

## Supervisor Workload Credit Auto-Worksheet United States Postal Services

The Supervisory Workload Credit system is used to determine the number of Supervisors, Customer Service EAS-17 that are to be authorized in post offices and carrier stations. SWCs are workload driven. It identifies and measures the workload of supervisors. The primary measure used is the number and type of employees supervised.

SWCs are measured on a facility-by-facility basis, and each post office and carrier station is calculated separately. The calculation of employee SWCs includes only those employees on the rolls of the post office or carrier station. Custodial and maintenance employees on the rolls of a plant that are domiciled in a post office or carrier station are not included in the SWC calculation. Administrative employees on the rolls of the district office domiciled in a post office or carrier station are not to be included in the SWC calculation.

SWC calculations are to include on rolls CCA’s, PSEs, MHAs and Casuals, assuming that a temporary employee is occupying a position authorized to be filled. Vacant positions that are authorized to be filled should also be included in SWC calculation, if they are not covered by CCAs, TEs, PSEs and Casuals.

SWC calculations are performed on a SWC Auto Worksheet. The following ranges determine the number of supervisors authorized:

POST OFFICE and STATION SWCs	SUPERVISORS AUTHORIZED
18.50 – 50.49	1
50.50 – 85.49	2
85.50 – 123.49	3
123.50 – 163.49	4
163.50 – 203.49	5
203.50 – 243.49	6
243.50 -- 283.49	7
283.50 -- 323.49 *	8

NOTE: \* Each additional 40 SWCs = 1 additional supervisor

The SWC Automated Worksheet does not change any existing HQ approved processes. This document explains the source and types of data that are automatically populated, and explains how to use the SWC Automated Worksheet. The book is protected however, can be unprotected without a password. (To unprotect, select Tools, Protection and Unprotect sheet.)

The SWC Auto Worksheet is an enhanced version of the original worksheet. It is engineered to have as much data as possible available from our National systems. **It is the user’s responsibility to ensure that the populated data is correct. If local knowledge supersedes what is in the data system, it is user’s responsibility to make corrections if needed before the submission.**

**DO NOT CALL 1-800-USPS-HELp** for support. The Help Desk does not support the SWC Auto Worksheet. For technical support with spreadsheet functionality and to report spreadsheet problems, please contact Seungtaek Kim, FSS, via email [seungtaek.kim@usps.gov](mailto:seungtaek.kim@usps.gov). For help regarding the SWCs worksheet process, please contact your District or Area Coordinator.

## I. Requirements

- User must have webCOINS access.
- User must be connected to the Postal network via LAN or USPS VPN.

## II. Getting and Using the Auto-Worksheet

- Go to FSS website. (Click the link here [SWCs Auto Worksheet](#), or follow these steps: from <http://blue.usps.gov> go to “Inside USPS” then < Human Resources < Executive Direct Reports (it is at the right side bottom corner under About HR) < Operation Complement Management (it is under Complement Staffing and Field Policy) < Tools < Automated SWCs < click SWC Auto Worksheet zip file.)
- The file on the web is in zipped format.
  - Be sure to extract and then open the model from your “My Document” or local hard drive
  - **Do not** open by double clicking from within WinZip or extract to your “Desktop”
  - **Do not** have more than one model open when getting webCOINS data.
- Enable Macros when opening file. For ACE3, click Enable Contents button in the yellow strip at the top of the spread sheet.
- Read pop-up Splash Page and follow any instructions if necessary; close Splash Page.

## III. Getting webCOINS Data

- Open webCOINS program: <http://webCOINS>
- Accept the standard warning message.
- Enter your webCOINS user logon and password.
- Users will be taken to the webCOINS Splash. Go to 'Reports' from the top menu or 'Summary Reports and Charts' from the webCOINS homepage, and select report cr032 'HR Worksheets Data'.

- Select the desired Cluster, multiple Offices (hold ctrl key) or a single Office (depending on user’s level of webCOINS access) and press the "Execute" button.
- Click "Open" file when prompted. The report will open in Internet Explorer's Excel HTML format.
- Go back to SWC Auto Worksheet Excel Spread sheet, and select the 2<sup>nd</sup> tab, “SWC Worksheet” tab. Click the "Copy cr032 data” button on the top.
- A message box appears, “WebCOINS data successfully loaded”. Click OK.

