

May 22, 2024

RECEIVED MAY 2 4 2024

Mr. Ivan Butts President National Association of Postal Supervisors 1727 King Street, Suite 400 Alexandria, VA 22314-2753

Dear Ivan:

As a matter of information, the Postal Service is establishing an *Enterprise Resource Management System* (eRMS) training for Lead Clerks to perform their assigned leave entry responsibilities.

The course will be available in a web-based training (WBT) directly through the Postal Service's learning portal (HERO).

The eRMS Lead Clerk course provides an overview on entering, editing, and removing leave as directed by supervisors.

The enclosed compact disc contains an electronic copy of 6504 eRMS Lead Clerk Course.

Please contact Lindsey A. Butler at extension 7194 if you have any questions concerning this matter.

Sincerely

Bruce A. Nicholson

Director

Labor Relations Policies and Programs

Enclosure

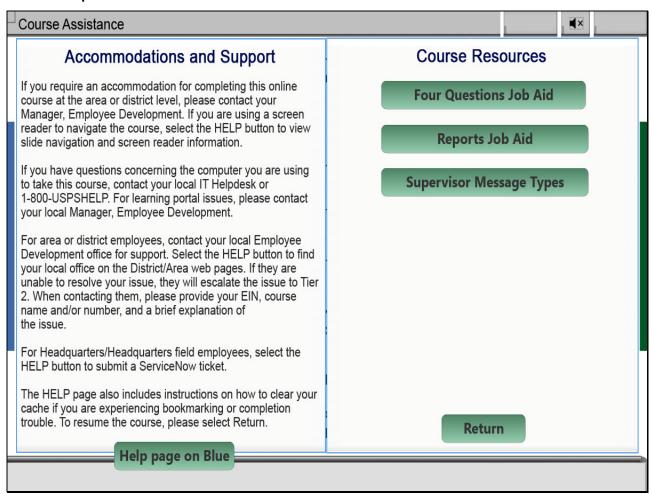
Slide 1 - Title



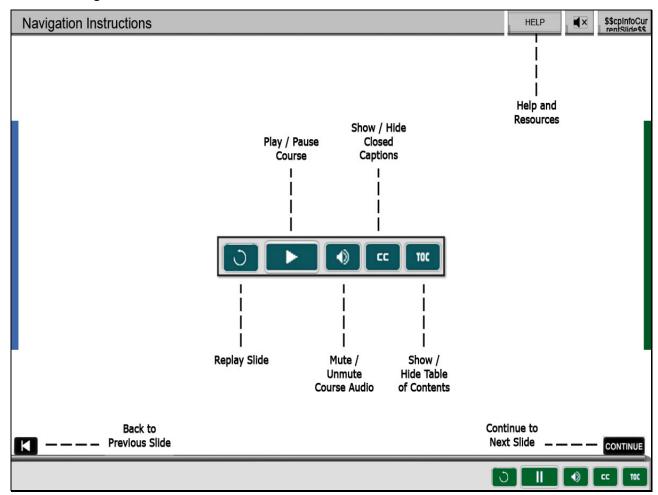
Welcome to Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 1: Valid Leave Requests.

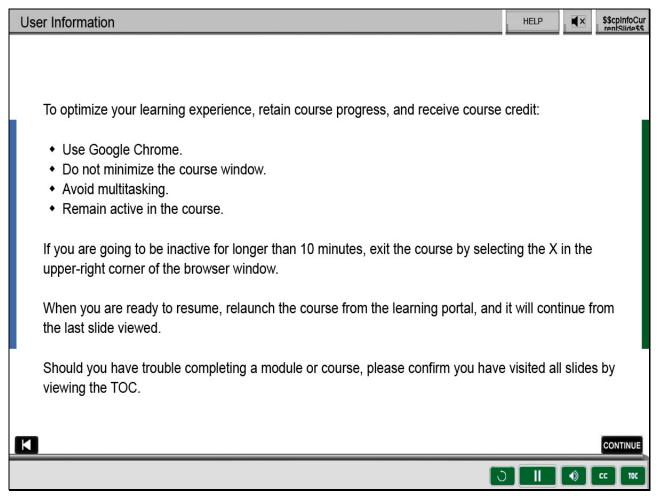
Slide 2 - Help



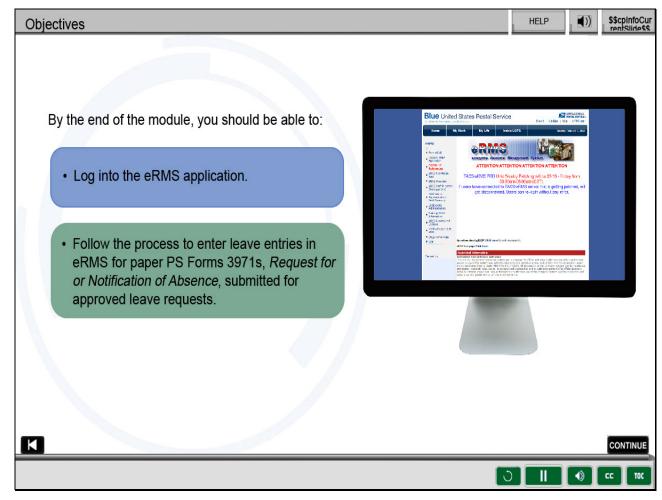
Slide 3 - Navigation Instructions



Slide 4 - User Information



Slide 5 - Objectives



Slide notes

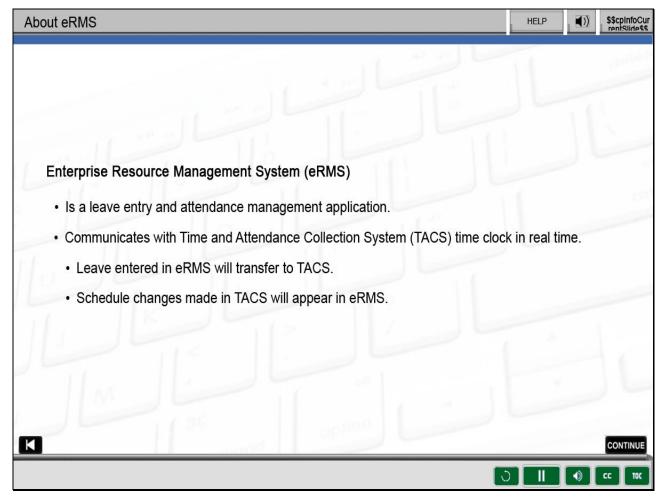
By the end of this module, you should be able to log into the eRMS application,

follow the process to enter leave entries in eRMS for paper PS Forms 3971s,

Request for or Notification of Absence, submitted for approved leave requests.

This module will discuss single-day entries.

Slide 6 - About eRMS



Slide notes

Enterprise Resource Management System (eRMS) is a leave entry and attendance management application.

Attendance issues as unscheduled absences affect almost every aspect of the Postal Service.

Entering leave properly in eRMS is necessary for effective attendance management.

It will save you time and benefit the Postal Service financially.

eRMS provides a variety of reports to assist in managing attendance.

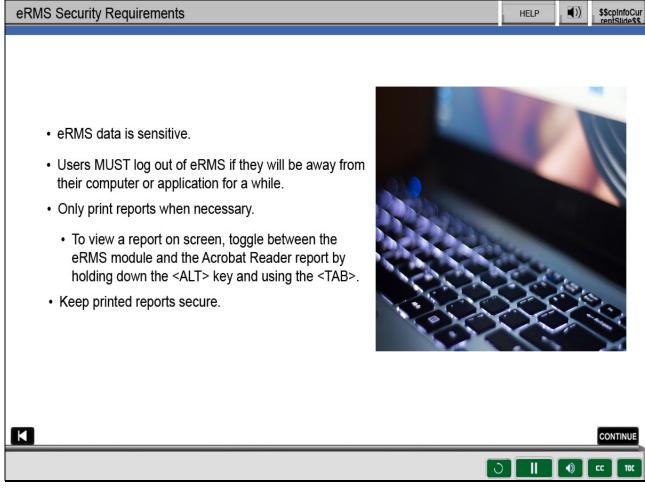
eRMS and Time and Attendance Collection System (TACS) communicate with each other in near real time.

Leave entered in eRMS for all time clock offices will transfer to TACS.

Schedule changes entered in TACS will appear in eRMS.

Time card offices need to ensure leave entries are made in a timely manner in both applications.

Slide 7 - eRMS Security Requirements



Slide notes

eRMS data is sensitive. Every effort must be made to safeguard eRMS access and information.

It is mandatory that all users log out of the eRMS application when not using it or if called away from the computer.

As much as possible, avoid printing hardcopy reports.

If you run a report and wish to refer to it onscreen, you can toggle back and forth

between the eRMS module and the Acrobat Reader report by holding down

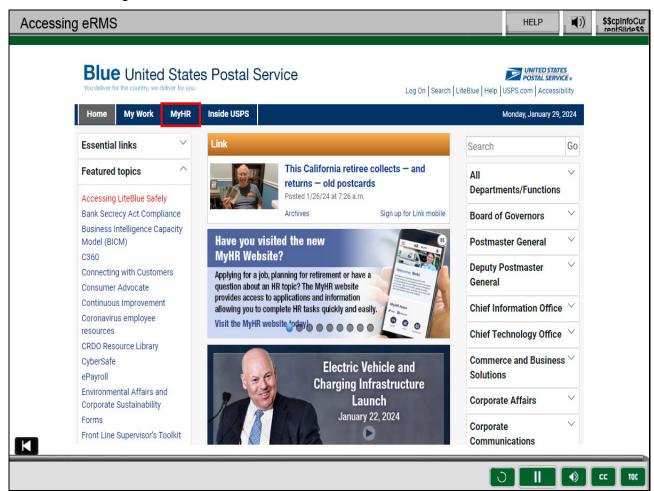
the Alt key and the Tab key to move from icon to icon.

When you print reports,

make certain you keep them secure.

Do not leave them at the printer. Shred them prior to discarding.

Slide 8 - Accessing eRMS



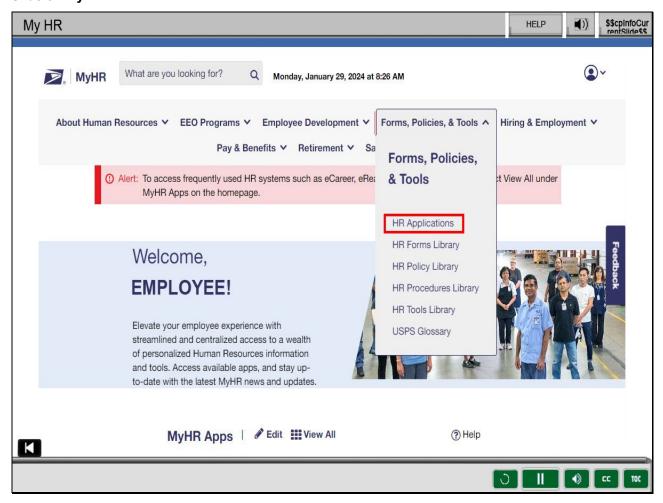
As a lead clerk, you may be tasked with entering

supervisor-approved leave as part of your job duties.

To log into eRMS, the system of record for all leave entries,

go to the "MyHR" tab on the Blue USPS page.

