actual clock rings, if your 091 entry is for the exact amount the employee was given permission to work, any hours worked in addition to that will appear on the Missing 091 Transaction Report. For example, you made the 091 entry above for 1 hour, but employee works 1.25. The additional .25 that the employee works will be reflected as "unauthorized" on the Missing 091 Transaction Report. In this way this report can be a valuable tool used for controlling creep overtime.

Although not required, users may select one of six reason codes for overtime authorization entries. (see below). This will allow management to extract reports detailing the "reason(s)" for the overtime authorizations being made.



NOTE 1: Overtime at the end of a regular employee's tour begins at the scheduled End Tour. Overtime for employees that begin tour before their normal scheduled tour begins at the actual time of the Begin Tour.

NOTE 2: Reason Codes 04, 05 and 06 will NOT prompt TACS to calculate out-of-schedule (OOS) premium. OOS premium will only be calculated if you enter a 073 entry or if the OOS Indicator is checked on the Daily Schedules tab.

TACS will pay overtime for employees whether it is authorized or not; however, all instances of overtime should have a corresponding Code 091 (overtime authorization) Entry. The TACS Missing 091 Transaction Report should be blank. All overtime worked without prior supervisor approval must be documented on PS Form 1017B (ELM 434.1; F-21, 146.252; F-401, 5.K.2).

The Plant utilizes a program called Web-MODS that extracts employee clock rings from TACS and when overtime is authorized, a code is generated within Web-MODS indicating that certain hours are in fact overtime. If the overtime is not authorized using correct begin times, Web-MODS may attribute these hours to incorrect operations thereby skewing plant reports.

## **DRAFT**

### *TACS TRAINING*

If the corresponding 091 entry (OT authorization) is not entered, TACS will apply the OT for all hours worked after the first 8 hours – regardless of the schedule listed in the Employee Maintenance Module.

Example: Plant Mailhandler (FN# 35-0061) schedule is 0700 – 1550. Employee works 2 hours OT at the beginning of the tour from 0500 – 0700 at a station (FN# 35-0053) using operation number 7420, then works the rest of the shift (0700 – 1550) at the plant FN# using operation number 2100. If the 091 entry is NOT entered, the OT will be charged to the end of the day from 1350 – 1550 to operation number 2100 in FN# 35-0061 instead of from 0500 – 0700 in FN# 35-0053 on operation 7420.

### **UNAUTHORIZED OVERTIME AND/OR DISALLOWED TIME**

If an employee's rings generate overtime, that overtime must be paid unless you observe or have reason to know the employee was not working. In this event, you would change the appropriate ring, reducing their time worked, and document on PS Form 1017-A, *Time Disallowance Record*. Disallowance of time requires justifiable reason, employee notification and proper documentation (F-21 146.251, F-401 5.K.1).

Federal Law requires you have personal knowledge or reason to believe that the time was not worked. It is not sufficient that you did not approve it ahead of time. The Fair Labor Standards Act (FLSA) requires we pay all time worked, whether or not it was authorized ahead of time by the supervisor. Postal policy states we take appropriate corrective action to prevent this from happening. Corrective action includes, but, is not limited to:

- Badge control
- Recording unauthorized OT on PS Form 1017B
- Informing employees of their clocking responsibilities
- Discipline

Examples of time that may be properly disallowed include, but are not limited to:

- Wash-up time — time spent by employees changing clothes and/or washing up after their tour ends that exceeds the time allotted for such purposes in applicable collective bargaining agreements.

## *DRAFT*

### *TACS TRAINING*

- Waiting time — time spent by employees while waiting to start work at the beginning of a tour when they have not been instructed or otherwise required to wait.
- Personal time — time spent by employees, before their tour begins or after their tour ends, attending to personal matters.
- Mealtime — time spent by employees “on the clock” during a designated meal period, provided, of course, that the employee was completely relieved of all duties and responsibilities and performed no work during this period.

It is important that you complete the Form 1017A in its entirety and document your reason for disallowance along with any comments the employee makes in the remarks section. This applies to both the Form 1017A and Form 1017B. With the first incident of disallowed time, you will need to establish a PS Form 1017A for that employee. Only employees with disallowed time are required to have this form so, hopefully, utilization is minimal. These forms should be secured from unauthorized access in locked cabinets/desk drawers.



## **HIGHER LEVEL AUTHORIZATION (TR CODE 090)**

**(ELM 417.233 AND 422.14 ; F-21, SECTION 421)**

If an employee works in a position that is a higher level, management must review and make appropriate authorizations. When an employee uses the EBR, it is important that they clock to the operation number corresponding to that assignment. All higher level authorization entries require a properly completed PS Form 1723, *Assignment Order*. PS Forms 1723 are also required to record non-higher level management directed assignment changes including, but not limited to:

- Temporary assignment to perform duties other than those in employee's official job description (including training assignments)
- Temporary management directed change to scheduled hours and/or days off

**Frequency:** Form is valid up to 6 months (180 days). A new form is required for assignments exceeding 180 days, or subject to local management discretion.

**Approvals:** Assignments and changes must be approved by immediate supervisor or the manager.

**Signatures:** If employee is unable to sign the form, the supervisor must indicate how the employee was notified in the employee signature space. Details of notification are to be provided in the form's Employee Notification Box.

When working a higher level assignment, higher level pay is not only dependent on proper authorization and documentation, but also dependent on the higher level position to which assigned. Although in most instances, the employee eligibility provides a 5% increase, in some instances employees are not eligible for higher level pay at all or, in rare instances, are eligible for more than 5%. (Reference Higher Level Pay Eligibility Exhibit 421.21 of the F-21)

		<b>Assignment Order</b>	
<b>Instructions - (Please Provide a Copy to the Employee)</b>			
<b>Purpose</b> Complete this form to record management-directed assignment changes involving: <ul style="list-style-type: none"> <li>a. Temporary assignments to perform duties other than those in employee's official job description, including higher level and training assignments.</li> <li>b. Scheduled hours and/or days off when schedule change is not posted.</li> </ul>			
<b>Frequency</b> Form is valid up to 6 months (180 days). A new form is required for assignments exceeding 180 days, or subject to local management discretion.			
<b>Approvals</b> Assignments and changes must be approved by immediate supervisor or the manager.			
<b>Signatures</b> If employee is unable to sign the form, the supervisor must indicate how the employee was notified in the employee signature space. Details of notification are to be provided in the form's Employee Notification Box.			
<b>Current Assignment</b>			
To: (Name)		Position Title	
Home Installation		Employee ID	
Employee Official Tour		Scheduled Days Off	
Begin Tour	End Tour	<input type="checkbox"/> Saturday	<input type="checkbox"/> Monday
		<input type="checkbox"/> Wednesday	<input type="checkbox"/> Friday
Lunch Out	Lunch Return	<input type="checkbox"/> Sunday	<input type="checkbox"/> Tuesday
		<input type="checkbox"/> Thursday	
Des/Act Code	LDC	OPER-LU	Rate Schedule
			Level
			Pay Location
			FLSA <input type="checkbox"/> Exempt <input type="checkbox"/> Nonexempt
<b>New Directed Assignment</b>			
Position Title		FLSA Worksheet (if temporary assignment includes hours outside of (paid) FLSA work week, enter FLSA work week and send copy to FLSA coordinator)	
		<input type="checkbox"/> Friday	<input type="checkbox"/> Saturday
Des/Act Code	LDC	OPER-LU	Rate Schedule
			Level
			Pay Location
			FLSA Exempt to Nonexempt Position <input type="checkbox"/> Yes <input type="checkbox"/> No
Reason for Assignment (If other, explain)	<input type="checkbox"/> Annual Leave <input type="checkbox"/> Vacancy	Employee Type	
	<input type="checkbox"/> Sick Leave <input type="checkbox"/> Detail	<input type="checkbox"/> <b>Bargaining Unit Employee</b> - Notify by Wednesday of week preceding change (Not required for clerk/craft if detailed to a nonbargaining position)	
	<input type="checkbox"/> Scheduled Day Off	<input type="checkbox"/> <b>Nonbargaining Employee</b> - Provide 4 days notice	
Location (Give exact worksite, if route, give number)		Higher Level Authorization Method	
Finance Number		<input type="checkbox"/> Auto Higher Level	<input type="checkbox"/> Daily Authorization
		<input type="checkbox"/> Temporary Job Assignment	<input type="checkbox"/> Timecard 1230-C
Employee Assigned Tour		Scheduled Days Off	
Begin Tour	End Tour	<input type="checkbox"/> Saturday	<input type="checkbox"/> Monday
		<input type="checkbox"/> Wednesday	<input type="checkbox"/> Friday
Lunch Out	Lunch Return	<input type="checkbox"/> Sunday	<input type="checkbox"/> Tuesday
		<input type="checkbox"/> Thursday	
Assignment Start Date	Assignment End Date	Start Date for RSC E or V to E or V Higher Level (5 days after assignment start date)	
Time <input type="checkbox"/> AM <input type="checkbox"/> PM	Time <input type="checkbox"/> AM <input type="checkbox"/> PM	Date (MM/DD/YYYY)	
Supervisor Name (Print)		Supervisor Signature	Date (MM/DD/YYYY)
Employee Signature		Comments on Employee Notification	
Date (MM/DD/YYYY)			
Date Employee Was Notified (MM/DD/YYYY)			

Proper completion of a Form 1723 is vital. Otherwise, hours may be charged to incorrect finance number and/or labor distribution code (LDC) or, worse, employee paid incorrect higher level, which could possibly result in a payroll adjustment. The failure of management to give a written order is not grounds for denial of higher level pay if the employee was otherwise directed to perform the duties of the higher level position.

# DRAFT

## TACS TRAINING

The following table explains each section of the Form 1723.

<b>CURRENT ASSIGNMENT</b>	
To: (Name)	The name of the employee going on detail
Position Title	The employee's Form 50 Base Position Title
Home Installation	The employee's Form 50 Base location
Employee ID	The employee's COMPLETE EIN
Official Tour	The employee's BASE schedule information. You need to complete ALL four blocks.
Sch Days Off	The employee's BASE scheduled off days.
Des/Act	The employee's BASE des/act – You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
LDC	This is the employee's BASE LDC - You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
OPER-LU	This is the employee's BASE OPER-LU - You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
Rate Schedule	This is the employee's BASE RSC - You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
Level	This is the employee's BASE level - You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
Pay Location	This is the employee's BASE Pay Location - You can find in Employee Maintenance Module or the Job Assignment Tab in the Clock Ring Editor
FLSA	Check appropriate box

<b>NEW DIRECTED ASSIGNMENT</b>	
Position Title	Title of position to which temporarily assigned
FLSA Worksheet	Check appropriate day and enter time
Des/Act	Des/Act of temporary assignment
LDC	LDC of temporary assignment
OPER-LU	OPER-LU of temporary assignment
Rate Schedule	RSC of temporary assignment
Level	Level of temporary assignment
Pay Location	Pay Location of temporary assignment
Reason for Assignment	Why are you detailing the employee to this position? Select one of the options.
Employee Type	Select Bargaining Unit or Non-bargaining Employee
Location	Enter the name of the station/branch of the temporary assignment
Finance Number	Enter the Finance Number of the temporary assignment
Higher Level Authorization Method	Allows you to select the method in which the employee receives higher level during the temporary assignment
Assigned Tour	Enter the schedule the employee will assume while on temporary assignment.
Scheduled Days Off	Enter the scheduled days off for the temporary assignment
Assignment Start Date	Enter the start date and time of the temporary assignment
Assignment End Date	Enter the end date and time of the temporary assignment (NTE 180 days)
Start Date for RSC E or V	Employees whose BASE RSC is E or V and are detailed to RSC E or V have a 5-day waiting period before being eligible for higher level pay. Calculate and enter the date immediately following the 5 <sup>th</sup> work day.
Supervisor's Name	Printed Name of Employee's Manager/Supervisor

# DRAFT

## TACS TRAINING

Supervisor's Signature	Employee's Manager/Supervisor must Sign
Employee's Signature	Employee must sign
Comments on Employee Notification	Document any additional information relative to this employee's detail assignment.
Date Employee Was Notified	The date employee was notified they would be going on detail.

### DETAIL FOR LESS THAN ONE FULL WEEK

Although a PS Form 1723 is still required regardless of days/time spent in higher level, when less than one full week, the 1723 is retained on file locally. Each day higher level work is performed, management must manually enter a higher level authorization (Code 90) to correspond with the amount of hours worked in the higher level position that day. The example below reflects a higher level authorization beginning at 07:00 to an EAS-17 (supervisor) for a total of 8:00 hours.

090 02 12 2012 07 00 E 17 000000 08 00 0 EST

### Detail for one full week or longer

If the employee will be on higher level for an extended amount of time (one week or longer), you will, of course, need to complete a PS Form 1723 and retain a copy locally; however, you should also send a copy to your local TACS Office for entry of a temporary job assignment (T) in Employee File Maintenance. During the dates in which the temporary job assignment is active in TACS, any rings entered for the employee in the Clock Ring Editor will automatically reflect the correct detail Finance Number, LDC/Oper and appropriate Higher Level. A valid temporary job assignment will take precedence over the employee's base job assignment. When the temporary job assignment expires, the employee's base job assignment will resume.

If the detail ends early, you must correct the PS Form 1723 and ensure appropriate corrective entries are made in TACS to prevent unnecessary payroll adjustments (higher level pay received, but not due) and hours being charged to incorrect finance numbers, pay locations, operations and LDCs. It could also necessitate manual corrections to other programs that are fed data from TACS (DOIS, MODS, FLASH, etc.).

## **ENTERING LEAVE**

eRMS is the primary application used for entering and managing all aspects of leave. TACS and eRMS share one database. Logging into one application actually logs you into both simultaneously. Using the “Switch” button in the Menu bar, located at the top of the screens in both applications, allows you to toggle back and forth between the two systems. The *Clock Ring Error Report* and the Pre-Process Button in the Clock Ring Editor specifies exactly how much leave is missing, which ensures you enter exact amounts.

**Note: You must specify the exact amount of leave when**

- **overtime and leave are used on the same day;**
- **two types of leave are used on the same day;**
- **two different reason codes are used for the same day.**

Reason codes are used to record specific types of leave. Appendix 3 has a full list of reason codes.

Please make every effort to ensure that leave is accurately reflected in both systems, but be aware that the leave and/or reason codes reflected in TACS is what will actually process and be paid to the employee. If you run into problems when entering leave into eRMS, contact your local TACS Office to request authorization to input directly into the Clock Ring Editor. They do this by activating a CRE Leave option on the employee’s active record (base or temporary) in Employee File Maintenance.

## **TRANSFERRING HOURS**

As borrowing and lending our employees between facilities is utilized now, more than ever, it is important for you to know how to ensure that their work hours are “transferred” accurately.

Having employees swipe the EBR correctly will ensure finance numbers are charged the appropriate amount of workhours and prevent manual clock ring changes by management. However, TACS Users can initiate a transfer of hours by modifying the finance number field in the Clock Ring Editor, as long as the user has access to both the base and temporary Finance Numbers involved.