**IV. Office Menu**

- Select the Office/Station for which you are doing a SWC.
- The drop-down list includes all Offices/Stations that have an OnRolls or Authorized Supervisor Customer Service position and all offices of level EAS 20, 21, and 22.

**V. Employee Credits**

Withheld/Vacant Authorized positions that are not encumbered or not being covered by a Casual, CCA, or PSE – User must input.

The On Rolls counts that are auto populated in a), c), f), g), h), i), and j) described below are from webCOINS. These counts include Casuals, MHA’s, CCA’s and PSE’s but do not include vacancies. It is proper to also include authorized vacancies (withheld or residual) that are not encumbered or being covered by a Casual, MHA, CCA or PSE. Do not fill in the blue box if the withheld/vacant positions are covered by a Casual, MHA, CCA or PSE because Casuals, CCAs and PSEs are already included in the populated counts. Do not fill in vacancies of Rural Carriers. Rural routes (regular, vacant and auxiliary) are counted as rural carriers. Rural PTF carriers are also included in rural counts.

To facilitate the entry of authorized vacant positions, use the blue shaded area:

Withheld/Vacant Authorized	
Craft	Job Number
CARRIER	012345678
CLERK	55544440

As you select the craft, the appropriate on rolls complement in a), c), f), g), h), i), or j) will automatically increase by one for each entry. Complete Job Number manually for documentation. **Do not** claim credit for abolished, reverted or stale vacant jobs.

There are rows for seven entries; if you have more than seven you will need to hard key the appropriate employee credit in a), c), f), g), h), i), or j) with the total complement number and then use the comments section at the bottom to document.

- a) City Carrier – populates a count of on-rolls of career and CCA City Carriers. It counts all Carriers (craft) on rolls and properly excludes LDC 67 & LDC 33. The credit is count x 1.4.
- b) Rural Carrier – populates a count of regular and auxiliary routes based on eFlash data, plus number of PTF (Des/Act 760) rural carriers. PTF data is available in Columns AC through AF. The number of routes includes vacant route(s). Therefore, any withheld/vacant positions do not need to be added. The credit is count x 1.25.
- c) VOMA – populated a count of on-rolls LDC 33. The credit is count x 1.0.
- d) Window Clerk at the finance number selected for SWC – The total Distribution clerk (item f) will be reduced by the number in this cell. Effective November 2012, the business rule in counting window clerk is to count any clerks whose job title contains ‘window’ or ‘sales’. There are 18 occupation codes for this. The cell is automatically populated with the counts of 18 occupation codes from the downloaded cr032 data. The credit is count x 1-1/3. Below are the 18 occupation codes used in counting: (LDC 67 is excluded)

**Current Listing of Window Titled Clerk jobs  
included in 1.33 calculation**

<b>Occ-Code</b>	<b>Job Title</b>
2340-80XX	DISTRIBUTION WINDOW & MARK UP CLK
2340-48XX	SELF SERVICE POSTAL CENTER TECH
2340-04XX	POST OFFICE CLK
2340-02XX	DIST WINDOW CLK
2320-39XX	RETAIL SALES CLK POSTAL STORES
2320-29XX	WINDOW SVC TECH
2320-05XX	CLERK FINANCE ST
2320-01XX	WINDOW CLK
2320-0007	DELIVERY/SALES & SERVICES DIST ASSOC
2340-0026	DIST WINDOW CLK
2340-0025	DIST WINDOW CLK
2340-0024	DIST WINDOW CLK
2340-0022	WINDOW CLK
2320-0004	LEAD SALES & SERVICES ASSOCIATE
2320-0003	SALES, SVCS/DISTRIBUTION ASSOC
2320-0001	SALES AND SERVICES ASSOCIATE
2320-0009	LEAD SALES & SERVICES ASSOCIATE
2395-0017	PSE SALES & SVCS/DISTRIBUTION ASSO

- e) Window Clerk domiciled in finance stations without resident supervisor – The cell is automatically populated with the counts of 18 occupation codes from the downloaded cr032 data for the finance stations. The credit is count x 1-1/3.

You must fill in the green shaded box. Out side of the Form to the right, a reference box in green in Column Q is available for user’s reference. It displays a list of finance stations with no resident Supervisor, based on the survey conducted in May, FY 2010. However, it is possible that the list appears to be inaccurate or does not reflect the most recent changes. If there are any changes made in finance number where the retail unit reports, it must be reported to [seungtaek.kim@usps.gov](mailto:seungtaek.kim@usps.gov) for an update.

