



NATIONAL ASSOCIATION OF POSTAL SUPERVISORS

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August 29, 2024

Board Memo 120-2024: Leave Entries Entered into eRMS Effective September 18, 2024

Executive Board,

NAPS HQ has been informed of the USPS intent to centralize leave entry within the Employee Resource Management System (eRMS). Effective September 18th, all scheduled and unscheduled leave will be entered into eRMS.

Training for Lead Clerks to complete the eRMS Lead Clerk user role training was available starting July 15th.

Please share this information with your membership.

Thank you and be safe.

NAPS Headquarters

**CLERK CRAFT
LEAD CLERK
QUESTIONS & ANSWERS**

These questions and the responses are not intended to alter, amend, or change in any way the terms of the 2010-2015 Collective Bargaining Agreement.

1. Beginning June 1, 2012, can employees from other bargaining unit crafts (mail handlers, carriers, etc) be utilized in 204-B assignments to supervise Clerk Craft employees?

Answer: Beginning June 1, 2012, employees from other bargaining unit crafts may be utilized as 204-Bs, supervising Clerk Craft employees, to cover supervisory absences or vacancies of 14 or more consecutive calendar days. Usage of a 204-B in this exception is normally limited to no more than 90 days.

2. Can employees from these other bargaining unit crafts (mail handlers, carriers, etc) be utilized as 204-Bs in the Clerk Craft to cover supervisor absences or vacancies of less than 14 days?

Answer: No.

3. Are there any exceptions to the 90 day limit in #1, above?

Answer: Exceptions would only be appropriate in limited situations (such as supervisor on 4 months maternity leave; supervisor on 6 months military leave; or similar situations).

4. May Clerk Craft employees be utilized as 204-Bs to supervise employees in other bargaining unit crafts?

Answer: Yes, Clerk Craft employees may be utilized as 204-Bs to supervise employees in other bargaining unit crafts. When doing so, these 204-B assignments would be subject to the same restrictions regarding the supervisor absence or vacancy as within the Clerk Craft.

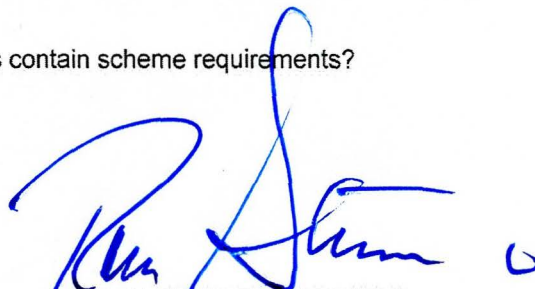
5. May Lead Sales & Service Associate duty assignments contain scheme requirements?

Answer: No. However, where employees are working in LSSA duty assignments which included scheme requirements that were grandfathered into the new LSSA position, those positions may continue to be required to have a scheme.

6. May Lead Customer Service Clerk duty assignments contain scheme requirements?

Answer: Yes.


Patrick M. Devine
Manager Contract Administration
Labor Relations
United States Postal Service


Rob Strunk
Director Clerk Division
American Postal Workers Union,
AFL-CIO

Date: August 14, 2012

CLERK CRAFT LEAD CLERK QUESTIONS & ANSWERS

These questions and the responses are not intended to after, amend, or change in any way the terms of the 2010-2015 Collective Bargaining Agreement.

1. How will the Lead Clerk duty assignments be created?

Answer: They will be newly created duty assignments posted for bid installation wide to the senior qualified bidder, in accordance with Article 37. Exception: Per item #2.C of the Clerk Craft Jobs MOU, existing LSSA's, Window Service Technicians and other existing clerk craft positions of a similar nature identified by the parties shall be grandfathered into the new position of Lead Clerk.

2. At what level will the Lead Clerk duty assignments be created?

Answer: They will be created at one level above other employees in the group. Lead Clerks will provide oversight, direction and support, in the absence of Supervisory presence to a group of bargaining unit employees.

3. Will the Lead Clerk have access to TACS records (clock rings) and can they make adjustments?

Answer: Yes, with the approval of the supervisor.

4. Will the Lead Clerk duty assignment have a principal assignment area?

Answer: Yes, in accordance with Article 37. However, the designation of a principal assignment area shall not impact the number of Lead Clerk positions, which are determined by the MOU ratio. In addition, based on operational needs, the Lead Clerk in Mail Processing could be directed to temporarily lead another group of clerks within the same facility and function, provided, when working in another area the movement is in accordance with the 2007 JCIM, Article 37, Q&A #142, as cited below:

142. Are full-time Mail Processing Clerks PS-06 limited to working only in their principal assignment area or can they be assigned to perform work in other mail processing areas?

