



July 16, 2021

DISTRICT MANAGERS
SENIOR DIVISION DIRECTORS, PROCESSING OPERATIONS
DIRECTORS, FIELD LABOR RELATIONS
DIRECTORS, FIELD HUMAN RESOURCES
EXECUTIVE MANAGERS, FINANCE & BUDGET (AREA/REGION)

SUBJECT: Lead Clerks Performing Timekeeping Duties in TACS

Settlements reached in any stage of the grievance-arbitration procedure are final and binding. As such, compliance with grievance settlements is **mandatory**. With that maxim in mind, the Postal Service is committed to the proper training and assignment of Lead Clerks to perform timekeeping duties in the Time and Attendance Collection System (TACS).


The Lead Clerk positions assigned to Function 1 and Function 4 were created through the Memorandum of Understanding (MOU), *Re: Clerk Craft Jobs*, a negotiated provision of the 2010-2015 USPS/APWU collective bargaining agreement. In establishing responsibilities for this new position, the parties agreed that Lead Clerks would be assigned to timekeeping duties in TACS (see May 4, 2012, Lead Clerk Questions and Answers, attached, and the Lead Clerk position descriptions).

Despite that commitment, one of the most conspicuous grievance-generating issues that continues to be seen in the field is non-compliance with the requirement to assign Lead Clerks to perform timekeeping duties in TACS. In response, the APWU initiated several national-level disputes. Those disputes were ultimately resolved through national-level settlement agreements, copies of which are attached to this memorandum.


Unfortunately, non-compliance with these settlement agreements has generated financial liabilities at both the District and Area levels, which has resulted in millions of dollars in grievance payouts. **Such payouts are avoidable and unacceptable.** Avoidable financial liabilities are especially disturbing at a time when the organization is undertaking a phase of transformation designed to achieve financial sustainability.


To ensure compliance going forward, attached to this memorandum are two documents (one for Mail Processing, the other for Retail and Customer Service) that provide step-by-step instructions, utilizing cross-functional teams at the District and Division levels, for ensuring that Lead Clerk TACS training and responsibilities are properly assigned. It is our expectation that use of these documents, along with cross-functional cooperation and collaboration, results in no further liability for Lead Clerk TACS compliance.

Questions regarding this memorandum should be directed to your local Labor Relations office. Thank you in advance for your cooperation.


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Vice President
Labor Relations


Angela H. Curtis
Vice President
Retail and Post Office Operations


Mike L. Barber
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Cara M. Greene
Vice President
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Attachments