The Retail, City Carriers, Rural Carriers, and Other Clerk columns are automatically populated. The count of retail clerks are count of clerks whose job title includes window or sales, with 18 occupation codes. If the populated count is inaccurate, the correct number should be typed. Item e displays the number in the Subtotal of green box for Retail. The total Distribution clerk (item f) will not be reduced by the number in item e.

FINANCE STATIONS WITH NO RESIDING SUPERVISOR				
Finance Stations w/Finance Number	Retail+F8PSE	City Carriers	Rural Carriers	Other Clks
125497 MAC-MAIN OFFICE STA	7	0	0	7
	0	0	0	0
	0	0	0	0
	0	0	0	0

**Click here and read Note:**

Finance Unit Names:

125497 MAC-MAIN OFFICE STA

- 2) If the finance unit does not have its own finance number, the counts are already included in item d and e. No action is needed.
- 3) If the office selected for SWC is an Administrative Post Office (APO), then its Remotely Managed Post Office (RMPO) should be listed in Col K. As RMPOs are mapped to their Administrative POs, all bargaining unit employees will receive credit in the SWC following existing business rules. RMPOs are available in the drop-down choices in Col K (green box). Upon the selection of RMPO, Retail, City Carriers, Rural Carriers and Other Clerks columns will be populated with on-roll counts.

4)

FINANCE STATIONS WITH NO RESIDING SUPERVISOR				
Finance Stations w/Finance Number	Retail+F8PSE	City Carriers	Rural Carriers	Other Clks
251240 BRITTON PO	1	0	4	0
259260 TIPTON PO	1	0	3	0
	0	0	0	0
	0	0	0	0

**Click here and read Note:**

Finance Unit Names:

251240 BRITTON PO
259260 TIPTON PO

- f) Distribution Clerk – populates a count of on-rolls Function 4 Clerks including PSEs, but excluding LDC 49 CFS clerks. This number is reduced by the number of window clerks at the office (finance number) selected for SWC. If the Station has a number other than zero in Item j, Accounting, time & attendance, bulk mail, and secretarial, then this number is also reduced by the number in Item j. The credit is count x 1.0.
- g) Mail Handler – populates a count of on-rolls Function 4 Mail Handlers (MHA is included). The credit is count x 1.0.
- h) Custodial – populates a count of on-rolls whose title contains “Custodial” or “Cleaner” and also counts casuals. If a Station or Lead Finance that the selected finance number belongs to has an authorized maintenance supervisor position, then this item is populated with zero. The credit is count x 0.75. Note: The credit was increased from 0.5 to 0.75 effective November, 2012.
- i) Maintenance – populates a count of on-rolls bargaining unit Maintenance minus Item h, Custodial. If a Station or Lead Finance selected for SWC has an authorized maintenance supervisor position, then this item is populated with zero. The credit is count x 1.0.
- j) Accounting, time & attendance, bulk mail, and secretarial – populates a count of on-rolls LDC 79. If these LDC 79 employees are District craft employees or the office is staffed with a Supervisor Customer Service Support, then, LDC 79 count is zero. The credit is count x 1.0.

**V. Non-Employee Credits**

- k) through m) – populates a count of HCR routes based on IMAQ data

Number of administrative highway contract routes			
k) with 100-299 box deliveries	0	x 1/3	0.00
l) with 300-399 box deliveries	0	x 2/3	0.00
m) with 400 or more deliveries	0	x 1	0

- n) Contract Stations and Community PO’s – populates a count of CPU based on Contract Postal Unit Technology reports at <http://cput>. To see a list of CPU names, go to Column AH. The credit is count x 0.5.
- o) Contract custodians – User’s selection. If yes, select 1; if no, select 0. The credit for yes is 1/3.

**VI. Total SWCs**

- is sum of items (1) through (6) in the Form. The sum is truncated with two digits after the decimal point.

**VII. Zone of Tolerance**

- Business Rules of ZOT effective November, 2012: A date certain Zone of Tolerance will be established for loss of encumbered staffing to provide the losing office an opportunity to adjust craft complement and/or acclimate to reduced supervisor staffing. The twelve-month Zone of Tolerance period only applies to the lower side of SWC ranges and for encumbered positions only. All SWC’s changes resulting in increases to staffing are processed immediately following current business rules. A standardized approach with well defined business rules provides impacted offices and supervisory staff the time necessary to explore opportunities and adjust accordingly.
- 15% Zone of Tolerance applied to points required to earn SCS. Zone of Tolerance points range from 3 to 6. ZOT is applied to encumbered assignments only. At the end of 12 months, authorization is delimited and encumbered employee is impacted. If at any time during the 12-month ZOT, if the position is vacated, it should be delimited. Zone of Tolerance is tracked by FSS.