You can also utilize the Loan, Transfer and Training System (LTATS) Module in TACS. LTATS allows you to manually enter a transfer of hours for current or previous pay periods and weeks to another Finance Number/Pay Location. When transferring hours in LTATS, you can only transfer actual work hours and overtime hours. Leave Hours and Penalty Overtime Hours cannot be transferred (POT is transferred as OT).

Additionally, you can only transfer whole number hours. For example, if you loaned an employee to another Finance Number for 6.12 hours, when entering the LTATS transfer, you would only be able to transfer 6 hours. Unfortunately, your unit will have to retain the .12 hours. Use typical math rounding principals - anything from .01 to .49 gets rounded down. Anything from .50 to .99 gets rounded up.

Examples –      4.45 hours → Rounds down to 4 hours  
                         4.52 hours → Rounds up to 5 hours

LTATS will only transfer work and/or OT by Finance Number, Pay Location, Finance Unit, D/A and LDC. You will need to ensure that you have the correct Finance Unit, D/A, LDC, and Pay Location of the hours in your office as well as the office to which they are being transferred.

Lastly, entries must be made one week at a time in LTATS. You cannot combine multiple weeks into one entry. Prior to making the entry, ensure you have the correct YYYY-PP-W.



# DRAFT

## TACS TRAINING

This is a snapshot of the screen you will see.

From Data				Whole Hours		To Data					Prior
D/A	LDC	P/L	Unit ID	Work	OT	Fin #	Unit ID	D/A	LDC	P/L	yyyyppw

If your finance access is only to one finance number, the finance field will auto-populate. However, if you have access to multiple finance numbers, you will need to enter the finance number in which you want to activate a loan or transfer of hours (to remain within or transfer out). Click <Enter> and the office's name and information will populate the upper portion of the window and the system will place your cursor automatically in the first row, first column where you would begin.

**Edit Week:** From Thursdays to Mondays of each week, based on the radio button you choose, LTATS entries can be made for two different "open" weeks.

The search feature (F9 or Find) is very useful when making LTATS Entries. Also, as you enter and tab across the row, the system will flag and prevent you from moving forward or saving information such as incorrect DA/LDC combinations or moving hours to an invalid LDC associated to a specific finance number. The error messages will appear as both "Hint Text" in the bottom left bar and/or Error Pop-up Windows.

Once you have successfully entered all transfers, click on the "Save" button. Entries in LTATS made for Week 1 remain open & available for modification thru Monday

## DRAFT

### TACS TRAINING

Closeout. Entries in LTATS made for Week 2 remain open & available thru scheduled Friday Week 2 Pull Time Schedule (see Appendix 4).

## COMMONLY ASKED QUESTIONS AND ANSWERS RELATING TO LTATS

**Question:** I entered a LTATS Entry transferring hours to training within my own finance number from a prior yr/pp/wk. How can I now reverse?

**Answer:** In the “From” Section, use the exact same DA/LDC as used in the original transfer. In the “To” section, use DA 888 and the same training LDC that was used in the original transfer.

Example:

Original Entry:                      From 410-4800 to 999-9400 in 2012-04-2

Reverse Entry would be:        From 410-4800 to 888-9400 in 2012-04-2

**Question:** Can I transfer city carrier street workhours (LDC 2200)?

**Answer:** LDC 2200 (street) workhours can be transferred within the same finance number for current and prior yr/pp/wk. However, if transferring to a different finance number, it has to be entered as a prior period yr/pp/wk entry.

**Question:** How and why would I need to transfer overtime hours only?

**Answer:** In the Clock Ring Editor, if an employee is working in multiple finance numbers, and an overtime authorization is made beginning at an incorrect time, the overtime will charge based on the finance/operation number the employee is on at that given time. The straight time work hours (Code 52) will transfer correctly; however, the overtime will not. In this instance, you may input a prior yr/pp/wk overtime hours only LTATS Entry moving it to the correctly finance number/da/ldc.

**Question:** When a RCA/TRC works in multiple finance numbers and over 40 hours in a week, who is charged the overtime and when is it necessary to transfer Rural Overtime hours ONLY?

**Answer:** The answer on this one is rather complicated.

## **DRAFT**

### *TACS TRAINING*

- 1- if employee is listed on a 1314A, then OT for both weeks is charged to the FN#/Route# on the 1314A.
- 2- if employee is listed on multiple 1314As, then OT for both weeks is charged to FN#/Route# of the 1314A with the LOWEST Route#.
- 3- if employee is listed on multiple 1314As with same LOWEST route#, then OT for both weeks is charged to the LOWEST FN# on these 1314As.
- 4- if employee is NOT listed on any 1314As, and employee is listed on only one 1314, then OT for both weeks is charged to that FN#/Route#.
- 5- if employee is NOT listed on any 1314As, and is listed on multiple 1314s, the OT for both weeks is charged to the FN#/Route# of the 1314 with the LOWEST FN# that the employee is listed on.
- 6- if employee is NOT listed on any 1314As, and is listed on multiple 1314s with lowest FN#, then OT for both weeks is charged to the LOWEST Route# on 1314s for that FN#.

For additional information and/or assistance relating to these types of LTATS entries or instances where workhours/overtime is being charged incorrectly, please contact your local Budget Office.

### **PPWK HOLDS (PAY PERIOD/WEEK)**

Authorized users can choose to initiate a hold to an individual using the upper portion of the module or to an entire pay location using the lower portion of the module. To access this module, click on the Time drop-down menu and then click on "PPWK Holds." Once selected, the following window will appear

Please note that although an option for Week 1 holds may appear, it is not necessary to hold employees in Week 1, as data is not extracted to mainframe prior to the final Monday closeout (reference Pull Time Schedule – Appendix 4).

### SINGLE EMPLOYEE HOLD

A hold activated for an individual employee will prevent the employee's rings from extracting to mainframe until Monday closeout or until you remove the hold, whichever comes first. (Reference Pull Time Schedule - Appendix 4)

In the Employee ID field, you can either manually enter the EIN in or use the "Find" button, Alt F or the F9 Key to search for the employee. Below the EIN, there is a "Hold Indicator" box. To initiate the hold, click in the box so that a checkmark appears. Although not required, you may enter a comment in the Hold Comments section. To save, you must click on the "Save" button or Alt S.

### ENTIRE PAY LOCATION HOLD

A hold activated for an entire finance number/pay location will prevent all employees' rings from extracting to mainframe until Saturday (Reference Pull Time Schedule - Appendix 4). To initiate a Pay Location Hold, in the bottom portion of your window enter the Finance Number and corresponding Pay Location and click on the "Hold Indicator" box so that a checkmark appears. Click the "Save" button on the right side of the screen. Reminder, if you have more than one Pay Location under a single Finance Number, you will have to repeat this process for each Pay Location.

**Individual Exercise #1**

We have learned all about the **Time** modules, which include the Clock Ring Editor, LTATS and PPWK Holds. Now it's time to test what you have learned. Take five minutes and read through the following list of 11 questions and write your answers down.

What Would You Do?

- 1) You want to view a list of all employees in a specific Pay Location that have a "Fatal Error" and be able to fix each one in the list.
  
- 2) An employee clocked to the street at 10:15 am but forgot to change their route number.
  
- 3) You have made corrections to an employee's rings and want to make sure everything is correct before hitting save?
  
- 4) An employee is scheduled for 1.5 hours of overtime on the end of their tour, which is typically 4:00 PM.
  
- 5) An employee comes to you and says "I accidentally clocked out on another employee's badge."
  
- 6) You need to transfer 12.45 work hours, of which 7.67 are overtime hours, from your Finance Number to another office.

- 7) You need to enter 8 hours of annual leave each day for Wednesday thru Friday for one employee.
  
- 8) You want to see how much leave an employee had at the beginning of the pay period while in the Clock Ring Editor.
  
- 9) You need to put PL 608, 609 and 610 on hold so the rings do not get pulled on Friday evening.
  
- 10) An employee worked as an acting supervisor for one day.
  
- 11) An employee gives you a Form 1260 because they forgot to move to the street.

**Individual Exercise # 1 - Answers**

- 1) You want to see a list of all employees in a specific pay Location that have a "Fatal Error" and be able to fix each one in the list.

**ANSWER –**

- a) In the Clock Ring Editor, click on the P/L Error button, then enter the Finance Number and Pay Location you want to correct.
  - b) Run a Clock Ring Error Report by specific finance number/pay location.
- 2) An employee clocked to the street at 10:15 am but forgot to change their route number.

**ANSWER**

- a) In the Clock Ring Editor, bring up the employee and find the ring they made at 10:15 AM. Click on the "Change" button, tab over to the route column and input the correct route.
- 3) You have made corrections to an employee's rings and want to make sure everything is correct before hitting save?

**ANSWER --**

- a) Click on the Pre-Process button in the Clock Ring Editor.
- 4) An employee is scheduled for 1.5 hours of overtime on the end of their tour, which is typically 4:00 PM.

**ANSWER –**

- a) Bring the employee up in the Clock Ring Editor and "Add" a 091 ring, Overtime Authorization, with a begin time of 16.00 and duration of 01.50 hours.

## **DRAFT**

### *TACS TRAINING*

- 5) An employee comes to you and says "I accidentally clocked out on another employee's badge."

#### **ANSWER**

- a) In the Clock Ring Editor, pull up the employee whose badge was mistakenly used. Find the incorrect End of Tour ring, 014, and click on the "Delete" button to remove the ring. Additionally, ensure the original employee made an ET. If not, have the employee complete a Form 1260 and enter the ring in the Clock Ring Editor using the "Add" button.
- 6) You need to transfer 12.45 work hours, of which 7.67 are overtime hours, from your Finance Number to another office.

#### **ANSWER**

- a) Open up the LTATS Entry Module (drop down Time then LTATS Entry) Enter your finance number and click on enter or tab to populate the fields. Enter a transfer of 12 work hours and 8 overtime hours.
- 7) You need to enter 8 hours of annual leave each day for Wednesday thru Friday for one employee.

#### **ANSWER**

- a) Enter the leave in the eRMS application by using the "Switch" function in the Menu Bar at the top of the screen or click on the "eRMS" button in the Clock Ring Editor. Use eRMS to enter any and all leave.
- b) NOTE: If unable to enter the leave in eRMS, contact your local TACS Office to request authorization to input leave into the Clock Ring Editor. Correct eRMS later.
- 8) You want to see how much leave an employee had at the beginning of the pay period while in the Clock Ring Editor.

#### **ANSWER**

- a) Pull the employee up in the Clock Ring Editor then click on the "Job Assign" button.

- 9) You need to put PL 608, 609 and 610 on hold so the rings do not get pulled on Friday evening.

**ANSWER**

- a) Go to the "Time" drop-down menu and select PPWK Holds. Complete the BOTTOM portion of the window and save three separate times to get all three Pay Locations held.

- 10) An employee worked as an acting supervisor for one day.

**ANSWER**

- a) Bring the employee up in the Clock Ring Editor and add an 090 ring, Higher Level Authorization, for an eight hour duration, effective with a begin time that corresponds exactly with the employee's BT.

- 11) An employee gives you a Form 1260 because they forgot to move to the street.

**ANSWER**

- a) In the Clock Ring Editor, bring the employee up and use the "Add" button to input the missed ring.

## **MODULE FIVE**

# **The Reports Menu Basics and the Big Four**

## **INTRODUCTION TO MODULE FIVE**

As extra strides are being taken to more closely monitor workhours at all levels of the organization, many Districts are now requiring their managers/supervisors review their employees' TACS records both at the beginning and end of their tour. Generally speaking, however, most of your work in TACS will be done at the beginning of your tour. Reviewing and correcting TACS data DAILY ensures that various work hour reports for the prior day are accurately reflected.

After you have made appropriate changes in the Clock Ring Editor, based on the errors you identified from the Clock Ring Error Report or the Pay Loc/Err Button in the Clock Ring Editor Module, the Missing Time Report, the Unauthorized Overtime Report and the Hours/Type Inquiry Report and run either the Station Summary Report or LDC/Operation Summary Report. These reports will provide you with work hour summary information, and should be used to verify that your employees' hours are recorded to the correct finance number, operation number, and LDC.

**NOTE:** Do not run Summary Work Hour Reports until you have corrected the rings for the day. Work Hour Reports will exclude employee's rings that are in Fatal Error. Remember, garbage in - garbage out.

Entering 3971s, 3189s and 1723's, etc. into the applicable application (eRMS/TACS) before you leave for the day will assist in expediting your next day's timekeeping duties. Also, you should begin correcting same day rings for employees who have already ended their tour.

In this module, we will look at and discuss these reports.

## **TACS REPORT PARAMETERS**

TACS contains an abundance of data about employees, including their master file records, clock rings, leave balances, etc. Appendix 3 lists each of the 85 reports available within TACS. This amount of data is overwhelming in its entirety and it must be filtered so that reports you generate are inclusive of only the information needed. For each report you run, you must set parameters/filters.

# DRAFT

## TACS TRAINING

The block outlined below shows parameters that can be set on most reports.

The screenshot displays a configuration interface for reports, organized into several sections:

- Finance Numbers:** Includes radio buttons for  All,  List, and  Range. The List option has three input fields with up/down arrows. The Range option has two input fields separated by a hyphen.
- Finance Units:** Includes radio buttons for  All and  List, with similar input fields for List and Range.
- Pay Locations:** Includes radio buttons for  All and  List, with similar input fields for List and Range.
- YrPPW(Online & Archive):** Includes radio buttons for  Single and  Range. The Single option has a date input field containing "2012-05-1".
- Week Period:** Includes radio buttons for  Entire Week,  Tuesday,  Saturday,  Wednesday,  Sunday,  Thursday,  Monday, and  Friday.
- Page Breaks:** Includes radio buttons for  Finance Level and  Finance/Sub-Unit.
- PFC\_Option:** Includes a checkbox  and a radio button  List with an input field.
- Error Level Selection:** Includes radio buttons for  Detailed Reporting,  Skip Warnings,  Skip Deleted Rings,  Skip Non-Scheduled BT/ET, and  Minimal Reporting.
- Summary:** Includes checkboxes for  Totals Only,  Report Totals, and  Percent/Total.

Finance Number - An assigned six-digit number that identifies an installation. You may select one of three radio buttons: All, List or Range. "All" is the default.

All allows you to run a report for ALL Finance Numbers to which you have access.

List allows you to identify multiple Finance Numbers (to which you must have access). Note: Although only three blank fields are listed, using the down arrow on your keyboard opens up additional fields, giving you the option of running more than three.

Range allows you to pull a range of Finance Numbers that are in sequence (i.e. 550000-559999). You must have access to the beginning and ending numbers; however, when run, the reports will be inclusive of only finance numbers within the range listed to which you have access.

Finance Units- not used at this time.

Pay Locations – Same as the Finance Number. You may select one of three radio buttons - All, List or Range.