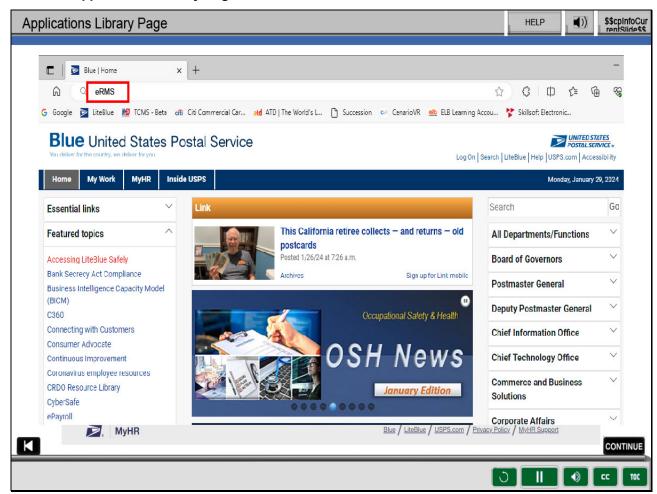
Slide 9 - My HR



Slide notes

From the MyHR screen, select "Forms, Policies, & Tools," then select "HR Applications" from the drop-down.

Slide 10 - Applications Library Page



Slide notes

From this screen, use the radio buttons to filter the Category by "Pay & Benefits"

and the Access Type by "Blue Only."

This will minimize the options to search through.

Select the "Visit" link for "Enterprise Resource Management System (eRMS)."

This will take you to the eRMS Home page.

For faster access in the future, select the star icon next to favorites to add it

to your MyHR Apps on the MyHR Home screen.

Note: Another option for accessing the eRMS Home page is to type "e-R-M-S"

in the address bar of the Blue Page, then select "Enter" on your keyboard.

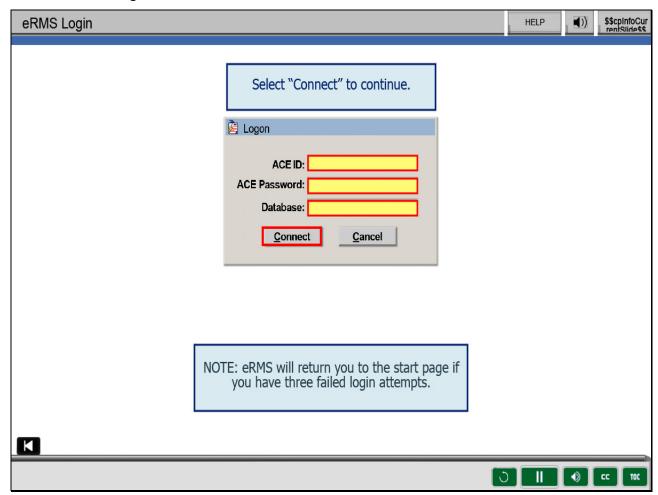
Slide 11 - Start eRMS Link



Slide notes

Select "Start eRMS" link located on the left side of the eRMS webpage.

Slide 12 - eRMS Login



Slide notes

Enter your ACE ID into the first field on the screen and tab to enter your ACE password.

Tab to enter the database name.

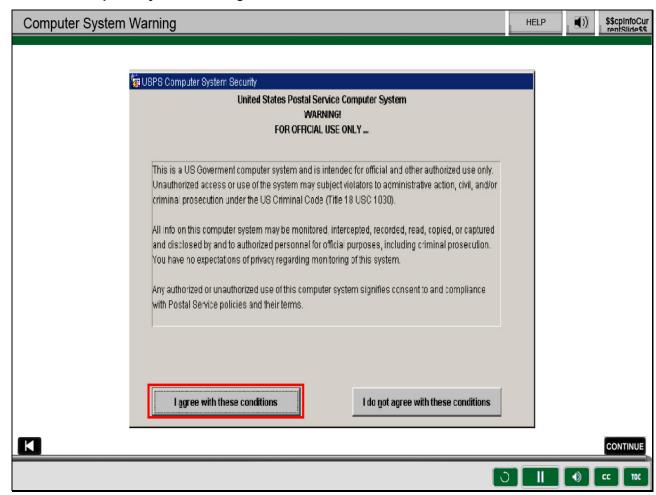
Note: The eRMS database field is e-r-m-s number-number.

The numbers are the same numbers you use to log into TACS.

Also note that eRMS will return you to the start page if you have three failed login attempts.

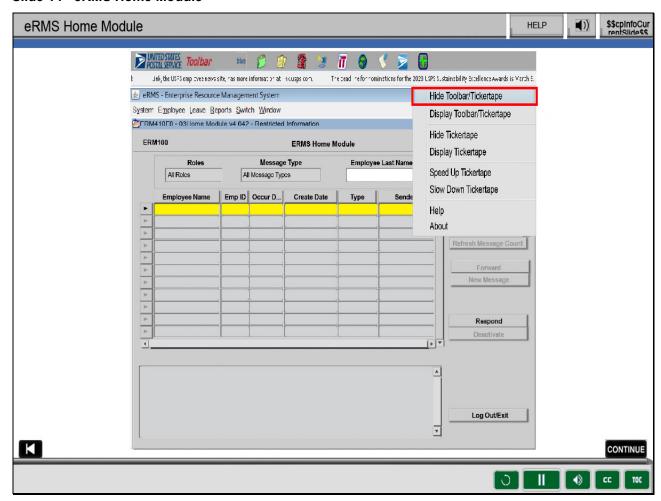
Select "Connect."

Slide 13 - Computer System Warning



To continue, you must agree with the conditions stated on the USPS Computer Security Warning.

Slide 14 - eRMS Home Module



The Home Module appears every time you log into eRMS

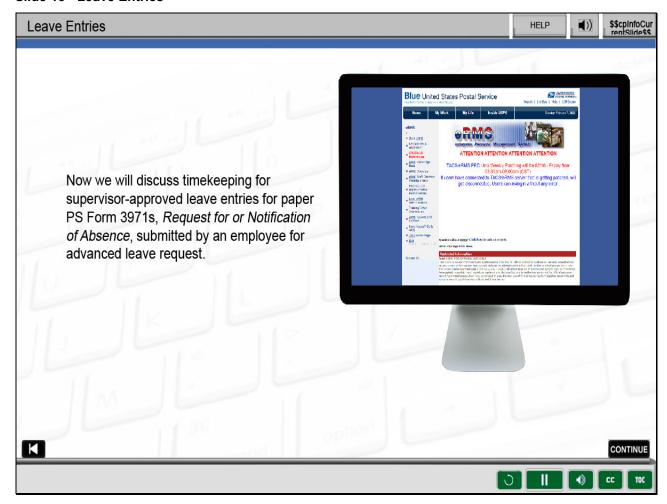
and each time you switch to eRMS from TACS.

If the ACE tickertape is scrolling across the top of your computer screen

when you log into eRMS, it will interfere with your ability to access the drop-down menus.

To hide the tickertape, right-click on it, and select "Hide Toolbar Tickertape."

Slide 15 - Leave Entries

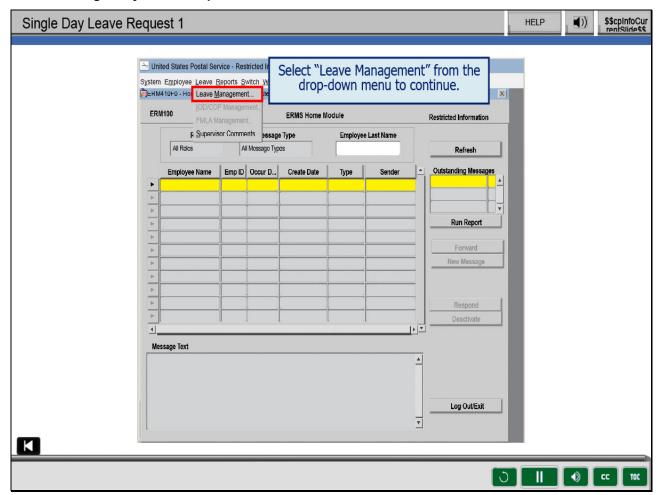


Slide notes

Now we will discuss timekeeping for supervisor-approved leave entries for paper PS Form 3971s,

Request for or Notification of Absence, submitted by an employee for advanced leave request.

Slide 16 - Single Day Leave Request 1

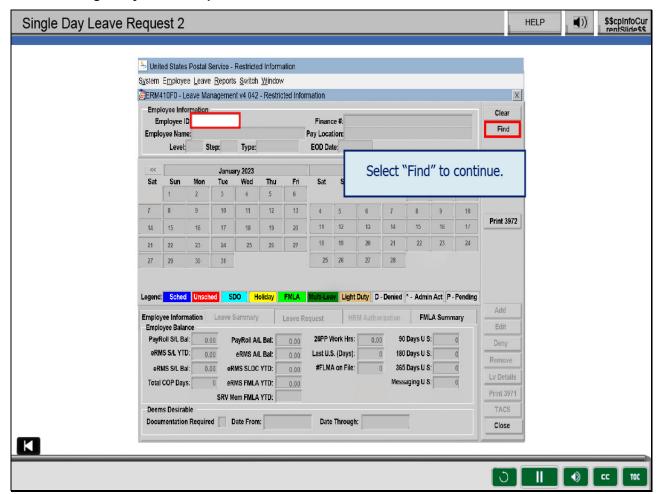


On 02/02/2023 at 0800, your supervisor gave you an approved leave slip for

Tom Smith for 8 hours of Annual Leave (AL) for 02/23/2023.

From the Leave drop-down menu, choose "Leave Management."

Slide 17 - Single Day Leave Request 2

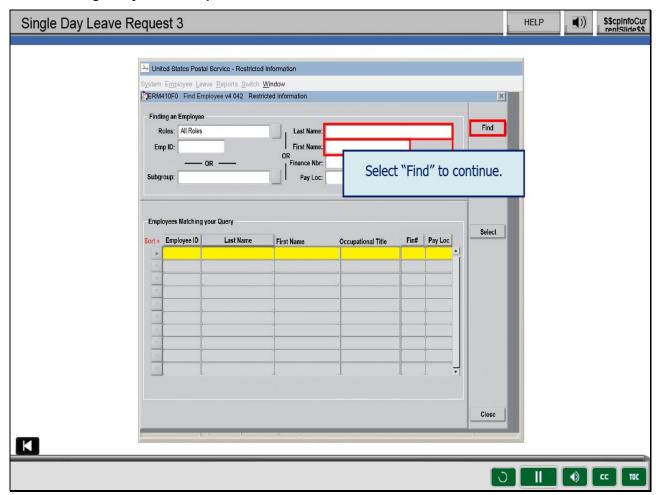


You could enter the Employee Identification Number (EIN) and hit Enter,

but Tom's EIN is wrong on his PS 3971. In this case, use the Find function.

To use the Find function, select the "Find" button.

Slide 18 - Single Day Leave Request 3



Enter the employee's last name and first name, or any portion of either one.

Using the Find function is a good instance of less is more.

Try entering only the first three letters of the last and first name,

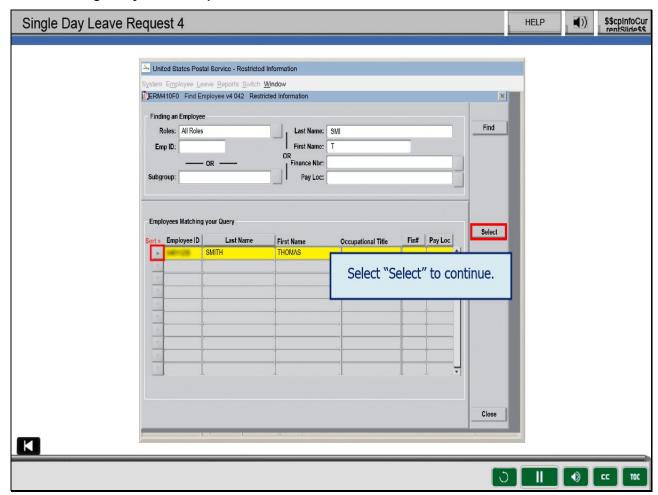
and let the computer find the full name.