**RANGE IN SWC POINTS**

#SUPVs	ENTRY	NEXT	PTs to NEXT	15% ZOT
0	0	18.5	0	0
1	18.5	50.5	18.5	3
2	50.5	85.5	32	5
3	85.5	123.5	35	6
4	123.5	163.5	38	6
5	163.5	203.5	40	6
6	203.5	243.5	40	6
7	243.5	283.5	40	6
8	283.5	323.5	40	6
9	323.5	363.5	40	6
10	363.5	403.5	40	6

Formula = (PTs to NEXT X 15%) ~ Results Rounded UP

Example: 18.5 X 15% = 2.775 or **3**

**VIII. Prepared By** - Enter the preparer’s name.

**IX. Extra Positions**

An exception credit formula is applied to multi-station cities to provide additional SCS staffing based on number of earned SCS positions within the Installation. An additional SCS position is authorized at the Lead Finance level for every 35 currently earned SCS positions. This position is used at the discretion of the Installation Head

but it is expected that leave replacement will be primary. With the establishment of this staffing coupled with the Lead Clerk positions, higher level use should be reduced.

**Business Rules** – Based on earned SCS position totals at the Lead Installation level. For every 35 earned, Lead Finance office is authorized 1 additional SCS. Calculation rule is “Round Down”. Calculated is authorized and tracked by FSS.

**X. Information**

- The number of extra SCS authorized at the Lead Finance number is displayed
- The number of supervisors previously Authorized and current OnRolls are displayed at the bottom of the worksheet.
- The number of Supervisor Customer Service Support authorized is displayed.

Extra SCS Auth'd at Lead Fin >	0
Authorized Supv CS as of 12/3/12	0
Supv CS on roll as of today >	0
Supv CS <i>Support</i> authorized >	0

**VIII. Multiple Stations**

- If a Station is selected on the SWC WORKSHEET tab, you may create separate tabs for other Stations under the same Lead Finance Number by using the "Create tab(s) for Station(s) under the selected Lead Finance" button.

**IX. Export Completed Worksheet**

- Click the "Export this PO/Station" button or the "If multiple SWC tabs: Export all to one book" button as appropriate. After a short processing time, a new Excel file will be created with the desired worksheet. User will be prompted using the standard Excel "Save As" dialog with the default file name. This default "save as" name may be changed by the user. The default subdirectory to "save as" is the subdirectory from which this automated worksheet spreadsheet is opened from.

**X. Reset the Worksheet for New Office**

- Click the “Reset the worksheet for new office” button. It will erase all the manual inputs and restore the formulas for you to restart for a new office.



## XI. References

Reference about Employee Counts – How are employees counted for workload service credits? *HQ letter dated December 8, 1992*

*“Count employees who are active on-rolls. This includes career and non-career, i.e., casuals, (excluding Christmas casuals) and transitional employees. You may also count vacant positions which are authorized to be filled. However, you may not double count. Count either the vacancy or the casual or TE assigned to the vacant position... Do not count any employee more than once. The total number of weighted employees may not exceed the bargaining unit complement for the office.”*

Reference about Rural Carrier – *Postal Bulletin 21232 dated 2-14-80*

*“Include full-time and auxiliary carriers (or sub-rural carriers serving on vacant rural routes) but not substitutes (or substitutes of record). The number in this item should equal the number of regular and auxiliary rural routes at the main office.”*

Reference about CFS Clerk - *HQ letter dated December 8, 1992*

*“Computerized forwarding units (CFS) will report either to a Manager, Customer Service Operations, or where that position is not authorized, directly to a Postmaster.”*

**NOTES - Do *not* move the order of the tabs.**

Any imported webCOINS data is deleted when this book is closed for security reasons. All on-rolls data are from HCES cr032 of the current day download.

Data update frequencies:

- IMAQ data – monthly
- HCR data – monthly
- CPU data – monthly
- Office Menu – monthly

**As a reminder, DO NOT CALL 1-800-USPS-HELp** for support as they do not support this spreadsheet.