YrPPW- You may select a single week, or a range of weeks.

## DRAFT

### TACS TRAINING

Week Period - Entire Week/Single Day. You may select a single day or entire week.

Page Breaks - Separates Finance Numbers with page breaks by selecting the "Finance Level" radio button or separates Finance Units/Pay Locations by selecting the "Finance/Sub-Unit" radio button.

Reports can be fine tuned and filtered using various elements available in each of the Reports Modules. The Clock Ring Error Report, for example, contains an additional parameter called "Error Level Selection."

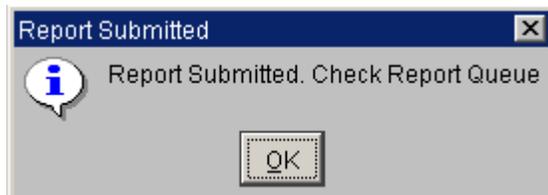


The parameters you set act as filters for the data contained in TACS, and allow you to refine your reports. As you use and familiarize yourselves with TACS, you should explore how varying parameter settings affect the reports you generate.

## THE REPORT QUEUE

The Report Queue Module contains a list of all the reports you have run in the various Report Modules in the current week. Instead of the reports displaying immediately, the user is required to view the report from the Report Queue Module. You may View, Delete and Re-Run the report from this module.

After selecting a report to run and setting the parameters (i.e., Pay Location, Finance Number, Pay Period and Week), click on the "Run" button or press <Enter>. A pop-up message will appear and state "Report Executed. Check Report Queue."



# DRAFT

## TACS TRAINING

Click on the “Reports” drop-down menu, and select Report Queue. The report you ran last will be listed at the top.

Report Name	Start Date/Time	End Date/Time	Status
LDC/Operation Summary	02/14/2012 14:16:13		Enqueued
Hours Type Inquiry	02/14/2012 13:05:55	02/14/2012 13:05:58	Complete
Clock Ring Errors	02/12/2012 17:11:49	02/12/2012 17:12:00	Complete
Clock Ring Errors	02/10/2012 17:06:52	02/10/2012 17:07:03	Complete
Employee Listing	02/10/2012 17:05:07	02/10/2012 17:05:12	Complete
Clock Ring Errors	02/10/2012 17:02:15	02/10/2012 17:02:24	Complete
LDC/Operation Summary	02/09/2012 13:21:10	02/09/2012 13:21:12	Complete
Hours Type Inquiry	02/09/2012 13:21:02	02/09/2012 13:21:04	Complete
Hours Type Inquiry	02/09/2012 13:20:57	02/09/2012 13:20:59	Complete
LDC/Operation Summary	02/09/2012 13:20:45	02/09/2012 13:20:48	Complete
LDC/Operation Summary	02/09/2012 13:20:40	02/09/2012 13:20:45	Complete
Hours Type Inquiry	02/09/2012 13:20:32	02/09/2012 13:20:34	Complete
Hours Type Inquiry	02/09/2012 13:20:27	02/09/2012 13:20:28	Complete
LDC/Operation Summary	02/09/2012 13:20:14	02/09/2012 13:20:16	Complete
Hours Type Inquiry	02/09/2012 13:20:04	02/09/2012 13:20:06	Complete
LDC/Operation Summary	02/09/2012 13:19:55	02/09/2012 13:19:57	Complete
LDC/Operation Summary	02/09/2012 13:18:10	02/09/2012 13:18:12	Complete

### BUTTON FUNCTIONS

**Refresh** – Updates the queue with the report’s latest status. Once Report Queue is open, the only way to update the status of your reports is to use the “Refresh” Button. Note: Updates to the report queue only occur about every 9-10 seconds, so clicking continuously isn’t going to update it any faster.

**Stats** – Displays a Statistics window that gives certain statistics about the report and displays any errors that may have occurred. This window can be used to see if the report is still running. Reports you generate do not contain large amounts of data and should complete almost instantaneously or within minutes at the most. If you run a report that remains in “Running” Status for longer than several minutes, most likely there is a problem. Delete from report queue and go back into the reports module and re-run.

**View** – View a Completed report.

## *DRAFT*

### *TACS TRAINING*

Delete – Deletes the report from the Report Queue Module.

Re-Run – Executes the selected report again using the same parameters that were used initially. This original report will remain & the new “re-run” report will be listed at the top, inclusive of up-to-the-minute data.

Close – Closes the Report Queue Module.

Help – On-line help information

The reports that you generate will be deleted automatically after a specified period of time. If you run the same reports daily during a week (Clock Ring Errors, Missing Time, Unauthorized OT; Hours Type Inquiry, Overtime Alert, Station Summary, initially you would run each report within the respective Reports Module by setting parameters. Thereafter, from the Report Queue, you run by highlighting the report and clicking on the “Re-Run” button. Remember, using this method will generate reports using the same parameters you selected initially.

Once a new week has opened, you must again run reports from each of the respective report modules, updating the pay period and/or week parameter.

While in the Report Queue Module, the Status column will display one of three messages.

- Enqueued – An indication that the report has been submitted. After clicking on the Refresh button the message should change to ‘Running’ or ‘Complete’.
- Running – An indication that the report is processing and will soon complete. After clicking on the Refresh button, possibly several times, this message should change to “Complete.”
- Complete – The report has finished and you may view the report by clicking on the “View” button or double-clicking on the report name row.

It does not take long for the list of reports to grow. As they take up space on a server, it is imperative that you delete reports no longer needed.

Now that you have learned the basics of setting parameters within each of the Report modules and using the Report Queue, let's run a few of the reports we previously identified as ones that you will most like run everyday.

## DAILY REPORT PULLS

Daily utilization of TACS and its reports are a necessary and unavoidable part of daily life for most Postal Service managers and supervisors. It assists us in our efforts to ensure our employees are paid accurately and timely every pay period and, with proper use, helps us avoid making costly and, in most instances, preventable payroll adjustments.

We are going to walk through four very important reports, three of which, you are **REQUIRED** to run daily. If you can keep these three reports clean and corrected on a DAILY basis, you should be able to virtually avoid payroll adjustments and emergency salary advances.

The first three reports are all located in the Clock Ring Reports Module. From the Header Drop Down Menu, select Reports, then select Clock Ring Reports.



## THE CLOCK RING ERROR REPORT

The Clock Ring Error Report is the first tab in the Clock Ring Reports Module. When opening this module, the system will automatically default to the CRE Report Tab. To run a different report, you have to remember to click on that specific tab.

The screenshot shows the 'Clock Ring Reports Module v2.007' window. The title bar includes the user ID 'TAC800R0', the date '15-Feb-2012', and 'Restricted Information'. A tabbed interface at the top shows 'Clk RngErr' as the active tab, which is circled in red. Other tabs include 'Miss Time', 'OT Alrt', 'OT/Leave', 'Raw RngErr', 'Rng Disallow', 'Self Adj', 'Tour Dev', 'Unauth OT', and 'SDO Overtime'. The main area contains several configuration sections: 'Finance Numbers' (All/List radio buttons, numeric input fields, Range checkbox), 'Finance Units' (All/List radio buttons, numeric input fields, Range checkbox), 'Pay Locations' (All/List radio buttons, numeric input fields, Range checkbox), 'YrPPW(Online & Archive)' (Single/Range radio buttons, date input '2012-05-1', Range checkbox), 'Week Period' (Entire Week, Tuesday, Saturday, Wednesday, Sunday, Thursday, Monday, Friday radio buttons), 'Page Breaks' (Finance Level, Finance/Sub-Unit radio buttons), 'PFC\_Option' (List radio button, numeric input), 'Error Level Selection' (Detailed Reporting, Skip Deleted Rings, Skip Warnings, Skip Non-Scheduled BT/ET, Minimal Reporting radio buttons), and 'Summary' (Totals Only, Report Totals, Percent/Total checkboxes). On the right side, there are buttons for 'Clear', 'Find', 'Add', 'Delete', 'Output as' (PDF, HTML, CSV radio buttons), 'Run', 'Close', and 'Help'.

Clock ring errors should be reviewed and corrected daily, at the beginning and, if time permits, at the end of your tour also, either by running the Clock Ring Error Report or using the Pay Loc/Err Button in the Clock Ring Editor (CRE) Module. Making corrections daily prevents unnecessary payroll adjustments. Many corrections require that you meet with the employee; however, if you postpone your timekeeping duties until the end of the week, questions cannot be answered because employees are not available and/or required documentation is missing. The corrections you make at that point are based on guesses, not facts.

Although a parameter within the CRE Report Module gives you the option of running for a single day, we suggest you ALWAYS run by “Entire Week”. This will ensure that all employees who have clock ring errors, regardless of the day, appear on the report.

**DRAFT**

**TACS TRAINING**

GRANT				D	A	16-8	P0	N	15.00	23.50	-SMTWT-	0.50		
Date	Time	Transaction	Amount	Message(s)		Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time	
03/12	15.01	BEGIN TOUR		Has	07.91 needs 00.09	7500-00	000000				00.00		00.00	
03/12	18.50	OUT TO LUNCH		(F)Not Full Day On Clock		7500-00	000000				00.00		00.00	
03/12	19.00	IN FROM LUNCH		(F)Not Full Day On Clock		7500-00	000000				00.00		00.00	
03/12	23.42	END OF TOUR		(F)Not Full Day On Clock		7500-00	000000				00.00		00.00	

SAUNDERS				F	S	21-0	P0	N	11.00	18.00	S-MTWTf	0.50		
Date	Time	Transaction	Amount	Message(s)		Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time	
03/13	11.00	BEGIN TOUR		(W)NonScheduled Begin Tour		5680-00	000000				00.00		00.00	
03/13	13.68	OUT TO LUNCH		(F)End Of Tour Missing		7420-00	000000				00.00		00.00	
03/13	14.18	IN FROM LUNCH		(F)End Of Tour Missing		7420-00	000000				00.00		00.00	

RATLIFF				T	L	16-9	P0	N	15.00	23.50	-SMTWT-	0.50		
Date	Time	Transaction	Amount	Message(s)		Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time	
03/12	15.00	BEGIN TOUR		Fatal Error		7450-00	000000				00.00		00.00	
03/12	19.89	OUT TO LUNCH		Fatal Error		7450-00	000000				00.00		00.00	
03/12	20.39	OUT TO LUNCH		(F)Already At Lunch		7450-00	000000				00.00		00.00	
03/12	20.39	IN FROM LUNCH		Fatal Error		7450-00	000000				00.00		00.00	
03/12	23.50	END OF TOUR		Fatal Error		7450-00	000000				00.00		00.00	

LEATHERS				J		83-4	Q0	N	08.00	16.50	SSMTWTF	0.50		
Date	Time	Transaction	Amount	Message(s)		Oper/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time	
03/13	08.02	OPERATION MOVE		(F)Activity Outside Tour		7220-02	002017				00.00		00.00	
03/13	10.20	OPERATION MOVE		(F)Activity Outside Tour		7210-02	002017				00.00		00.00	
03/13	13.75	OPERATION MOVE		(F)Activity Outside Tour		7820-02	000000				00.00		00.00	

**Individual Exercise #2**

In order to keep this report clean, it is essential you understand how to read this report and determine what is wrong with each employee. Take five minutes and answer two questions for each employee on the report above.

- a - What is the error that needs to be fixed?
- b - How do you correct the error?

- 1) D. A. Grant
  - a. What is the error?

**Answer –**

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b. How do you correct it?

**Answer –**

2) F. S. Saunders

a. What is the error?

**Answer –**

b. How do you correct it?

**Answer –**

3) T. L. Ratliff

a. What is the error?

**Answer –**

b. How do you correct it?

**Answer –**

4) J. Leathers

a. What is the error?

**Answer –**

b. How do you correct it?

**Answer -**

**Individual Exercise #2 - Answers**

1) D. A. Grant

a. What is the Error?

**Answer** - Employee does not have a full day on the clock. Employee is missing .09 in time.

b. How do you correct it?

**Answer** – enter the correct amount of leave in eRMS. If eRMS access is not available, contact TACS Office for authorization to input into CRE.

2) F. S. Saunders

a. What is the error?

**Answer** – Missing an End of Tour (ET)

b. How do you correct it?

**Answer** – Obtain a 1260 from the employee and enter the correct ET using the “Add” button in the Clock Ring Editor.

3) T. L. Ratliff

a. What is the error?

**Answer** – Two Out to Lunch Rings

b. How do you correct it?

**Answer** – Delete the incorrect out to lunch in Clock Ring Editor using the “Delete” button

4) J. Leathers

a. What is the error?

**Answer** – Activity outside tour. Three moves but no Begin Tour or End Tour.

b. How do you correct it?

**Answer** – If this employee actually did work on this day, obtain a 1260 with all missing clock rings for the day. Then add the missing rings. If the employee did not work that day, delete the rings in the Clock Ring Editor using the “Delete” button and input appropriate leave type.

## THE MISSING TIME REPORT

The Missing Time Report is the second tab in the Clock Ring Reports Module.

The screenshot shows the 'Clock Ring Reports Module' window. The title bar indicates 'TAC800R0' and '15-Feb-2012 Restricted Information'. The 'Miss Time' tab is highlighted with a red circle. The interface is divided into several sections: 'Finance Numbers' with radio buttons for 'All' and 'List' and a range input; 'Finance Units' with similar radio buttons and range input; 'Pay Locations' with radio buttons for 'All' and 'List' and a range input; 'YrPPW(Online & Archive)' with radio buttons for 'Single' and 'Range' and a date input showing '2012-05-1'; 'Week Period' with radio buttons for 'Entire Week', 'Tuesday', 'Saturday', 'Wednesday', 'Sunday', 'Thursday', 'Monday', and 'Friday'; and 'Page Breaks' with radio buttons for 'Finance Level' and 'Finance/Sub-Unit'. On the right side, there are buttons for 'Clear', 'Find', 'Add', 'Delete', and 'Output as' (with options for PDF, HTML, and CSV). At the bottom right, there are 'Run', 'Close', and 'Help' buttons.

The Missing Time Report, like the CRE Report, includes a parameter that gives you the option of running for a single day; however, we suggest you ALWAYS run by “Entire Week.” This will ensure that all employees who have clock ring errors, regardless of the day, appear on the report.

In order to gain a complete picture of your unit and ensure that ALL employees are corrected, you must also run this report DAILY and make necessary corrections. All possible errors for your unit will be visible when using both Missing Time and Clock Ring Error Reports. Only using one will leave pieces of the puzzle missing and ultimately result in an employee not being accurately paid.

Employees on this report are missing all or part of a “scheduled” day, per the Daily Schedule Tab in Employee File Maintenance. This could be as a result of one of the following scenarios:

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- A schedule change to switch off days. To correct this you would go into the Employee Maintenance Module Daily Schedules Tab and update to reflect accurate days off for correct week. PS Form 1723 or PS Form 3189 required.
  
- Daily Schedules Tab has inaccurate schedule for the day in question.
  