In this case, enter "S-M-I" for Smith and "T" for Thomas.

Note: If you enter "T-O-M," the system will not find "Thomas."

Select "Find."

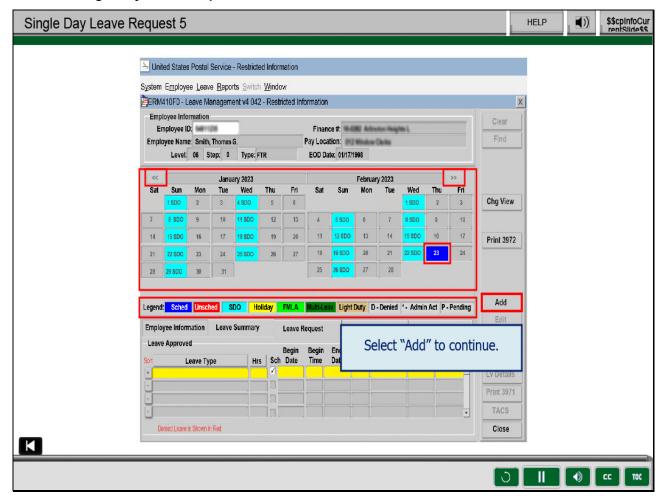
Slide 19 - Single Day Leave Request 4



To highlight the row, select the carat in front of the row with Thomas's EIN and name.

Once the employee, Thomas Smith, is highlighted, select the "Select" button.

Slide 20 - Single Day Leave Request 5



You will be returned to the Leave Management screen populated with Tom's leave history.

The calendar displays two months: the current month and the previous month.

You can view additional months by clicking the double arrow button located

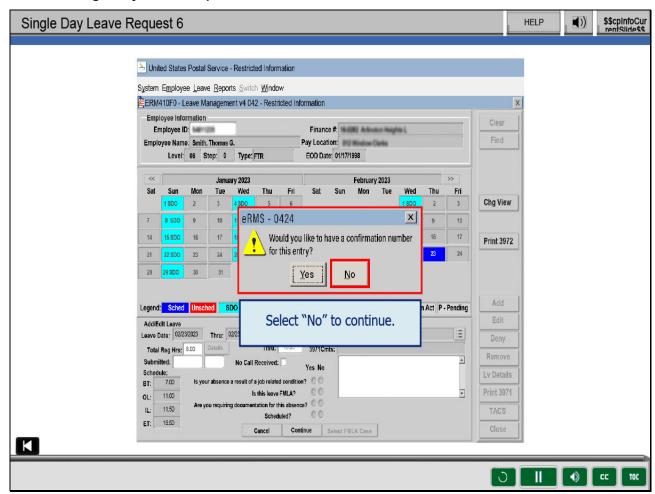
on each side of the calendar screen.

This allows you to review prior months and future months.

Note: All leave is color-coded and/or notated according to the legend below the calendar.

Select the date 02/23/2023 on the calendar and select the "Add" button.

Slide 21 - Single Day Leave Request 6



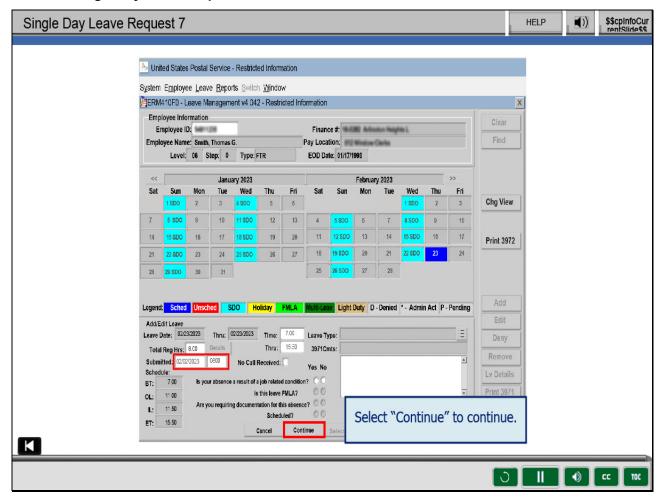
A pop-up message will display, "Would you like to have a confirmation number for this entry?"

Select "Yes" or "No" appropriately, but remember that if you select "Yes,"

an email will be sent to anyone with the supervisor role for Tom's pay location.

Select the "No" button to continue.

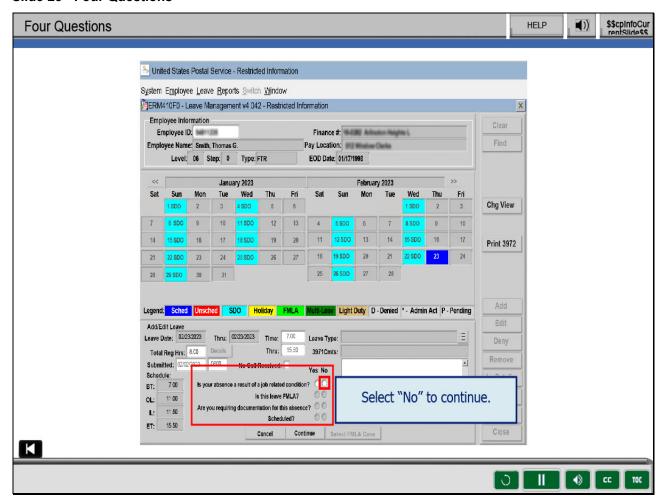
Slide 22 - Single Day Leave Request 7



Enter Submitted date and time, 02/02/2023 at 0800.

Select "Continue."

Slide 23 - Four Questions



Slide notes

Now you will need to answer four questions in the order they appear.

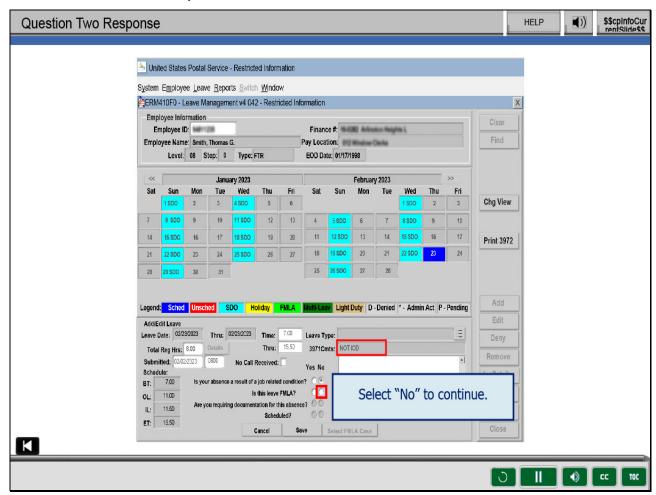
Select the "Yes" or "No" radio buttons.

Refer to the Four Questions Job Aid on the Help page for more information.

Select the "No" button to answer the first question,

"Is your absence a result of a job-related condition?"

Slide 24 - Question Two Response

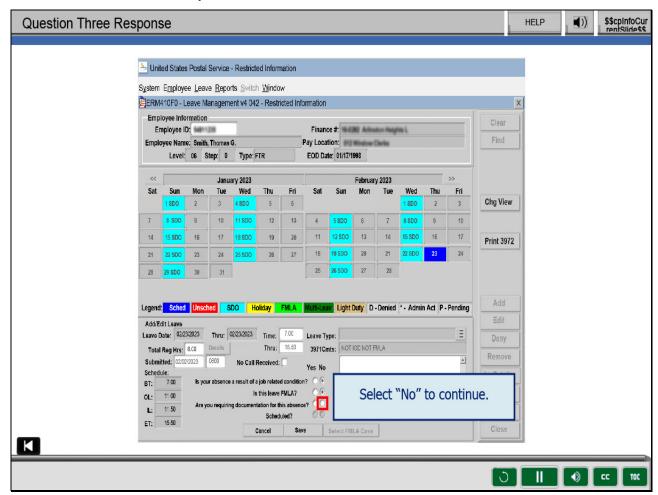


As you answer the four questions, notice that the PS 3971

comments box is updated automatically to reflect the responses.

Select "No" to answer the second question, "Is this leave FMLA?"

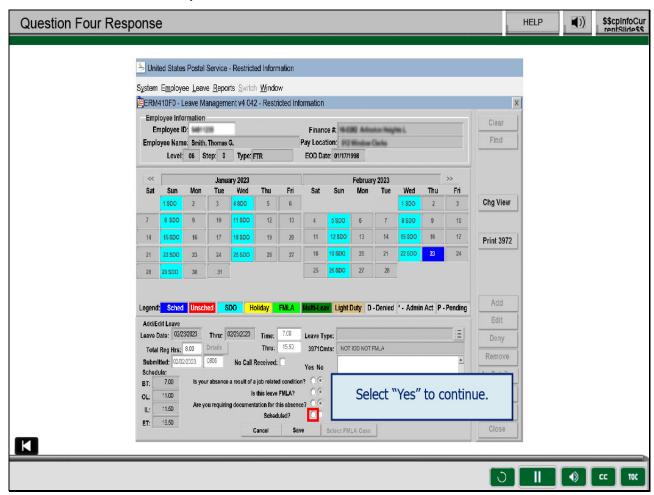
Slide 25 - Question Three Response



Select "No" to answer the third question,

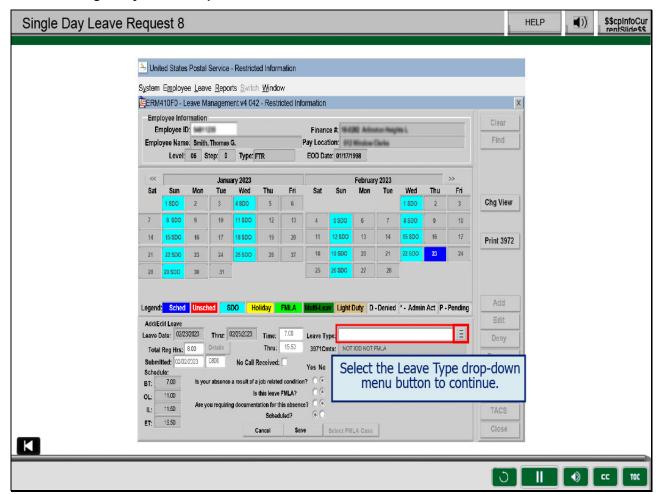
"Are you requesting documentation for this absence?"

Slide 26 - Question Four Response



Select "Yes" to answer the fourth question, "Scheduled?"

Slide 27 - Single Day Leave Request 8



When you answer "Yes" to the last question, "Scheduled?"