cc: All Officers

Steps	Actions Needed	Task Owner
	District LR Manager or Designee serves as the Project Compliance Team Lead	Cross Functional District Compliance Team: District Labor Relations/ HR/Finance/ Plant Operations
Roll-Out	LR must schedule a meeting with HR, Finance (TACS Coordinator), Plant Manager, MDOs and SDOs to discuss the contractual provisions to ensure compliance with the Clerk Craft Jobs MOU and the Lead Mail Processing Clerk and "TACS Duties".	District Labor Relations
Roll-Out	Review the Job Description of the Lead Mail Processing Clerk and the Lead Clerk Clock Office Role TACS Duties which must be performed by the Lead Mail Processing Clerks. Processing Operations should be encouraged to utilize the Lead Processing Clerk optimally to perform all administrative tasks associated with their work area. (e.g., Run the End-of Run Reports/count mail/ coordinate and direct employees to take breaks and lunches and coordinate replacements on machines etc.)	District Labor Relations
Roll-Out	If requested, Headquarters Field Labor Relations can present the Continuing Education Session on Lead Clerks and Clock Office Role to the District Compliance Team.	District Labor Relations
1	Run a HCES Report of all Lead Mail Processing Clerks Duty Assignments both vacant and filled.	District Human Resources
2	Run a Training Report Record of all current Lead Mail Processing Clerks to identify the Lead Clerks who have received the Lead Clerk Clock Office Role Training #31267-01 Time and Attendance Collection System-Supervisor Training and LMS Course #10025624, Lead Clerk Overview Training	Learning Development & Diversity
3	Determine if Lead Mail Processing Clerks are performing the "TACS Duties" in the processing plant.	Plant Operations
4	Identify duty assignments which may already have "TACS Duties" annotated in the Job Comments of the Duty Assignments.	District Human Resources
5	Determine if the incumbents of any Duty Assignments identified in Step #4 have been trained (#2) and are performing the "TACS Duties".	Plant Operations and LDD
6	If no Lead MPC duty assignments have "TACS Duties" annotated in the Job Comments of the Duty Assignments, identify those duty assignments of Lead Clerks who are currently performing the TACS Duties and apply Step 7.	Plant Operations and HR Local Services
7	HR Local Services must take the necessary actions with HRSSC to officially add " <i>Will Perform TACS Duties – Must complete required TACS training</i> " to the HCES Job Comments on the current Lead Clerk duty assignments that will be performing TACS duties.	HR Local Services
8	Identify all Lead Clerks who will be designated to perform the TACS Duties in the plant and schedule the necessary training	Plant Operations and LDD
9	Plant Operations must determine if additional Lead Mail Processing Clerks must have TACS duties added to their duty assignments in order to ensure the work is being performed by the bargaining unit at all times	Plant Operations
10	Meet with the Local APWU during the compliance process. The LMOU may require a discussion for any changes made to a duty assignment.	Labor Relations and Plant Operations
11	Duty Clarification Letters must be sent to specific Lead Clerks informing them that TACS duties will be added to Bid Comments in HCES with copies to the Local Union.	Labor Relations and Plant Operations
12	Schedule the Necessary Training. District TACS Coordinator conducts the training for Course #31267-01. Training may be In-Person or Virtual.	L D & D and District Finance (TACS Coordinator)

Steps	Actions Needed	Task Owner
13	District must establish a Standard Operating Procedure to ensure the training is scheduled as soon as the successful bidder on a Lead Clerk Duty Assignment is identified in a Bid Award Posting.	HR Local Services and Learning Development & Diversity and Finance
	<p>If there is a mail processing location at which no clerks have been given the Lead Clerk Clock Office Role training and Lead Clerks are not performing any TACS duties:</p> <ul style="list-style-type: none"> * Identify all Lead Clerks in Facility by Seniority Assign TACS duties to Senior Clerk or make mutual agreement with local union to an alternate Lead clerk in lieu of the senior clerk to be assigned the TACS duties in each location (tour) in the plant. * Meet with Local Union to discuss any LMOU provision regarding changes to bid duty assignments which might require reposting due to the addition of duties to an occupied duty assignment. * Duty Clarification Letters must be sent to specific Lead Clerks informing them that TACS duties will be added to Bid Comments in HCES with copies to the Local Union. * HR Local Services must send the language changes to HRSSC to officially change the comments on the bid posting. (Keep the language on each bid consistent) 	