- Missing Leave (with no clock rings) – Errors involving full or part day of leave that has not been entered in eRMS or was entered, but did not download to TACS, will appear on this report. You will need to “Switch” over to eRMS and enter the appropriate leave or delete and re-enter so that it populates to TACS.

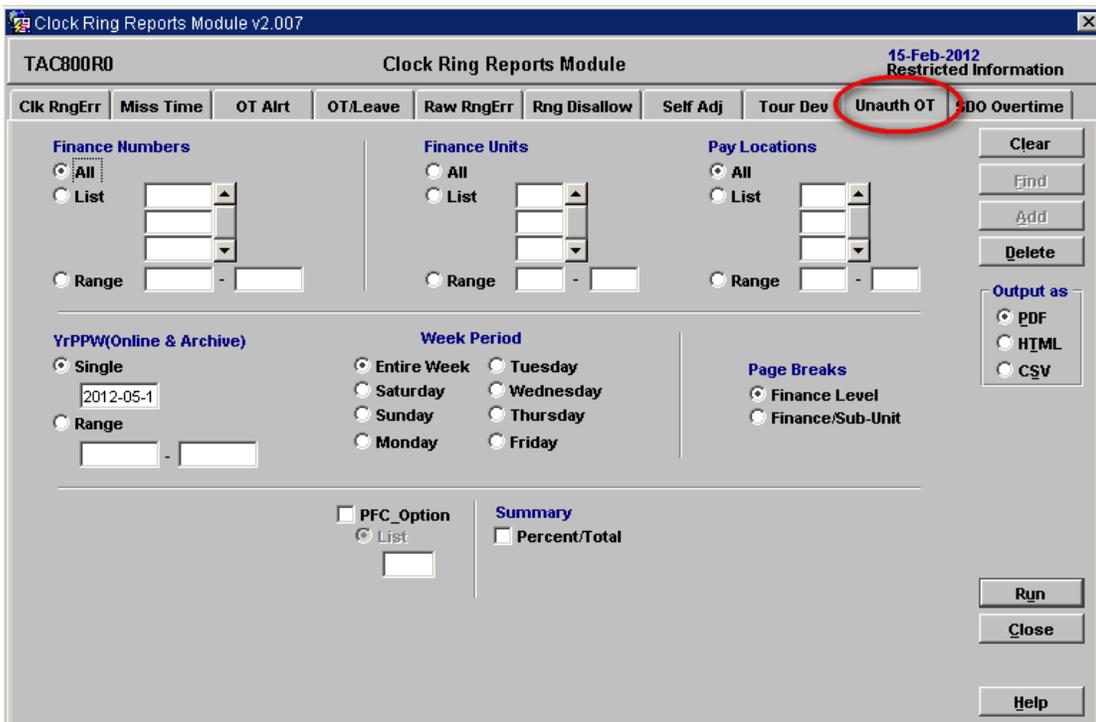
		Restricted USPS T&A Information ROANOKE P&DC Missing Time Report										User ID: CARVERDA Date: 02/15/12 Time: 01:40 PM Page: 3
Report:	TAC800R2 v2.007											
YrPPWk:	2012-05-1											
Fin. #:	51-7717											
<b>Weekly</b>												
Sub-Unit: 304												
Employee ID	Employee Last Name	F	M	Job	D/A	LDC	Oper.	Route	Sched BT	Sched ET	Schedule	Lunch
	STEVENS			Base	11-0	6700	9570-00	000000	17.00	01.50	S--TWTF	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						
	DOYLE			Base	11-0	1700	2310-03	000000	15.50	00.00	--MTWTF	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						
Sub-Unit: 309												
Employee ID	Employee Last Name	F	M	Job	D/A	LDC	Oper.	Route	Sched BT	Sched ET	Schedule	Lunch
	ADKINS			Base	11-0	1200	4630-03	000000	15.00	23.50	SSMT--F	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						
Sub-Unit: 310												
Employee ID	Employee Last Name	F	M	Job	D/A	LDC	Oper.	Route	Sched BT	Sched ET	Schedule	Lunch
	SOWERS			Base	11-0	1100	8830-03	000000	15.00	23.50	SSMTW--	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						
	BOHON			Base	11-0	1100	8830-03	000000	15.00	23.50	--SM-WTF	0.50
	NO Time Posted For Monday	--		Daily Crossfoot Amount		0.00						
	DISHON			Base	11-0	1100	8830-03	000000	15.00	23.50	SSMTW--	0.50
	NO Time Posted For Monday	--		Daily Crossfoot Amount		0.00						
	WINE			Base	11-0	1400	300-03	000000	15.00	23.50	--MTWTF	0.50
	LESS Than 8 Hrs For Tuesday	--		Daily Crossfoot Amount		4.00						
Sub-Unit: 322												
Employee ID	Employee Last Name	F	M	Job	D/A	LDC	Oper.	Route	Sched BT	Sched ET	Schedule	Lunch
	BROWN			Base	12-0	1300	4380-43	000000	13.00	21.50	--SMTWT--	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						
	BONDS			Base	12-0	1300	4380-43	000000	13.00	21.50	SSMT--F	0.50
	NO Time Posted For Tuesday	--		Daily Crossfoot Amount		0.00						

Please review the above Missing Time Report. Most errors read "NO Time Posted..." for a specific day, however, the error message on Employee Wine is "LESS than 8 Hrs for Tuesday." This message indicates that the employee has only a portion of full day leave posted. Regardless of the message, the Missing Time Report reflects errors that require leave entries to correct.

Note: Only DA's 0x-x, 1x-x, 2x-x and 3x-x should appear on this report. Disregard if an employee not entitled to 8 hours (PTFs, PSEs, etc.) shows up on this report

## THE UNAUTHORIZED OVERTIME REPORT

The Unauthorized Overtime Reports is the next to last tab in the Clock Ring Reports Module. In Web-MODS, if overtime is not addressed by adding Code 091 or has been addressed improperly (wrong begin time entered on the OT authorization), it may not be credited to the correct operation. Instances of unauthorized overtime that have not been addressed (missing or incorrect 091 transaction) may skew the Web-MODS data and undermine the validity of the reports.



Managers and supervisors are responsible for controlling overtime in their unit and these reports will be a valuable tool for you to use in that effort. When you assign a given amount of overtime to an employee, you expect the employee to work within those constraints. Creeping overtime, which occurs when employees exceed the amount of authorized overtime by a few clicks or a few minutes, is an unnecessary expense to the Postal Service. The Missing 091 Transaction Report will show you how much overtime was used by employees, by day, by Finance Number/Pay Location, and how much was authorized.

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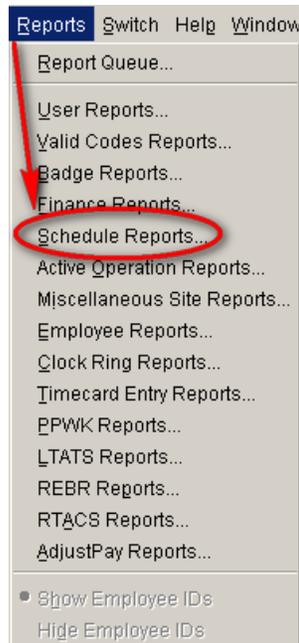
## TACS TRAINING

TACS will pay overtime for employees whether it is authorized or not; however, all instances of overtime should have a corresponding code 091 transaction . At the end of the week, the Missing 091 Transaction Report should be blank. All overtime worked without prior **supervisor approval** will appear on the Unscheduled Overtime Report and must be documented on PS Form 1017B (ELM 434.1 ; F-21, 146.253; F-401, 5.K.2).

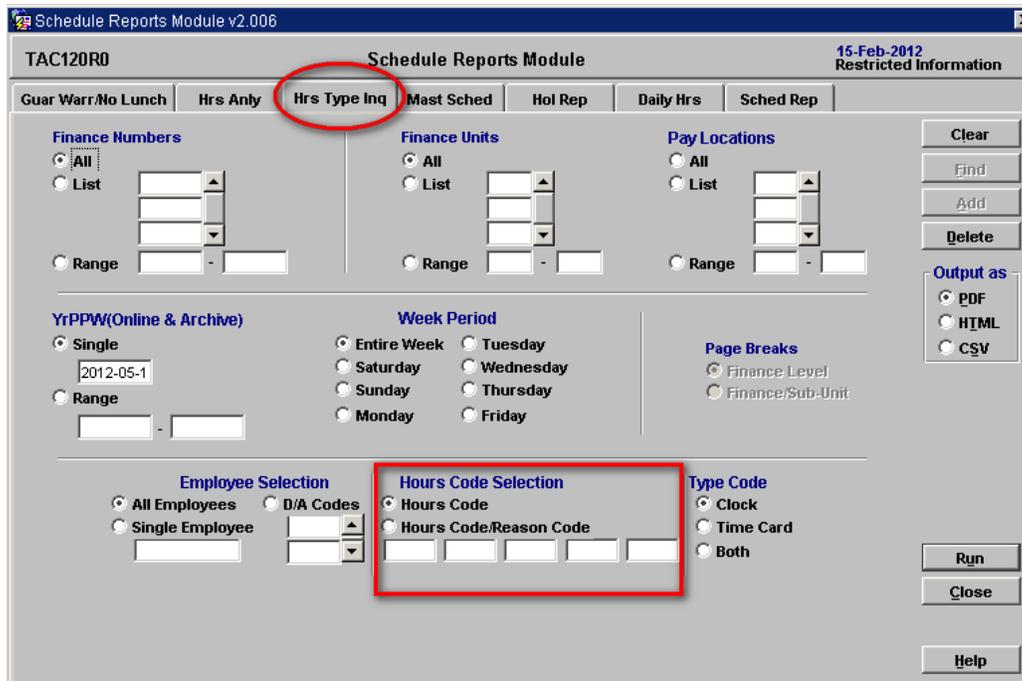
### THE HOURS/TYPE INQUIRY REPORT

The fourth report we suggest you run is the Hours/Type Inquiry Report. It is located in the Scheduled Reports Module.

From the drop-down menu select Reports, then select Schedule Reports Module.

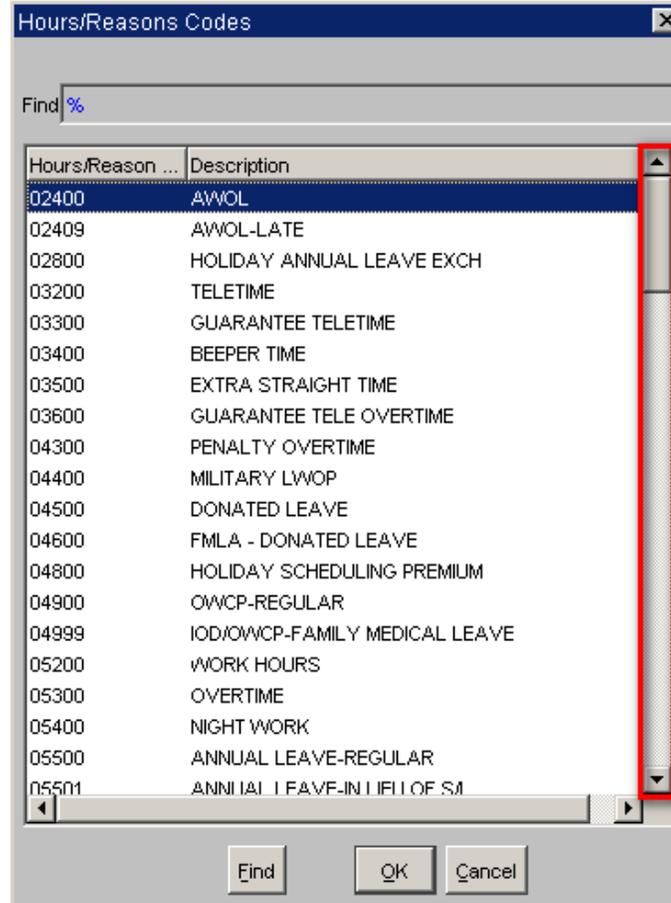


Hours Type Inquiry is the third tab in the Scheduled Reports Module.



The Hours Type Inquiry Report gives Users an option to select up to 5 different Hours/Reason Codes. After setting your basic parameters (fin #, pay loc, yr/pp/wk, employee type, etc.) you must enter at least one Hours Code or a Hours Code/Reason Code combination before the system will allow you to run. The Hours/Type Inquiry Report provides you with the total number of hours incurred by a particular type of leave or overtime within a Finance Number, Pay Location, etc.

To view a list of valid Hours Codes/Reason Codes, click on list by clicking on the corresponding Radio Button and place your cursor in the first blank field, and click on "Find," Alt S, or by clicking on the F9 key located at top of your keyboard. The following pop-up window will appear.



Using the up and down arrows on the bar on the far right, you can view and select the applicable hours codes/reason codes. Note that these are 5-digit numbers. The hours codes that end with “00” are those with no reason codes applied. Primarily, for leave usage, Reason Codes provide a finer breakdown than was previously available. Appendix 3 contains listings of the Hours Codes and the Hours Codes/Reason Codes.



**Individual Exercise #3 – Answers**

1) You want to see for multiple days what employees are missing time?

**ANSWER** – In the Clock Ring Report Module, run a Missing Time Report for the entire week.

2) You want a list, for your Finance Number, of how much POT, Guaranteed Time and LWOP you've used for this week.

**ANSWER** – In the Scheduled Reports Module run an Hours/Type Inquiry Report for Hours Codes 043 (POT), 062 (Guarantee Time) and 060 (LWOP).

3) You want to see, for multiple pay locations, what employees have unauthorized overtime.

**ANSWER** – In the Clock Ring Reports Module, run an Unauthorized Overtime Report, specifying the Pay Locations you want to see.

4) You want to see, for multiple Finance Numbers, what employee's are in "Fatal Error".

**ANSWER** – In the Clock Ring Reports Module, run a Clock Ring Error Report. Select the "List" radio button and enter each specific Finance Number.

## **MODULE SIX**

# **The Reports Menu All the Rest**

## TACS Reports

There are a total of 85 different reports TACS. Reports are grouped into specific Modules, as listed below.

**Active Operations Reports (3)**: This module contains three reports allowing users access to information regarding active Operation Numbers and Local Units (LUs).

- **Active Operations Report** is a listing of operations and local units that have been "turned on" or activated for a particular Finance Number.
- **National Authorized Operations Report** provides a listing of nationally authorized operations for each office category type.
- **Operation Errors** provides a list of employees assigned to base operations that have been deactivated. This report should be run by the TACS office when changes to operation numbers are announced.

**AdjustPay Reports (5)**: This module contains five reports allowing authorized users (normally the TACS Office) access to information regarding adjustments that have been entered and/or processed in AdjustPay. The reports provide information on the employee(s) adjusted and individual(s) authorizing/entering the adjustments.

**Badge Reports (3)**: This module contains three reports allowing authorized users (normally the TACS Office) access to information regarding Badge Assignments, Unassigned Badges and Badge Type Listings.

**Clock Ring Reports (10)**: This module contains ten reports allowing users access to information regarding clock rings.