Response: *Management may assign employees in accordance with operational needs and the employee's qualifications. However, if there is more than one Mail Processing Clerk working in a principal assignment area with the necessary skills, management will move Mail Processing Clerks out of their principal assignment area as needed by juniority.*

5. How will the Lead Clerk be scheduled for overtime, holiday scheduling, leave, etc.?

Answer: They will be scheduled in accordance with the LMOU and Collective Bargaining Agreement.

6. Can the Lead Clerk issue discipline or approve leave?

Answer: No.

7. Is the ratio of Lead Clerk assignments in the clerk craft complement in a facility based on the entire facility or by tour?

Answer: Facility clerk complement.

8. If there are five clerks in any facility, must a Lead Clerk duty assignment be created?

Answer: Yes, in accordance with item #2 of the Clerk Craft Jobs MOU which states, *"The Employer will fill duty assignments of a Lead Clerk in any facilities where clerks work without direct supervision and in facilities that have a minimum complement of five (5) clerks."*

9. Will Lead Clerk duty assignments be created in facilities where clerks work without direct supervision, even if there are less than five clerks?

Answer: Yes, in accordance with item #2 of the Clerk Craft Jobs MOU which states, *"The Employer will fill duty assignments of a Lead Clerk in any facilities where clerks work without direct supervision ..."*

10. Can you have a Lead Clerk duty assignment in CFS?

Answer: The parties agree that upon consultation with the Union at the National Level, Lead Clerk positions may be created in certain assignment areas with specific qualification requirements (example: CFS). However, the creation of these Lead Clerk duty assignments shall not impact the number of Lead Clerk duty assignments in the facility, which are determined solely by the MOU ratio.

11. In post offices where the supervisor maintained the floor stock and that supervisory job is eliminated, may the floor stock be transferred to the LSSA?

Answer: Yes, if the supervisory position is eliminated and separation of duties are maintained consistent with postal regulations and policies.

12. How will higher level details be made to the Lead Clerk duty assignment?

Answer: Higher level details will be made in accordance with Article 25 of the Collective Bargaining Agreement.

13. What happens if as the result of an excessing event a clerk facility's complement changes.

Answer: If there is an increase in facility clerk complement resulting in an increase of Lead Clerk duty assignments, due to the ratio, then the Lead Clerk duty assignments will be created accordingly. If there is a reduction, then the USPS may reduce the number of Lead Clerk duty assignments based on the ratio, however the impacted clerk(s) would receive saved grade pursuant to Article 37.4.C.6.

14. May the USPS create more lead Clerk assignments than the ratio listed in the MOU?

Answer: Yes. The MOU lists the minimum number of Lead Clerk duty assignments required.

15. If a section is undergoing excessing and/or there are clerks with retreat rights to a section and level where Lead Clerk duty assignments are being posted, will the assignment be posted installation wide?

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Answer: Based on Article 12 and the LMOU, Item 18, the posting may be limited to in-section bidding where the retreat rights are to a section and level.

16. Is there a difference between the Lead Sales & Services Associate (LSSA), and the Lead Customer Service Clerk (LCSC)?

Answer: Yes. The Lead Sales & Service Associate is utilized in a Function 4 facility with a retail/window operation. The Lead Customer Service Clerk (LCSC) will normally be utilized in a Function 4 facility that has no window/retail operation. In a large facility (50 or more clerks) with a retail window and a large distribution operation, there may be both based on operational needs and the MOU ratio. In this situation, you could have a Lead Sales & Services Associate for the window/retail, and a Lead Customer Service Clerk for the distribution operation, as operational needs require.

17. Are there any other current Level 7 clerk positions that can be grandfathered into Lead Clerk positions?

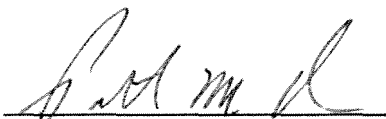
Answer: In accordance with Section 2.C of the Clerk Craft Jobs MOU, other existing clerk craft positions of a similar nature identified by the parties shall be grandfathered into the new position of Lead Clerk. This determination is made at the National Level.

18. Can Lead Clerk positions be posted as Non-Traditional Full-Time (NTFT) duty assignments?

Answer: Yes, provided they are posted in accordance with the Non-Traditional Full-Time (NTFT) Duty Assignments MOU. In Function 1 no more than 50% of all duty assignments in the facility may be NTFT duty assignments of 30-48 hours, unless otherwise agreed to by the parties. In Function 4, as many NTFT duty assignments as operationally necessary may be created.

19. What training and testing requirements will there be for the Lead Clerk positions?

Answer: Training will be provided, where necessary, to assist the Lead Clerk in providing oversight, direction and support to other employees and to perform administrative duties. It is anticipated that Lead Clerks will have, based on their experience, the ability to provide technical guidance to other employees.