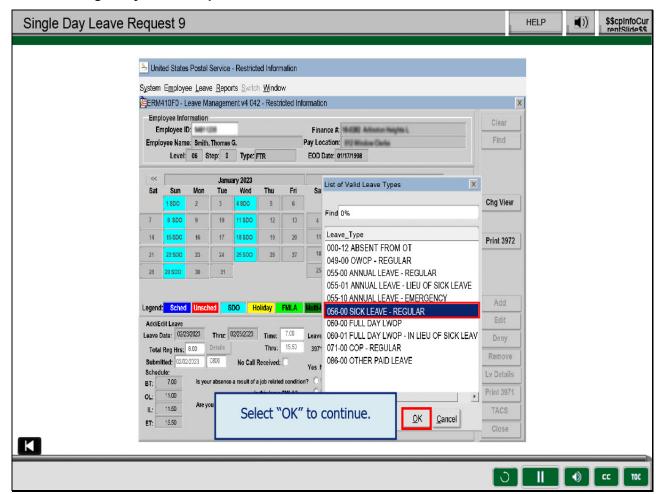
the "Leave Type" drop-down menu becomes available.

Select the button to the right of the Leave Type field,

and a list of leave types appears derived from your responses

to the questions and the employee's leave balance.

Slide 28 - Single Day Leave Request 9



If the employee does not have sufficient leave balances to cover the request,

the Leave Type associated with the insufficient leave balance will not be displayed.

However, the eRMS application has been designed to accommodate an

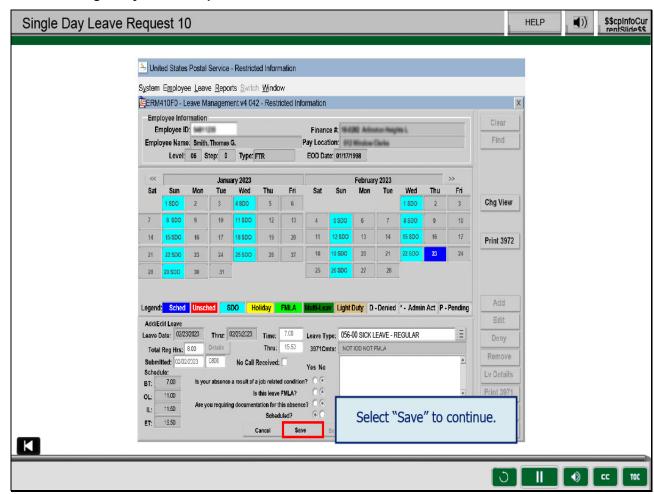
employee who has requested and been granted Advanced Sick Leave.

Even if the employee does not have a sufficient sick leave balance,

sick leave will be displayed as a leave option.

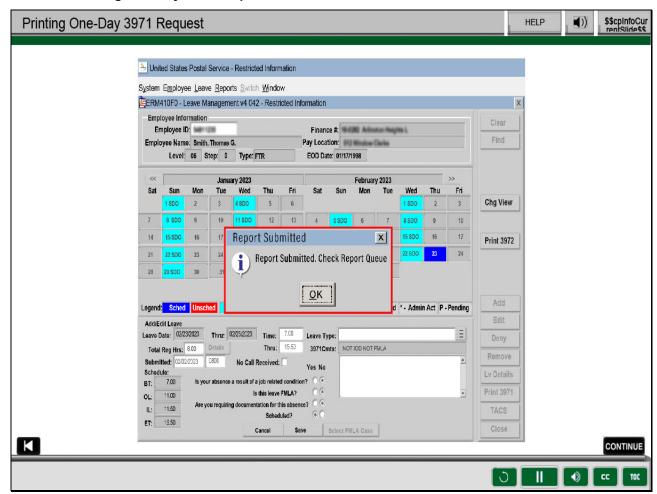
Select "OK."

Slide 29 - Single Day Leave Request 10



Select "Save."

Slide 30 - Printing One-Day 3971 Request



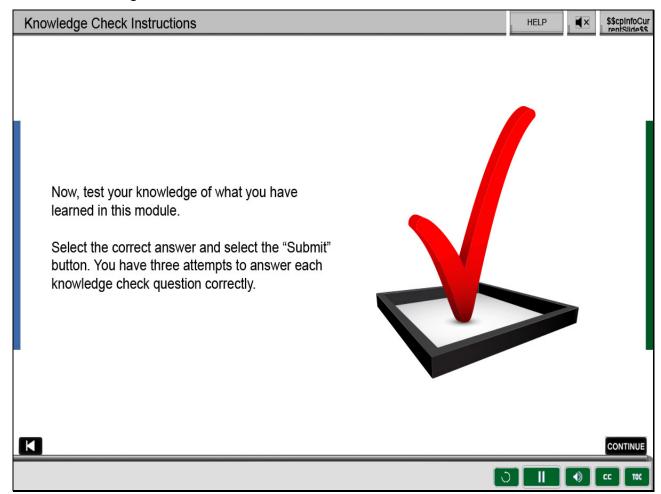
A pop-up will display, "Report Submitted. Check Report Queue."

If the PS 3971 provided by the employee is sufficient, you will not need to print another one.

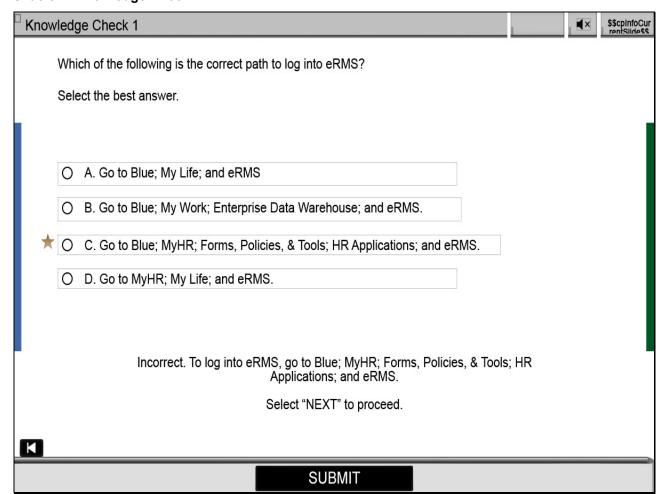
If you do not have a sufficient or accurate 3971,

proceed to the Report Queue to print the 3971 that was generated based on your entries.

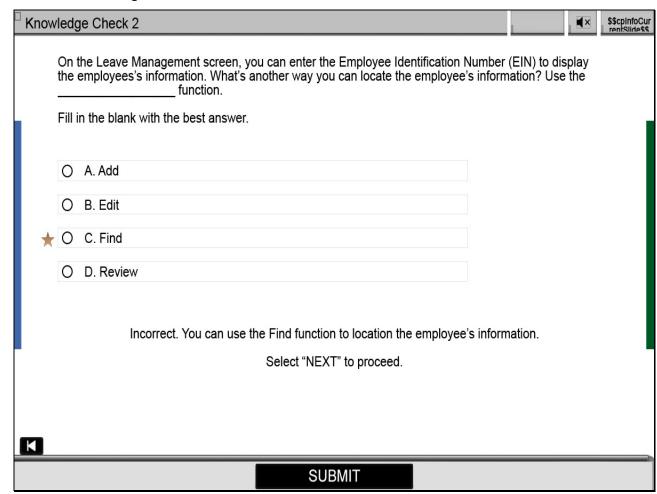
Slide 31 - Knowledge Check Instructions



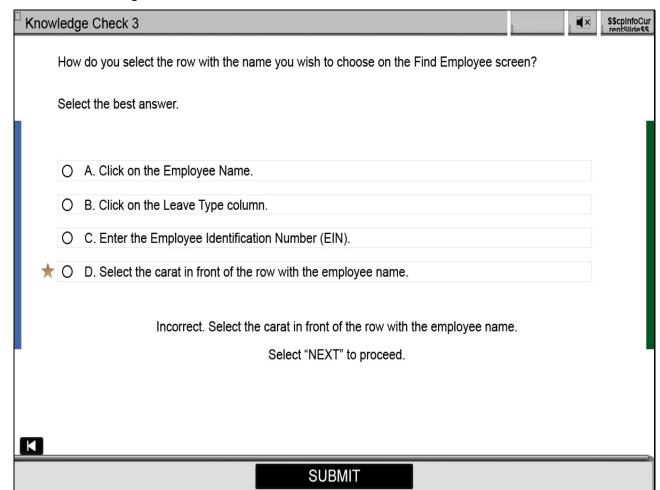
Slide 32 - Knowledge Check 1



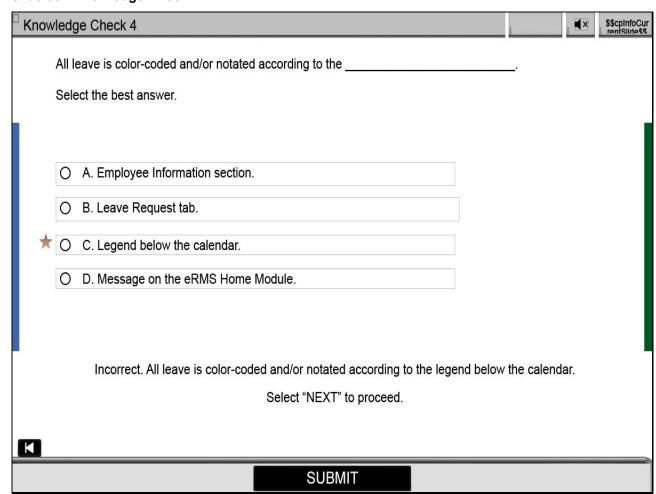
Slide 33 - Knowledge Check 2



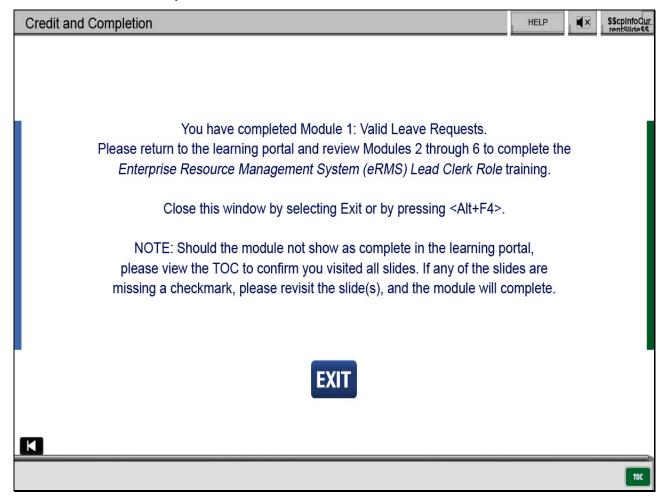
Slide 34 - Knowledge Check 3



Slide 35 - Knowledge Check 4



Slide 36 - Credit and Completion



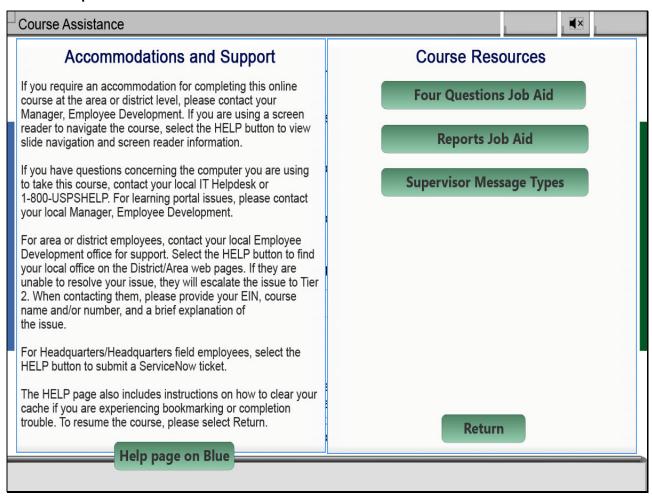
Slide 1 - Title



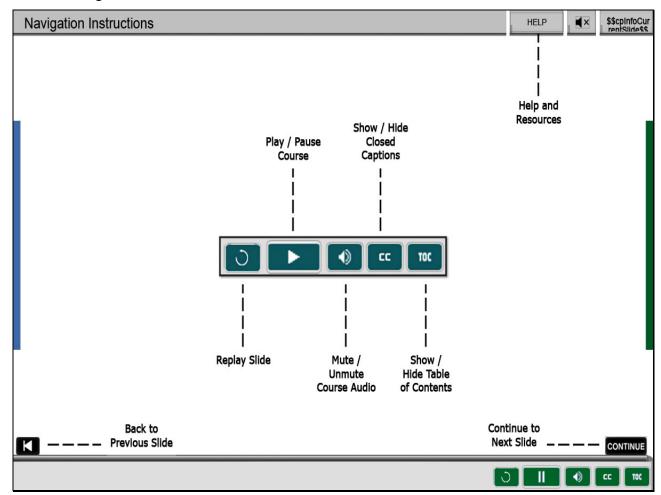
Welcome to Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 2, Leave Entries.