- **Clock Ring Error Report** displays errors on a clock ring or set of clock rings that cannot be processed for an employee. The report will also show employee records with no time posted for a scheduled day or that does not cross foot on any day.

- **Missing Time Report** shows employee records with no time/leave posted for a scheduled day or does not cross foot on any day.
- **Overtime Alert Report** lists employees in an overtime status or approaching overtime for the week.
- **Overtime and Leave Report** lists employees with both overtime and leave on the same day.
- **Raw Ring Errors Report** shows raw ring errors.
- **Ring Disallowance Report** lists employees whose clock rings have been changed by a supervisor, or in effect, "disallowed."
- **Self-Adjustment Report** lists all the users who made any type of change to their own clock rings. Note: City carriers that make After-The-Fact moves on the EBR upon return to office will appear on this report.
- **Tour Deviations Report** is designed to allow the user the ability to select employees who deviate from their assigned schedule and/or lunch amounts.
- **Unauthorized Overtime Report** contains two reports.
  - Missing 091 Transaction Report lists employees with instances of overtime without a corresponding 091 transaction.
  - Unscheduled Overtime Report lists employees who have worked overtime recorded as 'unscheduled' via 091 transaction – which is overtime worked without prior approval from supervisor. These instances must be recorded on PS Form 1017-B, Unauthorized Overtime Record
- **Scheduled Day Off Overtime Report** lists employees with overtime on a scheduled day off.

**Employee Reports (11):** This module contains eleven reports allowing users access to information regarding individuals or groups of individuals at a specific location.

- **Authorized Higher Level Report** lists employees with authorized Higher Level on a daily basis via a 090 transaction in the CRE.
- **Automatic Higher Level Report** lists employees who have the Automatic H/L indicator checked and have worked an operation number that entitles them to automatic higher level.
- **Employee All Report** lists almost every thing in the TACS database for a particular employee for a particular year, pay period and week.

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- **Employee File Comparison Report** lists TACS employees found with differences between what is in the employee master file on the mainframe (DDE) and the TACS application.
- **Employee Listing Report** lists the employees within a finance number, pay location or multiple locations.
- **Employee Moves Report** displays the Operations, LU's and/or LDC's that an employee or group of employees has worked during the week. Also provides the total workhours, overtime and penalty overtime for each operation.
- **Employees on the Clock Report** will display all employees on the clock at a designated date and time.
- **Higher Level Details Report** will generate a report listing employees with a Temporary Job Assignment.
- **LTD Duty/REHAB Report** displays total hours to date on each operation for each employee on limited duty or rehabilitation. These are employees on Operation 959, or whose base Labor Distribution Code is 6900.
- **Carrier Moves Report** displays moves for letter carriers only.
- **HR to TACS Report** shows any employee for which the HRSSC has entered a transaction.

**Finance Reports (7):** This module contains seven reports allowing users access to information regarding the finances for their unit.

- **Hours and Dollars Report** displays the hours worked and an approximation of the cost, in dollars, for the selected criteria: Pay Location, Finance Unit, Finance Number, weekly or range of weeks.
- **LDC/Operation Summary Report** totals work hours, overtime hours and sick leave hours by LDC, Operation or Operation/Local Unit code. These reports are based on operation hours attributed to the Finance Number you have selected.
- **Station Summary Report** lists work, overtime and sick leave hours by LDC for carrier stations.

**Note:** When run by pay locations, the work hours in this report are inclusive of only those employees assigned to the finance number (BaseJA or TempJA). When run by local units (lu), the work hours in this reports are inclusive of all hours charged to the finance number selected regardless of the employee's assignment.

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- **Finance Description Report** will display information on Finance Number(s) selected, including ROG codes, CAG and office type.
- **Flash Reference Report** provides line item data totaling hours by LDC within function.
- **Finance Unit Descriptions Report** provides descriptions of Finance Units and Pay Locations.
- **Non-Mail Handler Casual Report** provides, for the Mail Handler's Union, a report of non-mail handler employees who worked in specified mail handler operations.

**LTATS Reports (4):** Listed below is an explanation of the four reports available in this module.

- **LTATS - Loaned Employee Report** displays employees 'loaned to' another office. Report displays: work hours, overtime, and Penalty Overtime.
- **LTATS - Missing CAG A to G Report displays missing LTATS (1236s)** for small timecard offices.
- **LTATS - Summary Report** displays work and overtime hours that have been transferred to a different LDC/DA or loaned to another office.
- **LTATS Estimated Transactions Report** displays detail information on transactions transferring work hours.

**Miscellaneous Site Report (1)** provides site descriptions and Finance and IT contacts for that site.

**PPWk Reports (8):** This module contains eight reports allowing users access to view and print various pay period reports from both timecard and timeclock offices.

- **Non-Crossfoot Errors Report** lists employees whose time is not in crossfoot for the week. The report is designed to be a tool recommended for use when you are ready to release T&A data at the end of the week.
- **Pay Week Status Report** provides information regarding time transmitted to Eagan Mainframe.
- **Weekly Form 1261 Report** provides automatic clock rings generated for employees who have the 1261 indicator checked in Employee File Maintenance.

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- **Weekly Total Hours Report** provides the total amount of hours for each hours code and reason type recorded for the week.
- **Pay Period Report** provides the status of aggregate pay period clock ring data.
- **Pay Week Status Detail Report** provides pay period status for individual employees: on hold, ready to upload or closed.
- **Time Certification Report** provides the final certifications for a given pay period.
- **Time Certification Differences Report** provides any differences in time certifications by pay period.

**REBR Reports (7):** This module contains seven reports allowing users access to information regarding rural routes that record time via an EBR.

NOTE: This module will soon be obsolete as offices using rural EBR are being converted back to rural timecard entry.

**RTACS Reports (10):** This module contains ten reports allowing users access to information regarding rural routes that record time manually (1314 and 1314A Entry Modules).

**Schedule Reports (7):** This module contains seven reports allowing users access to information regarding employees' schedules and hours utilization.

- **Guarantee Waivers/No Lunch Report** displays authorizations for Guaranteed Time Waivers (Transaction Code 092), and No Lunch Waivers (Transaction Code 093).
- **Hours Analysis Report** displays work, overtime, sick leave and annual leave hours for each employee.
- **Hours Type Inquiry Report** lists employees with specific hours type and/or hours reason codes.
- **Master Schedule Report** identifies predefined schedules (Schedules 1-22; 700-714) as well as any additional locally added schedules.
- **Holiday Report** is designed to list employees who are due holiday leave during the current week, but the system will not generate the leave or holiday work because the employee is an hourly rate regular (DA 3XX) or the

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employee is a rehab employee (LDC 6900). This report is only available during weeks that contain a holiday.

- **Daily Hours Report** lists employees in Finance Number, Pay Location and Employee Identification Number order. The first line for each employee is the indicative data (Employee Id, Name, RSC, LDC, etc.). The next line will be the base hours the employee has worked in his/her base job. Subsequent lines will reflect any hours worked in higher level positions.
- **Schedule Report** lists employees that are in selected schedule(s).

**Timecard Entry Reports (3)**: This module contains three reports that allow users access to information regarding timecard weekly payroll information for manual timecard offices.

**User Reports (5)**: This module contains five reports providing information regarding TACS Users access and log-on history.

- **The User Access Report** provides a list of users who have access to the TACS application
- **The User Log Report** provides a list of users who have logged into and out of TACS.
- **Template Report** provides a listing, by template, of all employees under that template.
- **User Not Logged Report** provides a listing of users that have not logged into the TACS application within a selected Date/Time range.
- **User Last Login Report** provides a list of the last date and time users logged into the TACS application.

**Valid Codes Report (1)**: provides listing all of the valid codes or a selected Valid Code from the Valid Codes table.

Instead of going through each report, one by one, we are going to break them into groups and learn about these reports using varying exercises.

## **REPORTS EXERCISE**

For this exercise, we are going to separate into four groups. Each group will be responsible for all the reports in a given module. Most of your time will be spent in the Clock Ring Reports, Employee Reports, Finance Reports and Schedule Reports Modules so these are the modules that will be assigned. When you get into your groups, discuss the value of each report within your given module and identify which reports are, or will be, the most helpful in your workplace and why.

You will need to utilize Appendix 2 as it provides you a brief summary of what information is available from each report. Additionally, in the collateral materials you were provided, there is a packet of Sample Reports that you can use as a reference guide to review what each report contains.

We will take 15-20 minutes in your groups so you can discuss and understand your set of reports. Each group will need to select a "spokesperson." When we get back together, each group will present to the class their set of reports, from the Report Module assigned, and we will discuss to ensure everyone has a good understanding of each.

**GROUP 1 - CLOCK RING REPORTS MODULE**

OT/Leave  
Overtime Alert  
Raw Ring Errors  
Ring Disallowances  
Self Adjustment  
Tour Deviations

**GROUP 2 - EMPLOYEE REPORTS MODULE**

Auth H/L  
Auto H/L  
Employee All  
Employee Comp  
Employee List  
Employee Move  
Employee on the Clock

**GROUP 3 - FINANCE REPORTS MODULE**

Hours and Dollars  
LDC/OPER Summary  
Station Summary  
Finance Description

**PP/WK REPORTS MODULE**

PP Report  
PPWeek Status Detail

**GROUP 4 - SCHEDULE REPORTS MODULE**

Guarantee Waives/No Lunch  
Hours Analysis  
Master Schedule  
Holiday Report (Rehab/PTR Holidays)  
Daily Hours  
Schedule Report

You have rip charts and markers available for use.

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*TACS TRAINING*

**CLOCK RING REPORTS – NOTES AND DISCUSSION**

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*TACS TRAINING*

**EMPLOYEE REPORTS MODULE – NOTES AND DISCUSSION**

*DRAFT*

*TACS TRAINING*

**FINANCE/PPWK REPORTS MODULE – NOTES AND DISCUSSION**

*DRAFT*

*TACS TRAINING*

**SCHEDULED REPORTS MODULE – NOTES AND DISCUSSION**

**Individual Exercise #4**

We have just reviewed a majority of the reports available for you to run in TACS. Below is a list of 12 reports. Take 5-10 minutes and write down the steps you would take to correctly pull each report. For this activity, assume we are in **Pay Period 7, week 1 of 2012.**

- 1) A report showing what employees were on the clock at 8:15am on Tuesday.
  
- 2) A report showing all users that made any type of change in their own clock rings.
  
- 3) A report showing any authorizations made for guaranteed time.
  
- 4) A report showing all employees who had badge swipes removed due to non-work.
  
- 5) A report showing all employees within a specific office.
  
- 6) A report showing what employees moved to Operation 722 on Thursday.
  
- 7) A report showing the cost in dollars of the hours worked.

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- 8) A report showing the employees in overtime status for the week.
  
- 9) A report showing the total work hours, overtime hours and sick leave hours broken down by LDC and Operation Number for Monday.
  
- 10) A report showing all employees that were authorized higher level during the week.
  
- 11) A report showing employees that have both overtime and leave on the same day.
  
- 12) A report showing almost everything in the TACS database for employee number 34567890 for Friday.

**Individual Exercise #4 - Answers**

- 1) A report showing what employees were on the clock at 8:15am on Tuesday.

**ANSWER** – In the Employee Reports Module, run an Employee on the Clock Report. In the Date/Time Selection, enter the appropriate date and for time, enter 08.25. Click on “Run”

- 2) A report showing all users that made any type of change in their own clock rings.

**ANSWER** – In the Clock Ring Reports Module, pull a Self Adjustment Report.

- 3) A report showing any authorizations made for guaranteed time.

**ANSWER** – In the Schedule Reports Module, pull a Hours Type Inquiry Report for code 062.

- 4) A report showing all employees who had badge swipes removed due to non-work.

**ANSWER** – In the Clock Ring Reports Module, pull a Ring Disallowance Report.

- 5) A report showing all employees in the office.

**ANSWER** – In the Employee Reports Module, pull an Employee List Report.

- 6) A report showing what employees moved to Operation 722 on Thursday.

**ANSWER** – In the Employee Reports Module, pull an Employee Move Report. Under Week Period, click the radio button next to Thursday. Under Report By, click the radio button by List and then enter 7220 in the first box.

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### *TACS TRAINING*

- 7) A report showing the cost in dollars of the hours worked.

**ANSWER** – In the Finance Reports Module, pull an Hours and Dollars Report.

- 8) A report showing the employees in overtime status for the week.

**ANSWER** – In the Clock Ring Reports Module, pull an Overtime Alert Report.

- 9) A report showing the total work hours, overtime hours and sick leave hours broken down by LDC and Operation Number for Monday.

**ANSWER** – In the Finance Reports Module, pull an LDC/Operation Summary Report. Under Week Period, click the radio button next to Monday. Under Summarize By, click the radio button by LDC/Oper.

- 10) A report showing all employees that were authorized higher level via 090 transaction during the week.

**ANSWER** – In the Employee Reports Module, pull an Authorized Higher Level Report.

- 11) A report showing employees that have both overtime and leave on the same day.

**ANSWER** – In the Clock Ring Reports Module, pull an Overtime/Leave Report.

- 12) A report showing almost everything in the TACS database for employee number 34567890 for Friday.

**ANSWER** – In the Employee Reports Module, pull an Employee All Report. Under Week Period, click the radio button by Friday. Under Selection, click the radio button next to Single Employee and enter the employee ID 34567890.

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*TACS TRAINING*

## **MODULE SEVEN**

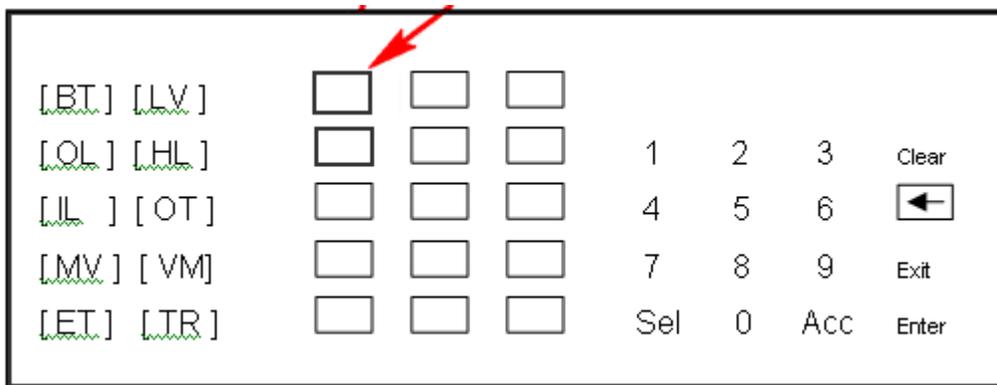
# **TACS AND THE ELECTRONIC BADGE READER**

## INTRODUCTION TO MODULE SEVEN

The upper left button on the Operations portion of the EBR is referred to as the Base operation. An employee instructed to punch to his/her base operation, presses the BT button and swipes their badge. Unless a user chooses to override, the base operation button will activate automatically. If an employee is instructed to clock onto a different operation, after selecting the appropriate action (BT, MV, IL), and the appropriate operation button, they swipe their badge.