Steps	Actions Needed	Task Owner
	District LR Manager or Designee serves as the Project Compliance Team Lead	Cross Functional District Compliance Team: District Labor Relations/ HR/Finance/ Retail and Delivery Operations
Roll-Out	LR must schedule a meeting with HR, Finance (TACS Coordinator), and Retail and Delivery Management to discuss the contractual provisions to ensure compliance with the Clerk Craft Jobs MOU and the LSSA and Lead Customer Service Clerks and "TACS Duties".	District Labor Relations
Roll-Out	Review the Job Description of the Lead Sales and Service Associate and the Lead Customer Service Clerk and the Lead Clerk Clock Office Role TACS Duties which must be performed by the Lead Clerks. Review the LSSA Participant Training Guide for Cours 1002330 to familiarize the Retail Managers and Supervisors of all the duties which should be performed by LSSAs. Encourage Retail and Delivery Management to utilize the LSSA and Lead Customer Service Clerks optimally to perform all administrative duties as listed in the job descriptions.	District Labor Relations
Roll-Out	If requested, Headquarters Field Labor Relations can present the Continuing Education Session on Lead Clerks and Clock Office Role to the District Compliance Team.	District Labor Relations
1	Run a HCES Report of all Lead Sales and Service Associates, Lead Customer Service Clerks and Lead Mail Processing Clerk Duty Assignments both vacant and filled.	District Human Resources
2	LD & D run a training report of all Lead Sales and Service Associates and Lead Customer Service Clerks to identify those who have been trained on the: - LMS Course #10025624, Lead Clerk Overview Training -Course #31267-01 Time and Attendance Collection System - Supervisor Training	Learning Development and Diversity
3	LD & D run a training report of all Lead Sales and Service Associates to identify those who have received the required training: -Course #10023330 Lead Sales and Services Associate (LSSA)	Learning Development and Diversity
4	Determine if Lead Clerks are performing the "TACS Duties" .	Retail and Delivery Operations
5	Identify duty assignments which may already have "TACS Duties " annotated in the Job Comments of the Duty Assignments.	District Human Resources

Steps	Actions Needed	Task Owner
6	Determine if the incumbents of any Duty Assignments identified in Step #4 have been trained (#2) and are performing the "TACS Duties".	Retail Delivery Operations and LDD
7	If no LSSA or Lead Customer Service Clerks duty assignments have "TACS Duties" annotated in the Job Comments of the Duty Assignments, apply Step 8.	Retail and Delivery Operations and HR Local Services
8	HR Local Services must take the necessary actions with HRSSC to officially add <i>"Will Perform TACS Duties – Must complete required TACS training"</i> to the HCES Job Comments on the current LSSA duty assignments that will be performing TACS duties.	HR Local Services
9	Provide the necessary training to all LSSAs and Lead Customer Service Clerks	Retail and Delivery Operations and LDD
10	Retail and Delivery management must determine if Relief LSSA duties could be added to an existing Level 6 SSA or SSDA duty assignment and add the TACS duties added to their duty assignments in order to ensure the work is being performed by the bargaining unit at all times. (See Text Box below)	Retail and Delivery Operations
11	Meet with the Local APWU during the compliance process. The LMOU may require a discussion for any changes made to a duty assignment.	Labor Relations and Retail and Delivery Operations
12	Duty Clarification Letters must be sent to specific Lead Clerks informing them that TACS duties will be added to Bid Comments in HCES with copies to the Local Union. (See Text Box below)	Labor Relations and Retail and Delivery Operations
13	Schedule the Necessary Training. District TACS Coordinator conducts the training for Course #31267-01. Training may be In-Person or Virtual.	L D & D and District Finance (TACS Coordinator)
14	District must establish a Standard Operating Procedure to ensure the training is scheduled as soon as the successful bidder on a Lead Clerk Duty Assignment is identified in a Bid Award Posting.	HR Local Services and Learning Development & Diversity and Finance
	Retail and Delivery Managers may consider changing an existing duty assignment of a level 6 Sales and Service Associate duty assignment and adding following language added to the Duty Assignment: "Relief Lead Sales and Service Associate. Serves as a replacement when the LSSA is off on non-scheduled days and leave."	
	The change to this position is in accordance with ELM 233.3 Criteria for Evaluating Mixed Assignments. Item 233.3b states, "Regularly scheduled on intermittent days in two bargaining unit positions. When a full-time employee is regularly scheduled on intermittent workdays to perform the work of two separate bargaining unit positions in different grades, the employee is placed in the position in which more than 50 percent of the time is spent. If the time is equally divided, the employee is placed in the higher grade position.	
	Therefore, the designated duty assignment will remain a Level 6 SALES, SVCS/DISTRIBUTION ASSOC position.	