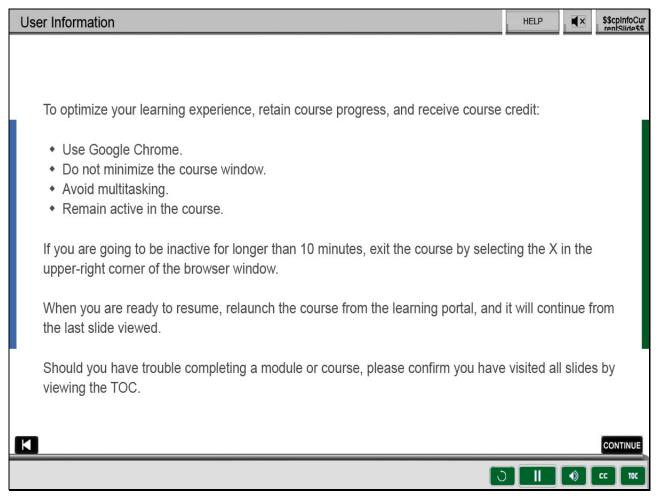
Slide 2 - Help



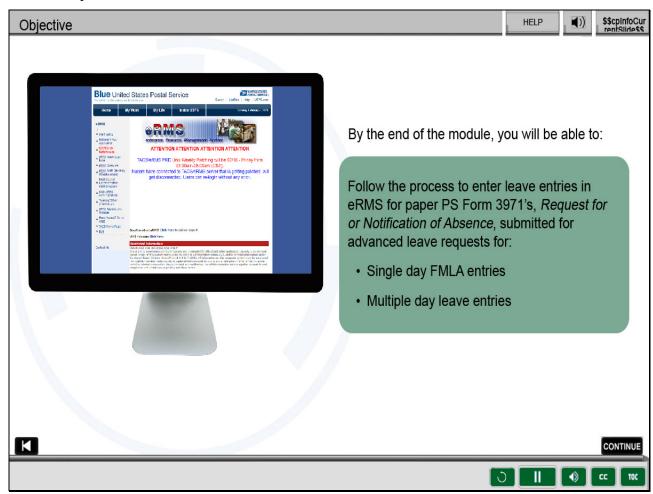
Slide 3 - Navigation Instructions



Slide 4 - User Information



Slide 5 - Objective



Slide notes

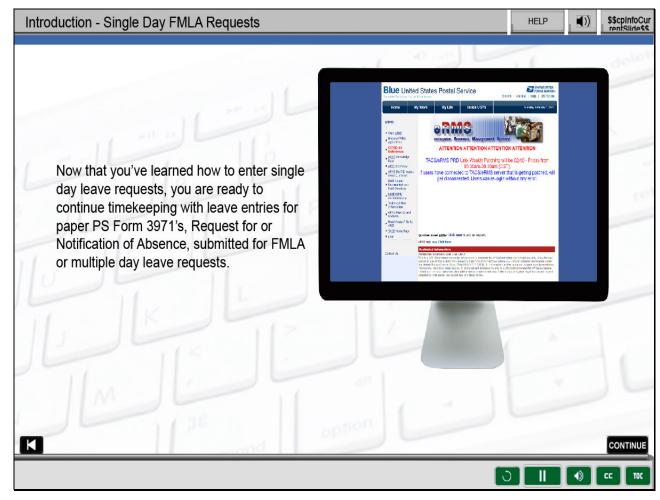
Upon completion of this module, you will be able to follow the process

to enter leave entries in eRMS for paper PS Form 3971's,

Request for or Notification of Absence, submitted for advanced leave requests

for FMLA entries and multiple day leave entries.

Slide 6 - Introduction - Single Day FMLA Requests

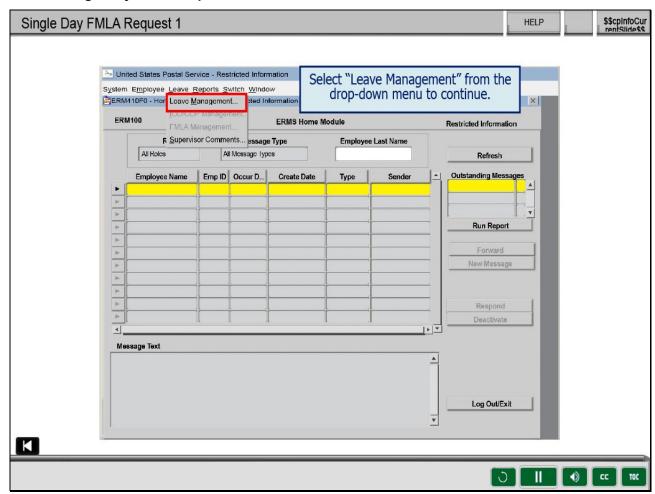


Now that you've learned how to enter single day leave requests,

you are ready to continue timekeeping with leave entries for paper PS Form 3971's,

Request for or Notification of Absence, submitted for FMLA or multiple day leave requests.

Slide 7 - Single Day FMLA Request 1

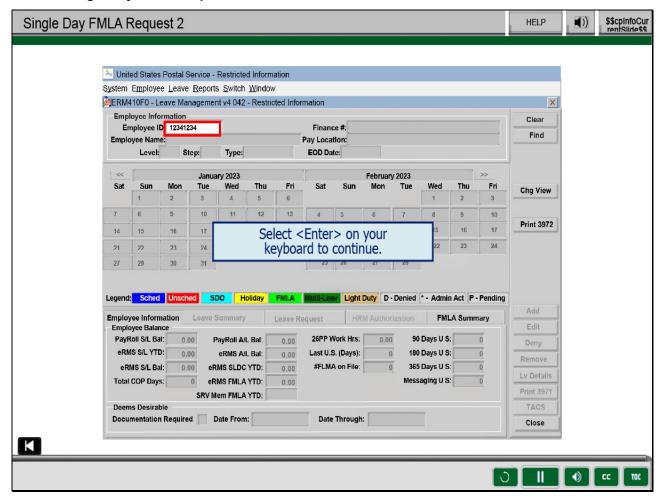


At 0800 on February 1st, 2023, Jalyn submitted a PS 3971

requesting eight hours of FMLA protected Sick Leave for February 24th, 2023.

Select "Leave Management" from the "Leave" drop-down menu.

Slide 8 - Single Day FMLA Request 2

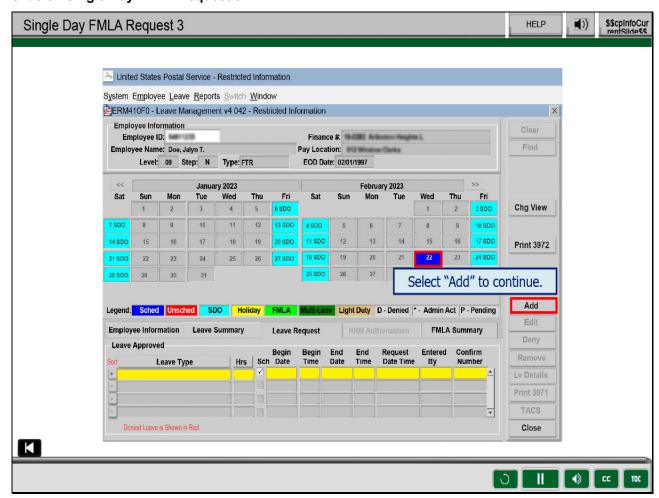


On the Leave Management screen, enter Jalyn's EIN.

For training purposes the EIN has been entered for you.

Select <Enter> to continue.

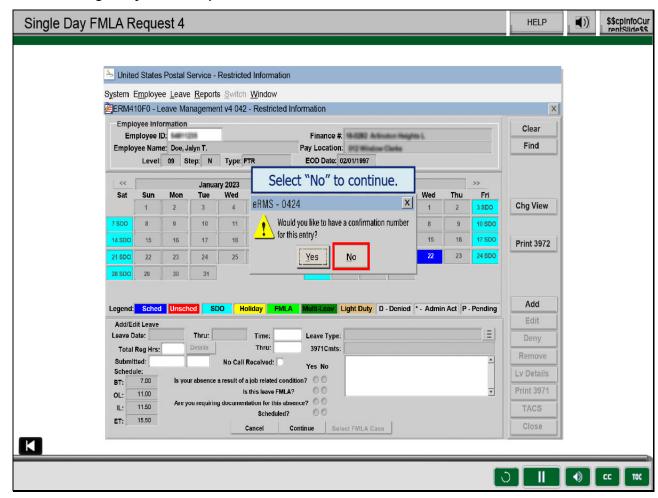
Slide 9 - Single Day FMLA Request 3



Jalyn's information populates.

Select the date of Jalyn's leave and select "Add."

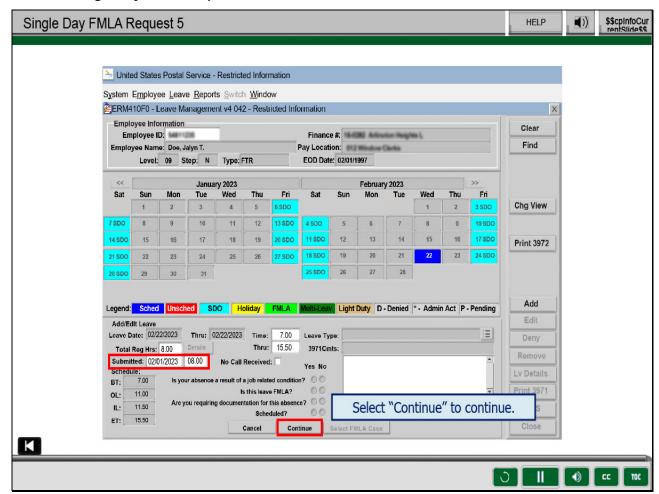
Slide 10 - Single Day FMLA Request 4



At the pop-up message "Would you like to have a confirmation number for this entry?"

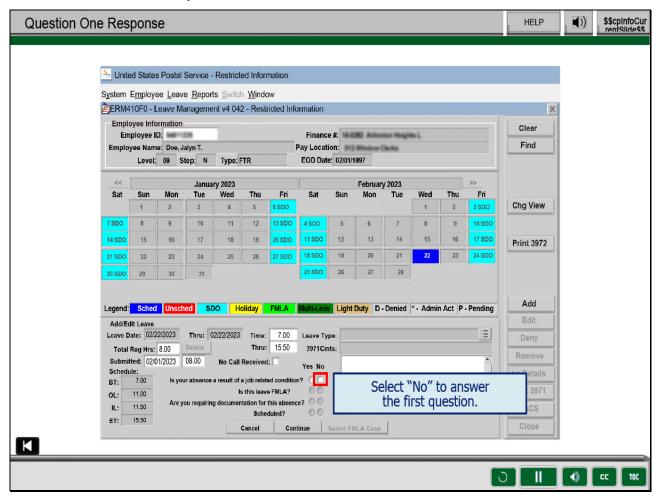
Select "No."