### FUNCTION KEYS

### BASE OPERATION



The function keys located on the left two columns of the EBR and the Base Operation Key are pre-programmed and cannot be changed or deactivated. Use of these buttons is explained in the succeeding pages.

## **STAND UP TALK FOR ALL EBR USERS**

All employees in this office are required to use the Electronic Badge Reader (EBR) to accurately record their time on a daily basis. Every employee has their own unique badge that, when swiped, will allow you to record your daily Begin Tour, Out to Lunch, In from Lunch, Operational Moves and End Tour. Badges are not to be kept on your person, nor leave a facility without prior approval. They should be retrieved from a badge rack and, once used, re-racked.

As long as the base operation button is not overridden, each employee's hours will be charged to his/her base operation. You can, of course, clock into a different operation than your base by selecting that operation number.

When you hear a "pleasant" beep, your badge swipe was accepted. If it doesn't accept the badge, it makes a "not-so-pleasant" squawk.

The Vehicle (Veh) pre-programmed function key, next to last button in bottom of 2<sup>nd</sup> column is no longer in use.

The Transfer (TR) function key is used only when your time needs to be charged to a different Finance Number. For example, you begin work in a Mail Processing base finance/operation number and are instructed to move to a Customer Service Finance and operation number. You would swipe MV (move) then the TR (transfer) function key and follow the prompts on EBR Display.

Remember, you are your own best timekeeper. Using your badge to accurately record all clock rings will ensure you are paid accurately.

## LETTER CARRIER NOTE

City Carriers use the move transaction to change route numbers when serving various routes on the same day. The carrier presses MV (MOVE), selects a pre-programmed operation number, or enters one manually using the numeric keypad, then swipes their badge.. The operation number can be 3-digit or 5-digit OPR-LU code (if LU's are utilized in that unit). If the carrier is using the numeric keypad to key in the operation number and is required to enter the LU, the carrier must press the SEL key, prior to entering the LU. The Route Number will be the number (6 digits) to which the carrier is moving.

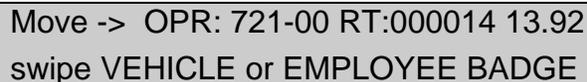
The MOVE ring is also used when the carrier leaves the office to a street operation, and when the carrier returns to the office from the street. It can also be used to enter route changes that occur while carrier is on the street (due to pivots, bumps, assistance, etc. to other routes). Upon return to the office, the employee will create After-The Fact MOVES at the EBR, manually entering operation number and local unit (if used), route number and time. Entries made are supported by PS Form 3996 completed by the employee and provided to management for retention. These entries are reflected in the Employee All Report and in the Self Adjustment Reports.

Once the route number has been entered, the EBR screen will display:



```
Move -> OPR: 721-00 RT:00014
enter TIME or swipe VEH/EMP BADGE
```

The employee will then enter the time that he/she moved to that route and/or operation. For example, if the employee enters 1392 (hours and hundredths), the EBR screen will display:



```
Move -> OPR: 721-00 RT:000014 13.92
swipe VEHICLE or EMPLOYEE BADGE
```

## **AUTHORIZING CLOCK RINGS**

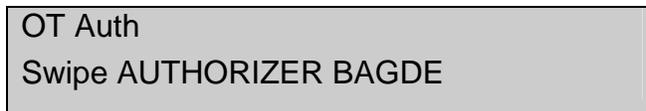
You may use your Authorizing Badge to make entries at the EBR for your subordinate employees (missed rings, overtime, higher level and leave). Each clock is programmed with a password that you will be prompted to input after choosing the appropriate function key and swiping your authorizing badge. An authorization made at the EBR is made in the same method as when using your computer. Each authorization must be input for each day separately. When the EBR prompts you for the employee badge, you will need to swipe the employees' badge.

## **OVERTIME**

Supervisors who are issued authorizing badges may input overtime authorizations at the EBR for their subordinate employees. A password is needed for this type of authorization. A future enhancement will include a step where you will be required to identify instances of overtime as scheduled or non-scheduled (Y=Yes or N=No). The default will be set to Y (Yes). The following is an example of how to authorize 2 hours OT beginning at 1500 on March 21.

The first step to authorizing overtime is pressing the OT Function key located on the left side of the EBR keyboard.

When OT is selected, the EBR displays the following screen:



OT Auth  
Swipe AUTHORIZER BAGDE

When the supervisor swipes his or her badge through the EBR, the screen prompts:



OT Auth  
Enter PASSWORD

When the four-digit password has been entered correctly, the screen prompts:

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## TACS TRAINING

OT  
enter EMPLOYEE # from pad or swipe BADGE

When the employee's badge has been swiped through the EBR, the screen will display the employee's EIN as follows:

OT 12345678  
enter OT HOURS Authorized

After the number of hours of overtime (0200) is entered from the numeric keypad in Hours and hundredths, the screen display prompts:

OT 12345678 02:00  
Month:

Enter the calendar month in two digits (03) from the numeric keypad, the screen display prompts:

OT 12345678 02:00 03  
Day:

Enter the calendar day (21) the overtime is scheduled to begin, not necessarily the time and attendance day. After the day is entered from the numeric keypad, the display prompts:

OT 12345678 02:00 03/21  
enter START TIME (HH.hh):

After start time (1500) is entered from the numeric keypad, the screen display prompts:

OT 12345678 02.00 03/21 15.00  
enter Acc to accept – Clear to reject

If data is correct, press the "ACC" key to process the transaction. The Overtime Transaction data you entered (2.00 hours for date 3/21 beginning at 1500) will

# *DRAFT*

## *TACS TRAINING*

remain displayed on the screen, allowing you to authorize additional employees using the same settings. To continue to authorize overtime for subsequent employees, you swipe their employee badge and press the "ACC" key. Continue this process until all employees have been entered.

If data for the next employee or group of employees is different, press the "CLEAR" key, enter the new information and start again. You must press the "CLEAR" key after the last transaction has been completed. If you do not enter a transaction within a short period of time, the system will automatically log you out of the authorizing function and the screen will clear.. To manually exit, press "Clear."

A future enhancement will be implemented soon to allow users to identify instances of overtime as either scheduled or non-scheduled - "Y" for Yes or "N" for No. With this enhancement, all instances of overtime must be addressed to include in the 091 (overtime authorization) whether scheduled (Y) or unscheduled (N).

### **Overtime Authorization Input Overview**

1. Press the "OT" key
2. Swipe Authorizer Badge
3. Enter Password
4. Swipe Employee Badge or enter EIN
5. Enter Number of Overtime Hours Authorized (4 digits - Hours and hundredths)
6. Enter Month (2 digits)
7. Enter Calendar Day Overtime is to Begin (2 digits)
8. Enter Time Overtime is to start (4 digits - Hour and Hundredths)
9. Press the "ACC" key to complete the transaction (or CLEAR/EXIT to start over)
10. If authorizing a group of employees for the same date, amount and start time, swipe the next employee badge then press the "ACC" key. Continue this process until all employees have been authorized.

11. Press the 'CLEAR" or "EXIT" key after the LAST transaction has been completed

## **AUTHORIZING LEAVE**

eRMS is the primary application used for entering and managing all aspects of leave. Entering leave into TACS via authorizations in the EBR should only occur in emergency situations.

Supervisors who are issued authorizing badges may input leave authorizations via the EBR for their subordinate employees. The password is needed for this type of authorization.

The following is an example of how to input an authorization for 8 hours of sick leave (hours code 056) beginning at 0700 on March 21:

The first step to authorizing a leave entry is pressing the LV Function key located on the left side of the EBR keyboard.

When LV is selected, the EBR displays the following screen:



Leave  
swipe AUTHORIZER BADGE

When the supervisor swipes his or her badge through the EBR, the screen prompts:



Leave  
enter PASSWORD:

When the four digit password has been entered correctly, the screen prompts:



LV  
enter EMPLOYEE # from pad or swipe BADGE

## DRAFT

### TACS TRAINING

When the employee's badge has been swiped through the EBR the screen will display the EIN as follows:

```
LV 12345678
enter LEAVE CODE from numeric key pad
```

When the 2-digit leave code (56) has been entered from the numeric keypad, the screen displays:

```
LV 12345678 [56]
enter LEAVE HRS Authorized (HH.hh):
```

After the total number of leave hours are entered from the numeric keypad in hours and hundredths, the screen display prompts:

```
LV 12345678 [56] 08.00
Month:
```

After the calendar month (03) is entered from the numeric keypad, the screen display prompts:

```
LV 12345678 [56] 08.00 03
Day:
```

Enter the actual calendar day (21) the leave is scheduled to begin (not necessarily the service day). After the day has been entered from the numeric keypad, the screen display prompts:

After start time for Leave (Hours and hundredths) is entered (0700) from the numeric keypad, the screen display prompts:

```
LV 12345678 [56] 08.00 03/21 07.00 S
ACC >Accept ENTER>Reason SEL>Unsched/Sched
```

## **DRAFT**

### *TACS TRAINING*

If the reason code for the leave entered is "00," just press ACC(ept). If the reason code for the leave entered is other than "00," press the ENTER button and input the 2-digit reason code. You may change the "S" (scheduled) to "U" (unscheduled) prior to ACC(ept) by pressing the SEL(ect) button.

**NOTE:** A list of applicable Reason Codes may be found in Appendix 3.

If data is incorrect, press the CLEAR or EXIT key and start again.

After the "ACC" key is pressed to process the transaction, the screen will remain locked in for the next identical LEAVE transaction. If you do not enter a transaction within a short period of time, the system will automatically log you out of the authorizing function and the screen will clear. To manually exit, press "Clear."

Note: All leave transactions must be supported by PS Form 3971.

### **NO LUNCH**

When a NO LUNCH request is submitted and approved (via PS Form 3971 or 3189) the authorization can be entered at the EBR. Follow the instructions for LEAVE and use Code 93 (No Lunch Punch Authorization).

### **Leave Authorization Input Overview**

1. Press the "LV" key
2. Swipe Authorizer Badge
3. Enter Password
4. Swipe Employee Badge or enter the EIN
5. Enter Leave Code
6. Enter Number of Hours Authorized (4 digits - Hours and hundredths)
7. Enter Month (2 digits)
8. Enter Calendar Day Leave is to Begin (2 digits)
9. Enter Time Leave is to Start (4 digits - Hours and hundredths)

10. Enter Reason Code and select Scheduled or Unscheduled.
11. Press the "ACC" key to complete the transaction (or CLEAR/EXIT to start over)
12. Press the "CLEAR" or "EXIT" key after the LAST transaction has been completed

### **AUTHORIZING MISSING CLOCK RINGS**

When an employee is missing a basic clock ring(s), the employee is in a (F) Fatal Error status and will be listed on the Clock Ring Error Report. If you are inputting the clock rings, a Form 1260 or 1261 must be completed by the employee as documentation and authorization for input of the missing ring. Not all "missing ring" conditions cause an error report. For example, a carrier moves to another route while on the street, but fails to input upon return to the office. Such rings will not cause the employee to be in fatal error, but should be input as soon as the data is available to the supervisor.

A supervisor can enter the missing clock ring(s) at the EBR using the "Add" Button on the Transaction Editor or add the missing ring to the employee's record in the TACS Clock Ring Editor Module using PS Forms 1260, 1261 or 3996 as supporting documentation..

The Missing Ring Mode allows supervisors to enter missing clock rings at the EBR. The following is an example of how to input a missing Begin Tour for an employee on March 22 at 0850 in Operation 130.

The first step for entering the missing clock ring at the EBR is to press the 'Clear' key to clear the screen. The supervisor swipes his or her Authorizer badge through the EBR. Then the screen prompts:



---- USPS Tue Mar 2001  
enter PASSWORD

When the four digit password has been entered correctly, the screen prompts:

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## TACS TRAINING

Add Missing Ring	(3) Volume Data
Delete Bad Ring	Select

When (1) Add Missing Ring is selected the screen prompts:

Add Missing Ring For 00/00 0000
Month --

When the two code digit for the Month (03) has been entered correctly, the screen prompts:

Add Missing Ring For 03/00 0000
Day:

Enter the calendar day (22) that the missing clock rings is for. Remember, midnight (0000) starts the new calendar day. After the day has been entered, the screen prompts:

Add Missing Ring For 03/22 0000
Hour:

Enter the actual time in hours and hundredths (0850) for the missing clock ring from the numeric keypad. After the time for the missing clock ring has been entered, the screen prompts:

Add Missing Ring For 03/22 0850
enter FUNCTION

Press the appropriate Function key for the missing clock ring. Remember to enter the Operation Number when selecting "BT", "IL" and "MV" functions. Operation Numbers are not used when selecting "OL" and "ET" functions.

After the function has been selected (BT), the screen prompts:

## *DRAFT*

### TACS TRAINING

Begin Tour Oper:000-LU  
enter OPR or SEL LU or swipe BADGE:

After the Operation Number (130) has been entered, the screen prompts:

Begin Tour Oper:130  
enter Local Unit or swipe BADGE

If local units (LU's) are used, enter at this time. Otherwise, swipe the employee's badge. The screen will remain locked in for the next MISSING CLOCK RING transaction. If you do not enter a transaction within a short period of time, the system will automatically log you out of the authorizing function and the screen will clear. To manually exit, press "Clear."

### **Missing Clock Ring Authorization Input Overview:**

1. Press the "CLEAR" key, then Swipe Authorizer Badge
2. Enter Password
3. Select (1) Missing Clock Ring
4. Enter Month (2 digits) of Missing Clock Ring
5. Enter Day for the Missing Clock Ring (2 digits)
6. Enter Time for the Missing Clock Ring (4 digits - Hour and hundredths)
7. Press the appropriate Function Key for the Missing Clock Ring (BT, OL, EL, MV or ET)
8. Enter the appropriate Operation Number if Missing Clock Ring is for a BT, IL or MV
9. Swipe Employee Badge or enter EIN
10. Press the "CLEAR" key after the LAST transaction has been completed



## DRAFT

### TACS TRAINING

```
Delete Bad Ring For 00/00 0000  
Month --
```

When the two digit code for the Month (03) has been entered correctly, the screen prompts:

```
Delete Bad Ring For 03/00 0000  
Day:
```

Enter the calendar day (22) of the bad clock ring. (Remember, midnight 0000} starts the new calendar day). After the day has been entered, the screen prompts:

```
Delete Bad Ring For 03/22 0000  
Hour:
```

Enter the actual time in Hours and hundredths (0850) for the bad clock ring from the numeric keypad. After the time for the bad clock ring has been entered, the screen prompts:

```
Delete Bad Ring For 03/22 0850  
enter FUNCTION
```

Press the appropriate Function key for the bad clock ring. Remember to enter the Operation Number when selecting "BT", "OL" and "MV" functions. Operation Numbers are not used when selecting "OL" and "ET" functions. After the function has been selected (BT), the screen prompts:

```
Begin Tour Oper:000-LU  
enter OPR or SEL LU or swipe BADGE:
```

The EBR will only accept a 5-digit number. DO NOT enter the trailing zero for the Operation Number. Instead of entering 1300-00, enter 130-00. After the Operation Number (130) has been entered, the screen prompts:

Begin Tour Oper:130  
Enter Local Unit or swipe BADGE

Swipe the employee's badge to complete the transaction. The screen will return to the menu screen to select your next entry. If you do not enter a transaction within a short period of time, the system will automatically log you out of the authorizing function and the screen will clear. To manually exit, press "Clear."