Patrick M. Devine
Mgr. Contract Administration
Labor Relations
United States Postal Service



Rob Strunk:
Director Clerk Division
American Postal Workers Union,
AFL-CIO

Date: May 4, 2012

EMAIL:

From: MyHR system

To: All Field Managers and Field HR

Date: July 29, 2024

Subject: eRMS Modification- Lead Clerk User Role



MyHR

Dear [NAME]

To ensure greater visibility of data and information related to employee leave, efforts are underway to centralize this information within the Employee Resource Management System (eRMS), allowing for more accurate leave management and attendance reporting.

Currently, employees with timekeeping duties have the ability to record instances of scheduled and unscheduled leave in the Time and Attendance Collection System (TACS). In our efforts to centralize leave management, all leave will now be entered into eRMS. While this method of leave entry is not new for most of our timekeeping roles, Lead Clerks with timekeeping responsibilities will now need access to eRMS.

A new Lead Clerk user role has been created within eRMS providing limited leave management access as it pertains to their timekeeping tasks. Access will permit the authorized user to view the same set of data visible to them in TACS. Lead Clerks will not be permitted to view leave balances or access the Employee Information tab in the Leave Management module. The leave entry functionality in TACS will be disabled September 18th.

To ensure Lead Clerks are prepared to leverage these new tasks, eRMS Lead Clerk training has been developed and is now available in the My Learning library in HERO. Supervisors must assign the training to Lead Clerks that already have TACS access and timekeeping duties. Training can be assigned as early as today as employees must first successfully complete eRMS training prior to requesting eRMS access via ARIS.

Once access is granted, Lead Clerks will be able to navigate the following modules:

- **Leave Management-** to enter supervisor approved leave, edit, or remove previously submitted leave entries.
- **Call-In Log Reports-** to run an Incidental Leave Entry report that provides details of previous leave entered under your ACE ID by a date range selection.

For more information regarding the new eRMS access and training for Lead Clerks, please see the Frequently Asked Questions.

-HR Employment Policy and Programs



General

What is eRMS?

eRMS is the system used by the U.S. Postal Service to manage employee leave by way of the Interactive Voice Response system (IVR), Enterprise Leave Request Application (eLRA), and most notably within operations by entering leave requested on a P.S. Form 3971. The application also system-generates an email notification to management and a leave request message on the eRMS Home Module when an employee utilizes the IVR or eLRA method of requesting leave to have their absence recorded for proper compensation.

Why do I need eRMS?

eRMS has been modified from a management access only system to now include Lead Clerks. If you are a Lead Clerk with timekeeping duties, you will need eRMS access to enter supervisor approved leave. Leave entry capabilities in the Time and Attendance Collection System (TACS) will be disabled September 18th.

How do I obtain access to eRMS?

eRMS access can be requested via Access Registration and Identity Services (ARIS) after successful completion of the eRMS Lead Clerk training. Please see the [eRMS Home Page](#) for resources on how to request eRMS access.

Please note you must have TACS access prior to requesting eRMS access.

Is eRMS Lead Clerk training available now?

Yes. Training can be found in the My Learning library in HERO under the following:
Course Name: Enterprise Resource Management System (eRMS) Lead Clerk Role Training

Course #: 2024 ODEV6504CR06

How do I sign up for eRMS training?

Supervisors must assign the eRMS Lead Clerk training to employees with timekeeping duties as needed. If you believe this training should be assigned to you, please reach out to your immediate supervisor.

Is eRMS Lead Clerk training mandatory?

Yes. eRMS Lead Clerk training is required for Lead Clerks who perform timekeeping duties. eRMS Lead Clerk training is a prerequisite for access to eRMS via ARIS.

How long is the eRMS Lead Clerk training?

eRMS Lead Clerk training is approximately 80 minutes long.





I completed my eRMS Lead Clerk training and have eRMS access, now what?

You may now enter supervisor approved leave in eRMS as directed by your manager or supervisor. You may also generate an Incidental Leave Entry Report.

What capabilities are available to me with the new eRMS Lead Clerk user role profile?

eRMS Lead Clerk access will be limited to the following:

- **Leave Management** - where you can enter supervisor approved leave or edit and remove previous leave entries.
- **Call-In Log Reports** - where you can access the Incidental Leave Entry Report.

Lead Clerks will **not** be able to view leave balances or access the Employee Information portion of the Leave Management section.

Can I still enter leave into TACS?

After September 18th, leave entry will be disabled in TACS and recorded exclusively within the eRMS platform.





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.



Katherine S. Attridge
Vice President
Labor Relations



Angela H. Curtis
Vice President
Retail and Post Office Operations



Mike L. Barber
Vice President
Processing and Maintenance
Operations



Cara M. Greene
Vice President
Controller

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
	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: * 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.	