Slide 11 - Single Day FMLA Request 5



Enter the Submitted date and time and select "Continue" to answer the four questions.

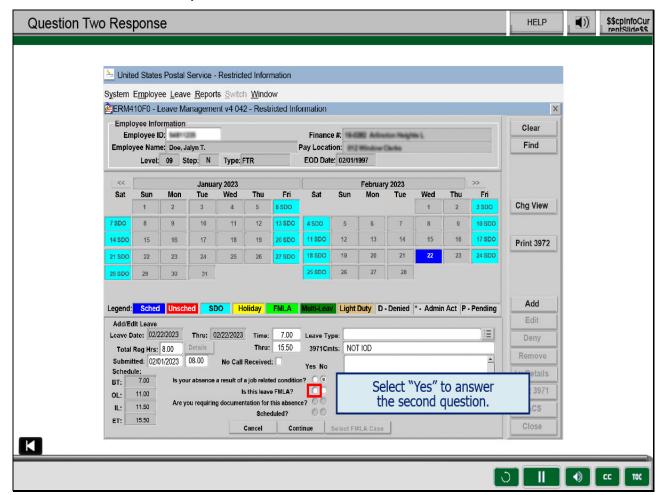
Slide 12 - Question One Response



Select the "No" button to answer the first question,

"Is your absence a result of a job-related condition?"

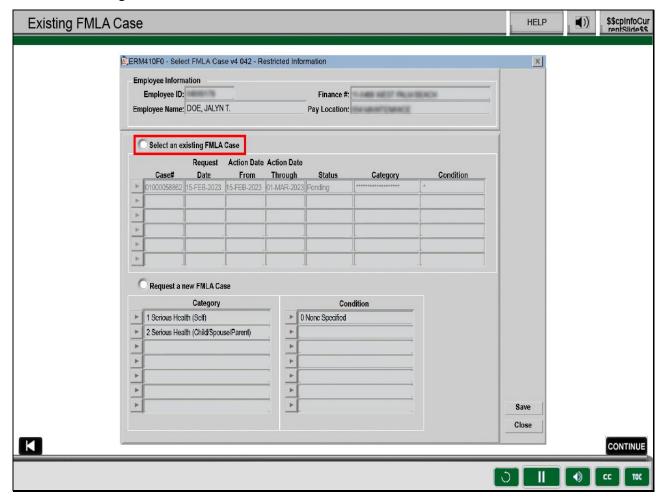
Slide 13 - Question Two Response



When you answer "Yes" to "Is this leave FMLA,"

the FMLA case selection screen appears.

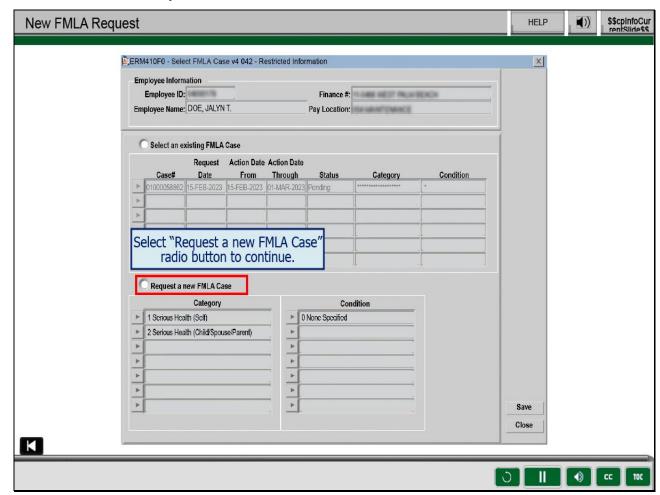
Slide 14 - Existing FMLA Case



If this leave was for an existing FMLA case, you would select the radio button

for "Select an existing FMLA Case" and then highlight the appropriate case.

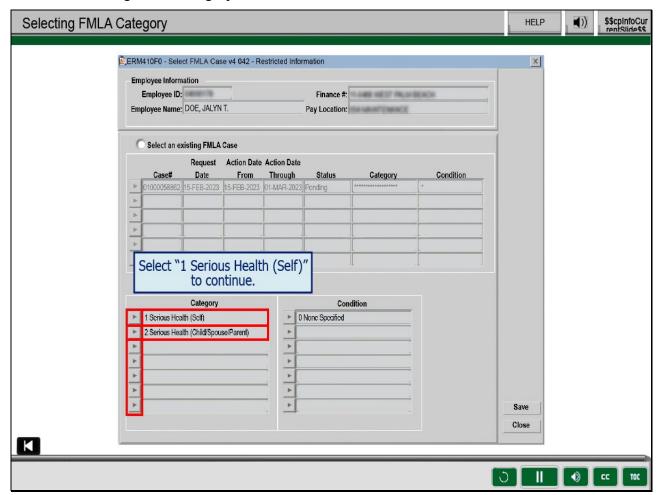
Slide 15 - New FMLA Request



Since it's not an existing FMLA case,

select the radio button associated with "Request a New FMLA Case."

Slide 16 - Selecting FMLA Category



Select a category by selecting the carat in front of the appropriate category.

If the absence is related to a serious health condition for the employee's self,

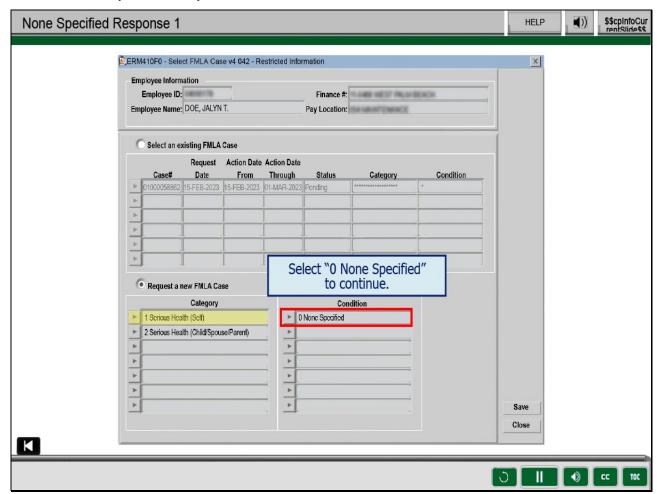
you would select option 1 Serious Health (Self).

If the absence is related to a serious health condition of the employee's child,

spouse, or parent, you would select option 2, "Serious Health (Child/spouse/parent.)

Select "Serious Health (Self)."

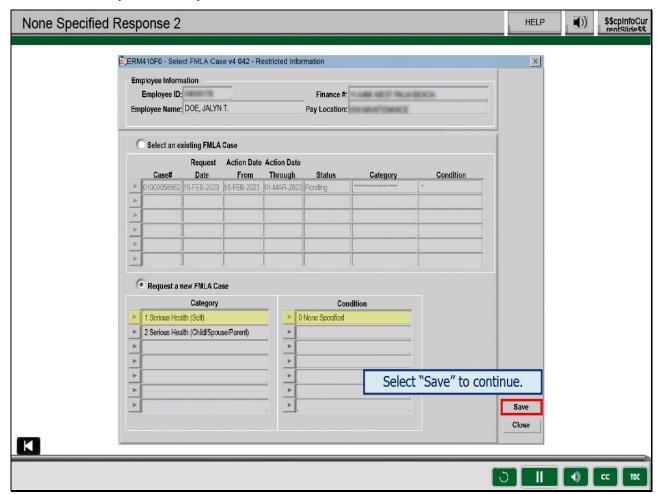
Slide 17 - None Specified Response 1



As a lead clerk, the options for "condition" are not available to you.

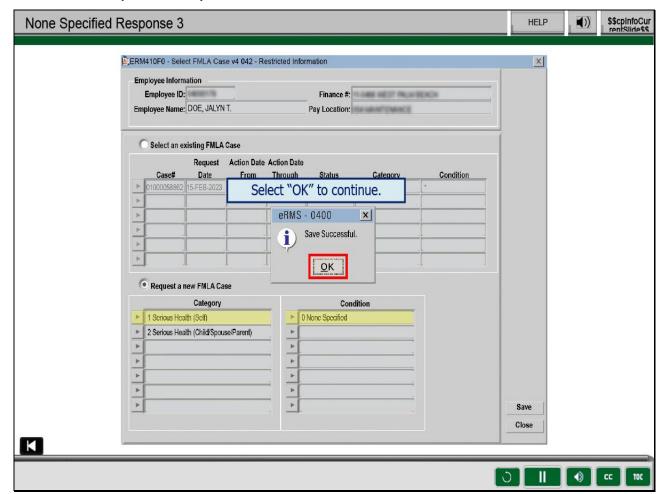
Select "0 None Specified" for Condition .

Slide 18 - None Specified Response 2



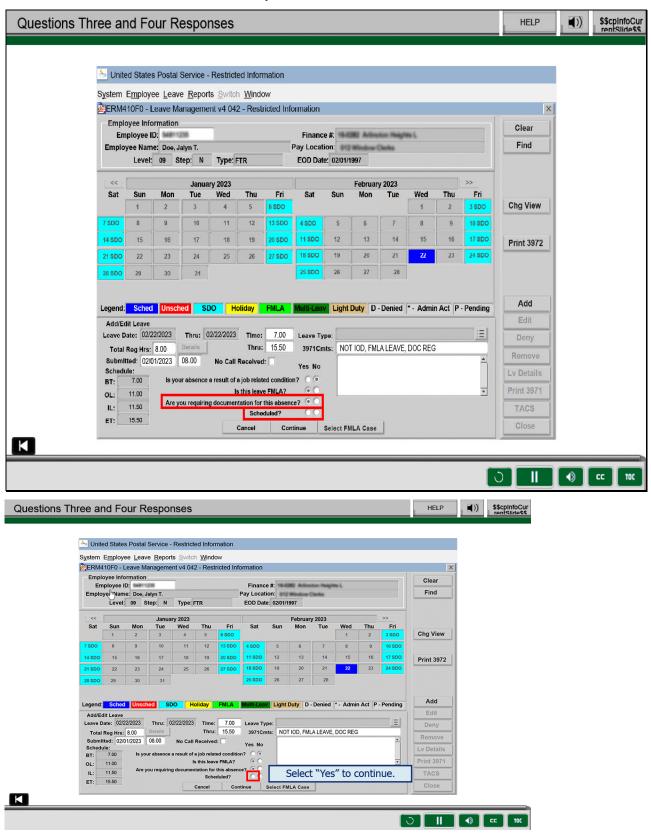
Select "Save" to continue.

Slide 19 - None Specified Response 3



Select "OK" to continue.