### **Delete Bad Clock Ring Authorization Input Overview**

- 1) Press the "CLEAR" key, then Swipe Authorizer Badge
- 2) Enter Password
- 3) Select (2) Delete Bad Clock Ring
- 4) Enter Month (2 digits) of Bad Clock Ring
- 5) Enter Day for the Bad Clock Ring (2 digits)
- 6) Enter Time for the Bad Clock Ring (4 digits - Hour and hundredths)
- 7) Press the appropriate Function Key for the Bad Clock Ring (BT, OL, IL, MV or ET)
- 8) Enter the appropriate Operation Number if Bad Clock Ring is for a BT, IL, or MV
- 9) Swipe Employee Badge or enter EIN
- 10) Press the "CLEAR" key after the LAST transaction has been completed

### **AUTHORIZING HIGHER LEVEL**

Supervisors who are issued authorizing badges may authorize higher level at the EBR for their subordinate employees. A password is needed for this type of authorization. All higher level authorizations must be supported by properly completed PS Forms 1723. PS Forms 1723 for one week or longer should be

## DRAFT

### TACS TRAINING

provided to your local TACS Office for input into Employee File Maintenance as Temporary Job Assignment (TempJA), eliminating the need for daily manual higher level authorizations by supervisor. In the following example, 8 hours of higher level is authorized for Level 15, RSC E, beginning at 1000 on March 21.

**Note:** Manual Higher Level authorization entries are not required for employees moving to pre-determined “auto” higher level operation numbers, provided they meet the base criteria to qualify (Reference Auto Higher Level Module 7, page 135). Supervisors with employees qualifying for auto higher level must regularly run an Auto Higher Level Report from the Employee Reports Module to ensure only “qualifying” employees are paid auto higher level. All instances of “auto” higher level must be properly documented on PS Form 1723.

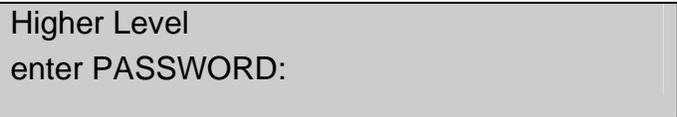
The first step for entering the higher level authorization is pressing the HL Function Key, located on the left side of the EBR keyboard.

When HL is selected, the EBR displays the following screen:



Higher Level  
swipe AUTHORIZER BADGE

When the supervisor swipes his or her badge through the EBR, the screen prompts:



Higher Level  
enter PASSWORD:

When the four digit password has been entered correctly, the screen prompts:



HL  
Enter EMPLOYEE # from pad or swipe BADGE

## DRAFT

### TACS TRAINING

When the employee's badge has been swiped through the EBR or the EIN is entered from the numeric keypad, the screen will display the employee's EIN as follows:

```
HL 12345678 E-  
use SEL to select RSC – use ACC to accept
```

If E is not the Rate Schedule Code (RSC) needed, use the SEL key to scroll through and choose the appropriate RSC. Normally, you will use only 4 RSC codes - M=Mail Handlers; P=APWU positions; Q=City Letter Carriers; E=Executive and Administrative (EAS). When the desired RSC is displayed, press the ACC key. The screen prompts:

```
HL 12345678 E-  
enter LEVEL from numeric keypad
```

After the level (15) is entered from the numeric keypad, the screen display prompts:

```
HL 12345678 E-15  
enter HL HOURS Authorized (HH.hh):
```

After the hours authorized (0800) have been entered from the numeric keypad, the screen display prompts:

```
HL 12345678 E-15 08.00  
Month:
```

Enter the calendar month (03) in two digits from the numeric keypad. The screen display prompts:

```
HL 12345678 E-15 08.00 03  
Day:
```

## DRAFT

### TACS TRAINING

Enter the calendar day (21) the higher level is scheduled to begin, not necessarily the time and attendance day. After the day is entered from the numeric keypad, the display prompts:

```
HL 12345678 E-15 08.00 03/213-27
enter START TIME (HH.hh):
```

Enter the time the higher level is to BEGIN (Hours and hundredths). This time should coincide with the first ring associated with the higher level (i.e., if full day and employee's BT is 10.00, the start time for the higher level authorization should be 10.00). After the start time (1000) has been entered from the numeric keypad, the screen display will prompt:

```
HL 12345678 E-15 08.00 03/21 10.00
enter ACC to accept – Clear to reject
```

If data is correct, press the "ACC" key to process the transaction. The screen will remain locked in for the next identical HIGHER LEVEL transaction. If you do not enter a transaction within a short period of time, the system will automatically log you out of the authorizing function and the screen will clear. To manually exit, press "Clear."

If data is incorrect, press the CLEAR key and start again.

**Note: ALL higher level must be supported by a properly completed PS Form 1723 (Assignment Order).**

**Higher Level Authorization Input Overview:**

1. Press the "HL" key
2. Swipe Authorizer Badge
3. Enter Password
4. Swipe Employee Badge or enter EIN
5. Press the "SEL" key to select the RSC (Rate Schedule Code)
6. Press the "ACC" key to accept the RSC selected
7. Enter the Level (2 digits)
8. Enter Number of Higher Level Hours Authorized
9. Enter Month (two digits)
10. Enter Calendar Day I-Higher Level is to Begin (2 digits)
11. Enter Time Higher Level is to Start (4 digits Hours and hundredths)
12. Press the "ACC" key to complete the transaction (or CLEAR/EXIT to start over)
13. Press the "CLEAR" or "EXIT" key after the LAST transaction has been completed

**Note: In the event more hours are worked at the higher level than were originally authorized, a change to the original authorization will be required or a second HL authorization must be made for the additional hours.**

## AUTOMATIC HIGHER LEVEL

TACS will automatically calculate and process higher level premiums for specific type of employees when working certain positions when the qualifying employee swipes to pre-determined auto higher level operation numbers. The employee must be assigned a qualifying LDC and D/A code and be tagged as "Auto Higher Level" in the Employee Master File for the system to automatically generate the higher level. For example, a mail processor, DA 41-0, Level 5, LDC 1100, who is assigned to manual cases and instructed to move to Operation 030, is paid level 6 automatically for the amount of time the employee is in that operation. The higher level will automatically end when the employee moves to an Operation Number for which higher level is not authorized or punches OL or ET.

Automatic Higher Levels are generated for the following positions:

### 1. OCR Operator (Mail Processor) to Manual

*Employee's Base Criteria:*

*Level = P-05*

*LDC = 1100*

*D/A = 11-0, 31-0, 41-0*

*Automatic higher level as P-06 for hours in Operation Numbers:*

*0300-0330, 0370-0400, 0430-0450, 0500-0550, 0600, 0620-0630, 0690-0700, 0730-0780, 0900, 1000, 1020, 1030, 1500-1510, 1600-1610, 1700-1720, 1750-1760, 1780-1790.*

### 2. CFS Clerks to Mail Processing

*Employee's Base Criteria:*

*Level = P-05*

*LDC = 4900*

*D/A = 11-0, 31-0, or 41-0*

*Automatic higher level as P-06 for hours in Operation Numbers:*

*0300-0330, 0370-0400, 0430-0450*

**3. Vehicle Operators to Tractor Trailer**

*Employee's Base Criteria:*

*Level =P-06*

*LDC =*

*D/A =13-5, 23-5, 23-6, 33-5, 43-5,*

*Automatic higher level as P-07 for hours in Operation Number 7660*

*Employee's Base Criteria:*

*Level =P-07*

*D/A =13-5, 23-5, 23-6, 33-5, 43-5,*

*Automatic higher level as P-08 for hours in Operation Number 7660*

**4. Mailhandler**

*Employee's Base Criteria:*

*Level =M-04*

*LDC =1700*

*D/A =12-0,32-0,42-0, 82-0*

*Automatic higher level as M-05 for hours in Operation Number 0100-0160, 2250, 2290, 2300*

## RESTARTING THE EBR WITH AN AUTHORIZER BADGE

1. Swipe the Authorizer badge.
2. Press the (SEL) key until the correct calendar day of the week appears. Then press the (ACC) key.
3. Enter the 2-digit numeric code for the month.
4. Enter the 2-digit numeric code for the day.
5. Enter the 2-digit numeric code for the year.
6. Enter the 2-digit numeric code for the hour.
7. Enter the 2-digit numeric code for the minute.\*
8. Enter the 2-digit numeric code for seconds.
9. If all parameters are correct, press the (ACC) key to accept the setting. If the setting is incorrect, press the (Clear) key to reject.

Setting Clock	Fri	11/27/00	10:05:00
Enter ACC to Accept		CLEAR to Reject	

**\*Minutes are used for manual resetting. The clock will automatically convert to hundredths upon pressing the (ACC) key. The next poll will automatically re-sync the clock(s).**

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# **APPENDICES**

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## **APPENDIX 1 – Keyboard Shortcuts**

# DRAFT

## KEYBOARD SHORTCUTS

### SHOW KEYS

Function	Key
Block Menu	Ctrl+B
Clear Block	F7
Clear Field	F5
Clear Form	F8
Commit	Ctrl+S
Count Query	F12
Delete Record	Ctrl+Up
Display Error	Shift+Ctrl+E
Duplicate Field	Shift+F5
Duplicate Record	Shift+F6
Edit	Ctrl+E
Enter Query	F11
Execute Query	Ctrl+F11
Function 0	Shift+Ctrl+F10
Function 1	Shift+Ctrl+F1
Function 2	Shift+Ctrl+F2
Function 3	Shift+Ctrl+F3
Function 4	Shift+Ctrl+F4
Function 5	Shift+Ctrl+F5
Function 6	Shift+Ctrl+F6
Function 7	Shift+Ctrl+F7
Function 8	Shift+Ctrl+F8
Insert Record	Ctrl+Down
List of Values	Ctrl+L
List of Values	F9
List Tab Pages	F2
Module Defined Key	F6
Next Field	Tab
Next Primary Key	Shift+F7
Next Set of Records	Shift+F8
Previous Field	Shift+Tab
Print	Ctrl+P
Return	Return
Scroll Down	PageDown
Scroll Up	PageUp
Show Keys	Ctrl+K
Update Record	Ctrl+U

# DRAFT

## BUTTON SHORTCUTS

Button Name	Short-Cut
Clear	Alt-l
Find	Alt-f
Add	Alt-a
Delete	Alt-d
Change	Alt-h
Save	Alt-s
Close	Alt-c
Help	Alt-p
Duplicate	Alt-u
Calc	Alt-l
PreProc	Alt-o
Job Assgn	Alt-g
Add -CANCEL	Alt-n
Change -CANCEL	Alt-n
Next Emp	Alt-n
Conv Table	Alt-o
Run	Alt-u
Diff Wk/JA	Alt-w
Add All Fin	Alt-n
Force Save	Alt-v

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## **APPENDIX 2**

### **TACS Reports**

## *DRAFT*

# TACS Reports

There are a total of 85 different reports TACS. Reports are grouped into specific Modules, as listed below.

**Active Operations Reports (3)**: This module contains three reports allowing users access to information regarding active Operation Numbers and Local Units (LUs).

- **Active Operations Report** is a listing of operations and local units that have been "turned on" or made valid for a particular Finance Number.
- **National Authorized Operations Report** provides a listing of nationally authorized operations for each office category type.
- **Operation Errors** provides a list of employees assigned to base operations that have been deactivated. This report should be run in the TACS office when changes to operation numbers are announced.

**AdjustPay Reports (5)**: This module contains five reports allowing users access to information regarding adjustments that have been entered and/or processed in AdjustPay. The reports provide information on the employee(s) adjusted and individual(s) authorizing/entering the adjustments.

**Badge Reports (3)**: This module contains three reports allowing users access to information regarding Badge Assignments, Unassigned Badges and Badge Type Listings.

**Clock Ring Reports (10)**: This module contains ten reports allowing users access to information regarding clock rings.

- **Clock Ring Errors Report** displays errors on a clock ring or set of clock rings that can not be posted for an employee. The report will also show employee records without time posted for a scheduled day or out of crossfoot any day.
- **Missing Time Report** shows employee records without time posted for a scheduled day or out of crossfoot on any day.
- **Overtime Alert Report** lists employees in an overtime status or approaching overtime for the week.

## *DRAFT*

- **Overtime and Leave Report** lists employees with both overtime and leave on the same day.
- **Raw Ring Errors Report** shows raw ring errors.
- **Ring Disallowance Report** lists employee clock-generated badge swipes that have been changed by a supervisor or timekeeper so that time is, in effect, "disallowed."
- **Self-Adjustment Report** lists all the users who made any type of change to their own clock rings.
- **Tour Deviations Report** is designed to allow the user the ability to select employees who deviate from their assigned schedule and/or lunch amounts.
- **Unauthorized Overtime Report** lists employees with overtime worked without a corresponding 091 transaction entered.
- **Unscheduled OT Report** lists employees who have worked Overtime without prior approval from supervisor – should be documented on PS Form 1017-B, *Unauthorized Overtime Record*.
- **Scheduled Day off Overtime Report** lists employees with overtime on a scheduled day off.

**Employee Reports (11)**: This module contains eleven reports allowing users access to information regarding individuals or groups of individuals at a specific location.

- **Authorized Higher Level Report** lists employees with authorized Higher Level on a daily basis via an 090 transaction in the CRE.
- **Automatic Higher Level Report** lists employees who have the Automatic H/L indicator checked and have worked an operation number that entitles them to automatic higher level.
- **Employee All Report** lists almost every thing in the TACS database for a particular employee for a particular year, pay period and week.
- **Employee File Comparison Report** lists TACS employees found with differences between what is in the employee master file on the mainframe (DDE) and the TACS application.
- **Employee Listing Report** lists the employees within a finance number, pay location or multiple locations.
- **Employee Moves Report** displays the operations an employee has worked during the week.

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- **Employees on the Clock Report** will display all employees on the clock at the designated time.
- **Higher Level Details Report** will generate a report listing employees on TempJA with different RSC or same RSC with Higher Level.
- **LTD Duty/REHAB Report** displays total hours to date on each operation for each employee on limited duty or rehabilitation. These are employees on Operation 959, or whose base Labor Distribution Code is 6900.
- **Carrier Moves Report** displays moves for letter carriers only.
- **HR to TACS Report** shows any employee for which the HRSSC has entered a transaction.

**Finance Reports (7):** This module contains seven reports allowing users access to information regarding the finances for their unit.

- **Hours and Dollars Report** displays the hours worked and an approximation of the cost, in dollars, for the selected criteria: Pay Location, Finance Unit, Finance Number, weekly or range of weeks.
- **LDC/Operation Summary Report**
  - **The Operation Summary Report** totals work hours, overtime hours and sick leave hours by Operation or Operation/Local Unit code. These reports are based on operation hours attributed to the Finance Number you have selected.
  - **The LDC Summary Report** totals work hours, overtime hours and sick leave hours by LDC, LDC/Operation, or LDC/Operation/Local Unit code.
- **Station Summary Report** lists work, overtime and sick leave hours by LDC for carrier stations.
- **Finance Description Report** will display information on Finance Number(s) selected, including ROG codes, CAG and office type.
- **Flash Reference Report** provides line item data totaling hours by LDC within function.
- **Finance Unit Descriptions Report** provides descriptions of Finance Units and Pay Locations.
- **Non-Mail Handler Casual Report** provides, for the Mail Handler's Union, a report of non-mail handler employees who worked in specified mail handler operations.

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**LTATS Reports (4)**: Listed below is an explanation of the four reports available in this module.

- **LTATS - Loaned Employee Report** displays employees 'loaned to' another office. Report displays: work hours, overtime, and Penalty Overtime.
- **LTATS - Missing CAG A to G Report displays missing LTATS (1236s)** for small timecard offices.
- **LTATS - Summary Report** displays work and overtime hours that have been transferred to a different LDC/DA or loaned to another office.
- **LTATS Estimated Transactions Report** displays detail information on transactions transferring work hours.

**Miscellaneous Site Report (1)** provides site descriptions and Finance and IS contacts for that site.

**PPWk Reports (8)**: This module contains eight reports allowing users access to view and print various pay period reports from both timecard and timeclock offices.

- **Non-Crossfoot Errors Report** lists employees whose time is not in crossfoot for the week. The report is designed to be a tool recommended for use when you are ready to release T&A data at the end of the week.
- **Pay Week Status Report** provides information regarding time transmitted to Eagan Mainframe.
- **Weekly Form 1261 Report** provides clock rings in 1261 format for employees with 1261 indicator checked.
- **Weekly Total Hours Report** provides the total amount of hours for each hours code and reason type recorded for the week.
- **Pay Period Report** provides the status of aggregate pay period clock ring data.
- **Pay Week Status Detail Report** provides pay period status for individual employees: on hold, ready to upload or closed.
- **Time Certification Report** provides the final certifications for a given pay period.
- **Time Certification Differences Report** provides any differences in time certifications by pay period.

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**REBR Reports (7):** This module contains seven reports allowing users access to information regarding rural routes that record time via an EBR. (REBR will be retired at the end of Fiscal Year 2012. At that time these reports will become deleted from the TACS application.)

- **Replacement Carrier Daily Hours Report**
- **Daily Overtime by Day Report**
- **Clock Ring Errors Report**
- **Non Crossfoot Report**
- **Employee By Route Report**
- **Certificates Sign Off Report**
- **Second Trip Report**

**RTACS Reports (10):** This module contains ten reports allowing users access to information regarding rural routes that record time manually (timecard).

- **Pay Period Status (PP Status):** This report gives the number of certificates expected, received and missing for all regular and auxiliary routes. Run this report to determine how many carriers are missing for a finance number after all the rural certificates are entered.
- **2080 Report:** This report gives the total number of actual work hours for the regular carriers under FLSA Code B, for the current guarantee year.
- **DACA Codes Report:** Displays all the employees for a finance number that used a particular DACA Code.
- **Eval/Actual Work Hours:** Calculates a percentage difference between actual and evaluated hours, by route, for the pay period.
- **Replacement Carrier Inquiry Report:** Displays all replacement carriers along with the routes and hours worked for that pay period.
- **Replacement Carrier Weekly Hours Report:** Total hours worked by replacement carriers in an office.

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- **Daily Overtime by Week Report:** Displays all regular carriers that had daily overtime entered on the certificate.
- **Missing Certificates Report (Miss Cert):** Lists any carrier whose certificate is missing for the pay period.
- **Employee All Report:** Displays the weekly total hours worked by route number.
- **Certificate Sign Off Report:** This report must be pulled after you have entered the rural certificates. If a certificate is in error, “---Invalid---“ will display at the top of the timecard. This report lists all PS Forms 1314 in numeric order by route, followed by PS Forms 1314-A.

**Schedule Reports (7):** This module contains seven reports allowing users access to information regarding employees’ schedules and hours utilization.

- **Guarantee Waivers/No Lunch Report** displays authorizations for Guaranteed Time Waivers (Transaction Code 092), and No Lunch Waivers (Transaction Code 093).
- **Hours Analysis Report** displays work, overtime, sick leave and annual leave hours for each employee.
- **Hours Type Inquiry Report** lists employees with specific hours type and/or hours reason codes.
- **Master Schedule Report** identifies predefined schedules (Schedules 1-22; 700-714) as well as any additional locally added schedules.
- **Holiday Report** is designed to list employees who are due holiday leave during the current week, but the system will not generate the leave or holiday work because the employee is an hourly rate regular (DA 3XX) or the employee is a rehab employee (LDC 6900). This report is only available during weeks that contain a holiday.
- **Daily Hours Report** lists employees in, Finance Number, Sub-Unit and Employee order. The first line for each employee is the indicative data (Employee Id, Name, RSC, LDC, etc.). The next line will be the base hours the employee has worked in his/her base job. Subsequent lines will reflect any hours worked in higher level positions.
- **Schedule Report** lists employees that are in selected schedule(s).

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**Timecard Entry Report (3)**: This module contains three reports allowing users access to information regarding timecard weekly payroll information for manual timecard offices.

**User Reports (5)**: This module contains five reports providing information regarding TACS Users access and log-on history.

- **The User Access Report** provides a list of users who have access to the TACS application
- **The User Log Report** provides a list of users who have logged into and out of TACS.
- **Template Report** provides a listing, by template, of all employees under that template.
- **User Not Logged Report** provides a listing of users that have not logged into the TACS application within a selected Date/Time range.
- **User Last Login Report** provides a list of the last date and time users logged into the TACS application.

**Valid Codes Report (1)**: provides listing all of the valid codes or a selected Valid Code from the Valid Codes table.

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## **APPENDIX 3**

# **Hours/Reasons Codes**

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## Hours Codes/Reason Codes

### HOURS CODES

<b>CODE</b>	<b>DESCRIPTION</b>
010	BEGIN TOUR
011	OPERATION MOVE
012	OUT TO LUNCH
013	IN FROM LUNCH
014	END OF TOUR
024-00	AWOL
024-09	AWOL-LATE
028	HOLIDAY ANNUAL LEAVE EXCH
032	TELETIME
033	GUARANTEE TELETIME
034	BEEPER TIME
035	EXTRA STRAIGHT TIME
036	GUARANTEE TELE OVERTIME
043	PENALTY OVERTIME
044	MILITARY LWOP
045	DONATED LEAVE
046	FMLA - DONATED LEAVE
048	HOLIDAY SCHEDULING PREMIUM
049-00	OWCP-REGULAR
049-99	IOD/OWCP-FAMILY MEDICAL LEAVE
052	WORK HOURS
053	OVERTIME
054	NIGHT WORK
055-00	ANNUAL LEAVE-REGULAR
055-01	ANNUAL LEAVE-IN LIEU OF S/L
055-09	ANNUAL LEAVE-LATE
055-10	ANNUAL LEAVE-EMERGENCY
055-14	ANNUAL LEAVE-BEREAVEMENT
055-95	ANNUAL LEAVE-FMLA QUALIFYING EXIGENCY
055-96	ANNUAL LEAVE-FMLA SVC MEMBER
055-99	ANNUAL LEAVE-FAMILY MEDICAL LV
056-00	SICK LEAVE-REGULAR

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056-09	SICK LEAVE-LATE
056-11	SICK LEAVE-RESTRICTED
056-14	SICK LEAVE-BEREAVEMENT
056-96	SICK LEAVE-FMLA SVCMEM DEP CAR
056-97	SICK LEAVE-DEPENDENT CARE
056-98	SICK LEAVE-FMLA/DEPENDENT CARE
056-99	SICK LEAVE-FAMILY MEDICAL LVE
057	HOLIDAY WORK
058	HOLIDAY LEAVE
059-00	PART DAY LWOP
059-01	PART DAY LWOP-IN LIEU OF SICK
059-02	PART DAY LWOP-PROFFERED
059-03	PART DAY LWOP-PERSONAL
059-04	PART DAY LWOP-OTHER
059-05	PART DAY LWOP-MATERNITY
059-06	PART DAY LWOP-SUSPENSION
059-08	PART DAY LWOP-SUS PENDING TERM
059-09	PART DAY LWOP-LATE
059-14	PART DAY LWOP-BEREAVEMENT
059-59	PART DAY LWOP-GENERATED
059-95	PART DAY LWOP-FMLA QUALIFYING EXIGENCY
059-96	PART DAY LWOP-FMLA SVC MEMBER
059-99	PART DAY LWOP-FAMILY MED LEAVE
060-00	FULL DAY LWOP
060-01	FULL DAY LWOP-IN LIEU OF SICK
060-02	FULL DAY LWOP-PROFFERED
060-03	FULL DAY LWOP-PERSONAL
060-04	FULL DAY LWOP-OTHER
060-05	FULL DAY LWOP-MATERNITY
060-06	FULL DAY LWOP-SUSPENSION
060-08	FULL DAY LWOP-SUS PENDING TERM
060-09	FULL DAY LWOP-LATE
060-14	FULL DAY LWOP-BEREAVEMENT
060-95	FULL DAY LWOP-FMLA QUALIFYING EXIGENCY
060-96	FULL DAY LWOP-FMLA SVC MEMBER
060-99	FULL DAY LWOP-FAMILY MED LEAVE
061	COURT LEAVE
062	GUARANTEE TIME
063	TRANSITIONAL EMP-NEGATIVE CROS
065	MEETING TIME

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067	MILITARY LEAVE
068	GUARANTEE OVERTIME
069	BLOOD LEAVE
070	STEWARD DUTY TIME
071-00	COP-REGULAR
071-99	COP-FAMILY MEDICAL LEAVE ACT
072	SUNDAY PREMIUM
073	OUT OF SCHEDULE PREMIUM
074	CHRISTMAS WORK
076	NON-SCHEDULED TIME
077	CIVIL DEFENSE LEAVE
078	ACT OF NATURE LEAVE
079-00	HQ AUTHORIZED ADMIN LEAVE
079-02	NATIONAL DAY OF MOURNING
079-43	HQ AUTHORIZED ADMN LV-INAUGURA
079-67	HQ AUTHORIZED ADMN LV-MILITARY
080	RELOCATION LEAVE
081	CIVIL DISORDER LEAVE
082	TRAVEL INSIDE OF SCHEDULE
083	TRAVEL OUTSIDE OF SCHEDULE
084	UNION OFFICIAL LEAVE
085	VOTING LEAVE
086-00	OTHER PAID LEAVE
086-74	DISCIPLINARY DAY OF REFLECTION
087-71	RELIEF DAY TAKEN
088	NON-BARGAINING RESCHEDULE PR
090	H/L AUTHORIZATION
091	OVERTIME AUTHORIZATION
091-01	OT AUTH-BEFORE SCHED TOUR OT
091-02	OT AUTH-AFTER SCHED TOUR OT
091-03	OT AUTH-FULL TOUR OVERTIME
091-04	OT AUTH-BEF SCHED TR-OUT OF SCH
091-05	OT AUTH-AFT SCHED TR-OUT OF SCH
091-06	OT AUTH-FULL TOUR-OUT OF SCHED
092	DISALLOW GUARANTEE TIME
093	NO LUNCH PUNCH

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## **RURAL DAYS ASSIGNED ABSENT CODES**

### **DACA codes on Form 1314**

A = Annual Leave (may not exceed leave balance)
B = Holiday worked on a non-rural assignment
C = Continuation of Pay (Full days only)
D = Donated Leave
E = Limited Duty (Do NOT include these hours in Actual Work hours, will not pay EMA)
H = Holiday Leave
J = NS Day for J route
K = NS Day for K route
L = LWOP (Note – use N for Military LWOP)
M = Military Leave
N = Military LWOP
O = Other Leave
P = Work Assignment other than rural (will not pay EMA)
R = Relief Day Worked (earns X day)
S = Sick Leave (may not exceed balance)
T = Training (will not pay EMA)
U = Absent Without Leave (AWOL)
V = Holiday Work
W = IOD/LWOP (Injured on Duty/Leave Without Pay)
X = Relief Day Taken (D/A 71/0 – earned for working R, Y or 3 DACA day)
Y = Relief Day Worked on a Non rural Assignment (Earns X day)
Z = Steward Duty (Work on Day Off)
2 = National/Local Authorized Administrative Leave (HQ Approved Only)
3 = Relief Day Worked (Earns X day and 50% Premium)
4 = Disciplinary Day of Reflection
5 = Relief Day Worked paid at 150% (No X day Earned)
6 = Court Leave

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## **“N – No Service” Codes**

### **Codes on Form 1314-A**

Annual Leave	N
Sick Leave	N
Leave Without Pay (LWOP)	N
Other Leave (Administrative Leave)	N
Military Leave	N
Donated Leave	N
Continuation of Pay	N
Nat/Loc Admin Leave (HQ Approved)	2
Holiday (Actual Holiday)	H

**Note:** Enter leave in the appropriate boxes on Form 1314-A underneath the **Leave – Whole Hours** section of card.

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**APPENDIX 4**

**Pull Time Schedule**

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Below are the times that the T&A records are pulled from TACS and sent to the Mainframe in Eagan.

NOTE - All times listed are in *CENTRAL time*.

### **Week 1:**

**Close is Monday night of week 2 at the following times:**

17:00 – TACS 01 and TACS 05  
18:00 – TACS 03 and TACS 06  
19:00 – TACS 08 and TACS 09  
20:00 – TACS 10 and TACS 11

### **Week 2 (4 pulls):**

**1- Friday (of week 2):**

17:00 – TACS 01 and TACS 05  
18:00 – TACS 03 and TACS 06  
19:00 – TACS 08 and TACS 09  
22:00 – TACS 10 and TACS 11

**2- Saturday (of following week 1):**

17:00 – TACS 01 and TACS 05  
18:00 – TACS 03 and TACS 06  
19:00 – TACS 08 and TACS 09  
20:00 – TACS 10 and TACS 11

**3- Sunday (of following week 1):**

17:00 – TACS 01 and TACS 05  
18:00 – TACS 03 and TACS 06  
19:00 – TACS 08 and TACS 09  
20:00 – TACS 10 and TACS 11

**4- Monday (of following week 1):**

17:00 – TACS 01 and TACS 05  
18:00 – TACS 03 and TACS 06  
19:00 – TACS 08 and TACS 09  
20:00 – TACS 10 and TACS 11