Slide 20 - Questions Three and Four Responses

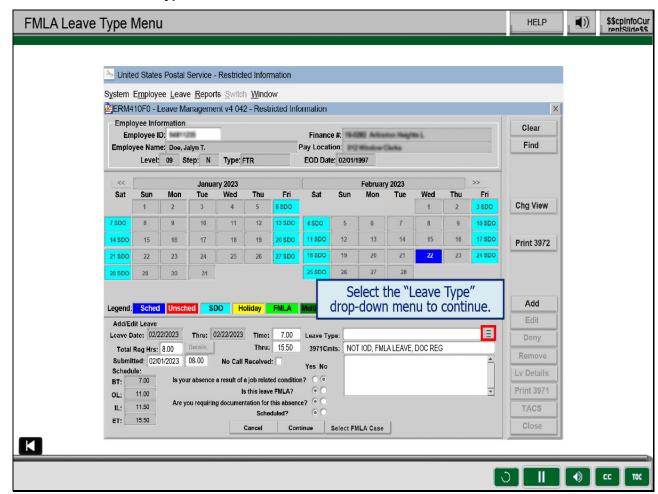


Since a new FMLA case requires medical documentation as support,

the requiring documentation question automatically populates.

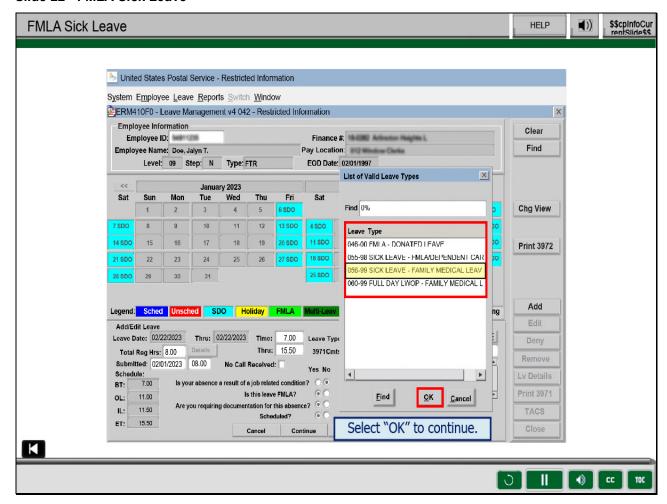
Answer the remaining question, "Scheduled?" Select "Yes" to continue.

Slide 21 - FMLA Leave Type Menu



Select the "Leave Type" drop-down menu to continue.

Slide 22 - FMLA Sick Leave



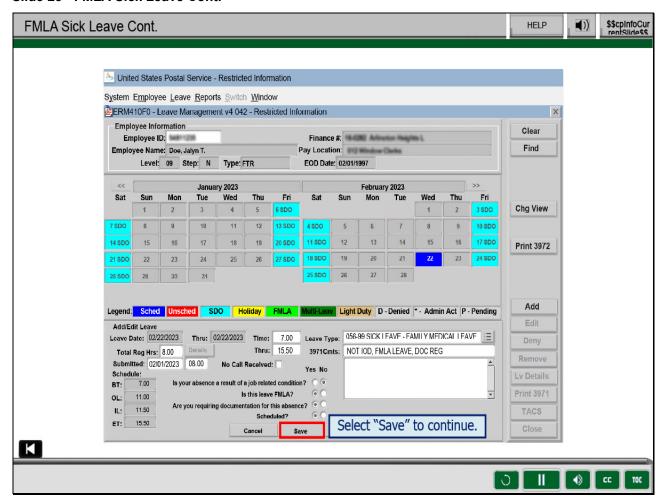
Slide notes

From the "Leave Type" drop-down menu,

notice the list of leave types are all coded FMLA.

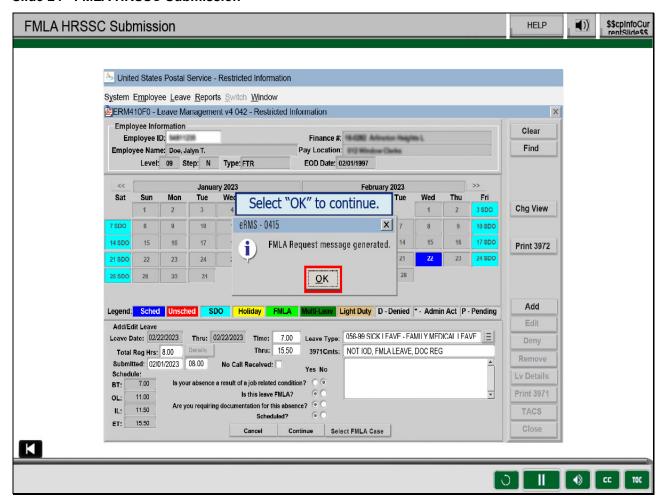
Select the "056-99 Sick Leave", then select "OK" to continue.

Slide 23 - FMLA Sick Leave Cont.



Select "Save" to continue.

Slide 24 - FMLA HRSSC Submission



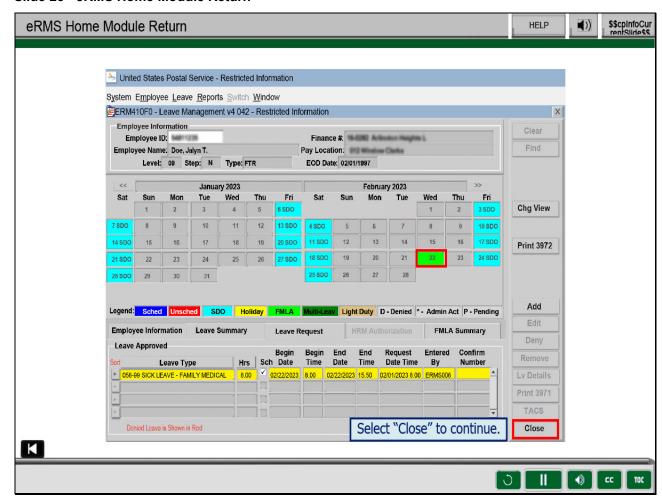
The FMLA request will be sent to the FMLA specialists at the

Human Resources Shared Services Center (HRSSC) in Greensboro,

North Carolina, so they can begin to process the case.

Select "OK" to the pop-up indicating "FMLA Request message generated."

Slide 25 - eRMS Home Module Return



The scheduled leave will appear in bright green.

Select "Close" to return to the eRMS Home Module.

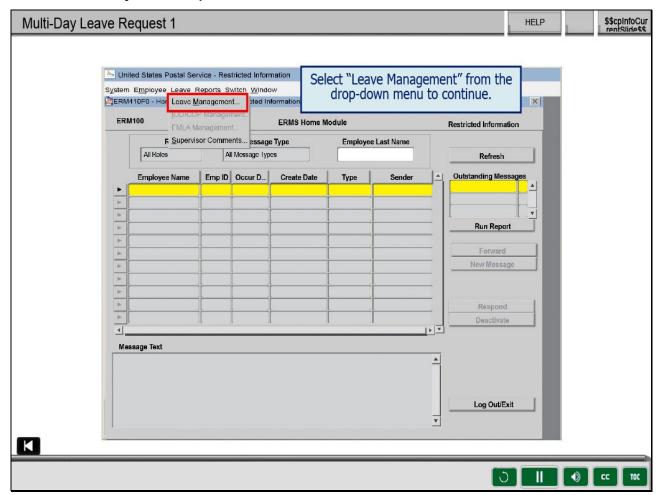
Slide 26 - Leave Entries - Multi-Day Leave Requests



Next, let's look at processing a supervisor-approved PS Form 3971

submitted by an employee for multi-day leave request.

Slide 27 - Multi-Day Leave Request 1



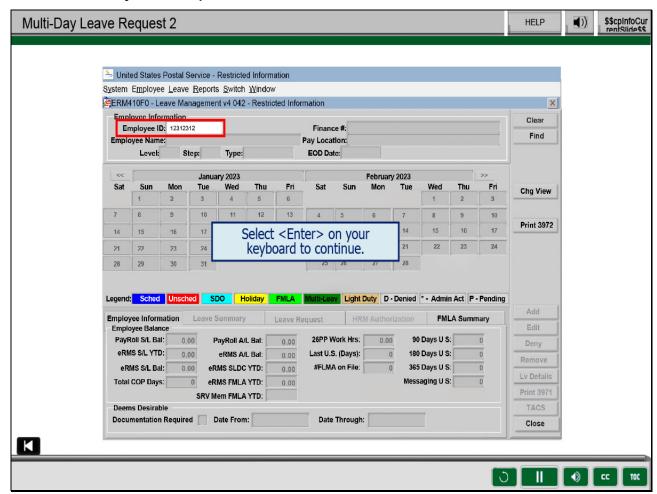
Howard requested 80 hours of Annual Leave for 03/18/2023 to 03/31/2023.

HIs scheduled days off for those two weeks are Sunday and Wednesday

for week 1 and Sunday and Thursday for week 2.

Select "Leave Management" on the Leave drop-down menu to continue.

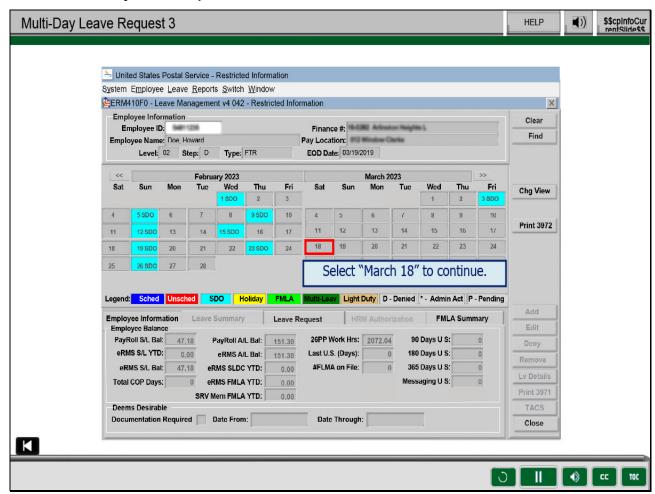
Slide 28 - Multi-Day Leave Request 2



For training purposes, the EIN has been entered for you.

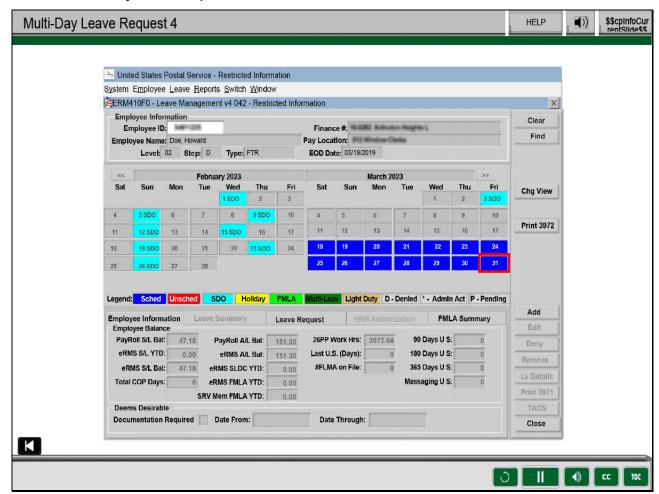
Select <Enter> to continue.

Slide 29 - Multi-Day Leave Request 3



Select March "18th" on the calendar.

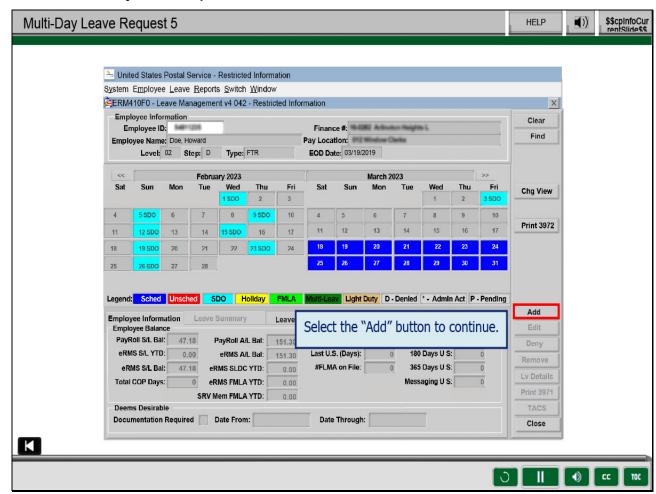
Slide 30 - Multi-Day Leave Request 4



Hold the <Shift> key down and select March "31st" on the calendar.

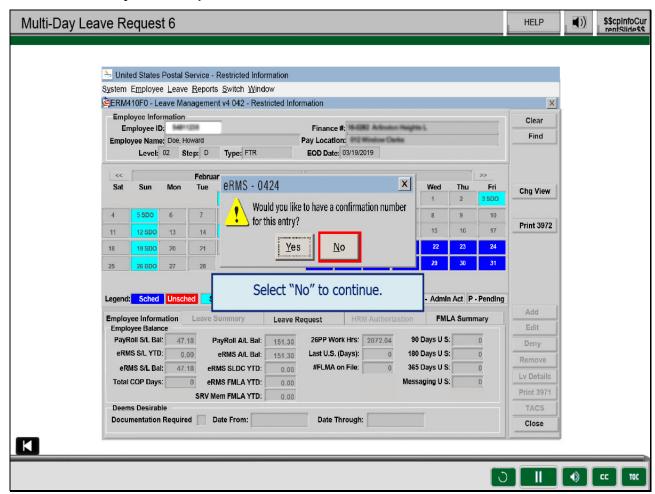
The entire block of dates will be highlighted on the Leave Management screen.

Slide 31 - Multi-Day Leave Request 5



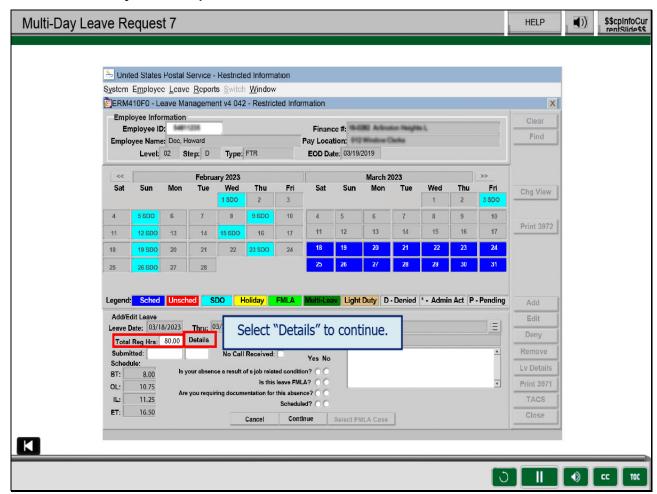
Select "Add" to continue.

Slide 32 - Multi-Day Leave Request 6



Answer "No" to, "Would you like a confirmation number?"

Slide 33 - Multi-Day Leave Request 7



Change the "Total Requested Hours" field

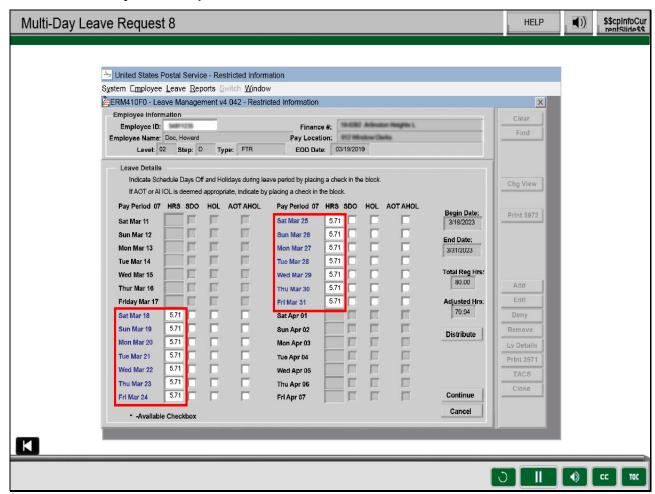
to the number of leave hours actually requested.

Always include two digits following the decimal point.

For training purposes, 80 hours has been entered for you.

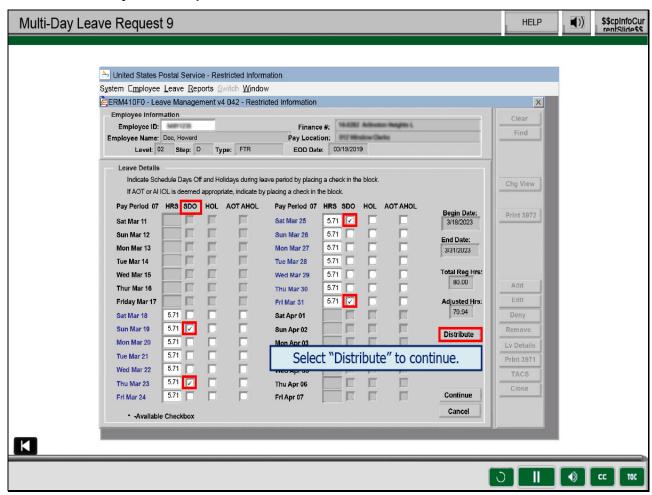
Select "Details" to continue.

Slide 34 - Multi-Day Leave Request 8



Notice eRMS will spread the total hours over the number of days.

Slide 35 - Multi-Day Leave Request 9

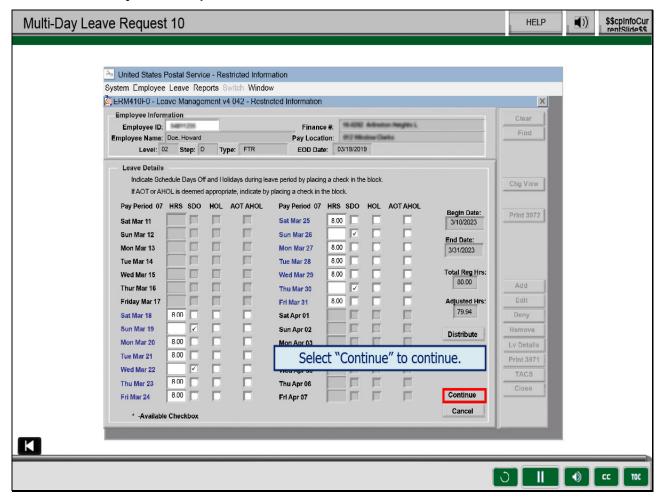


In the SDO (Scheduled Day Off) column select the scheduled days off.

This method can also be used for holidays.

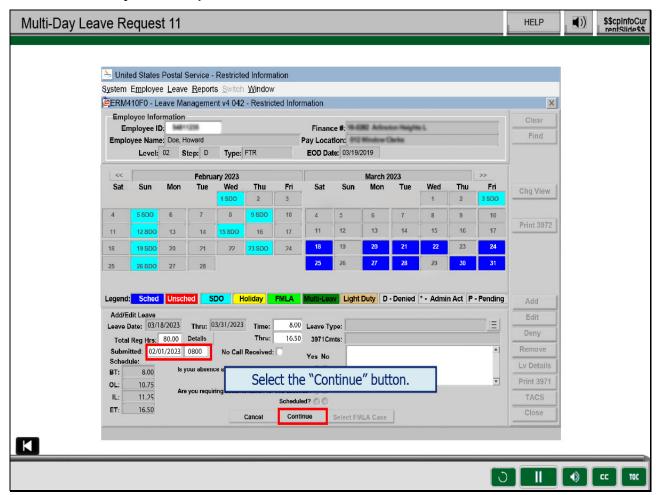
Select "Distribute" to put eight hours of leave on each scheduled day.

Slide 36 - Multi-Day Leave Request 10



Select "Continue."

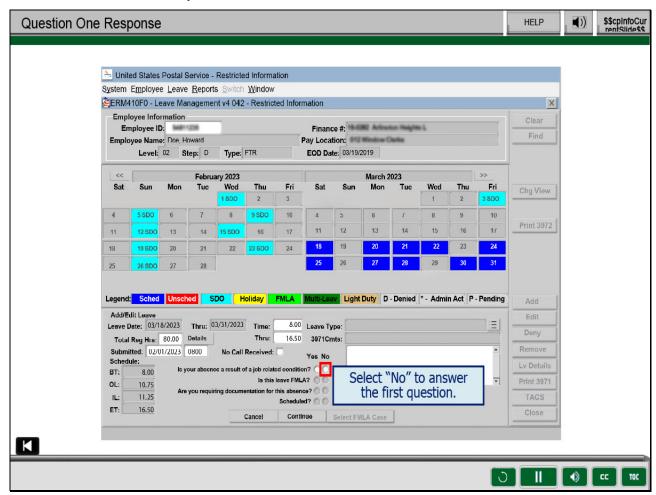
Slide 37 - Multi-Day Leave Request 11



Enter the "Submitted" date and time, 02/01/2023 at 0800.

Select "Continue" to continue entering this leave request.

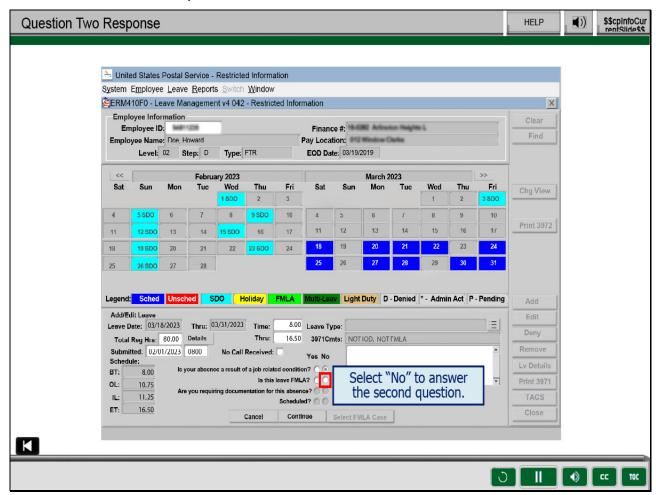
Slide 38 - Question One Response



Select the "No" button to answer the first question,

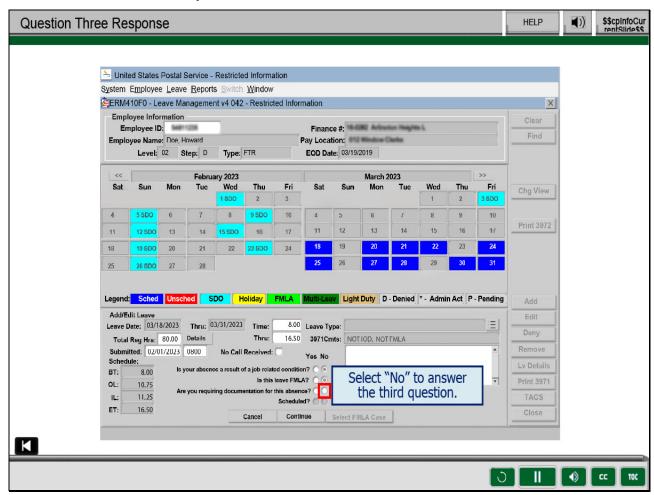
"Is your absence a result of a job-related condition?"

Slide 39 - Question Two Response



Select "No" to answer the second question, "Is this leave FMLA?"

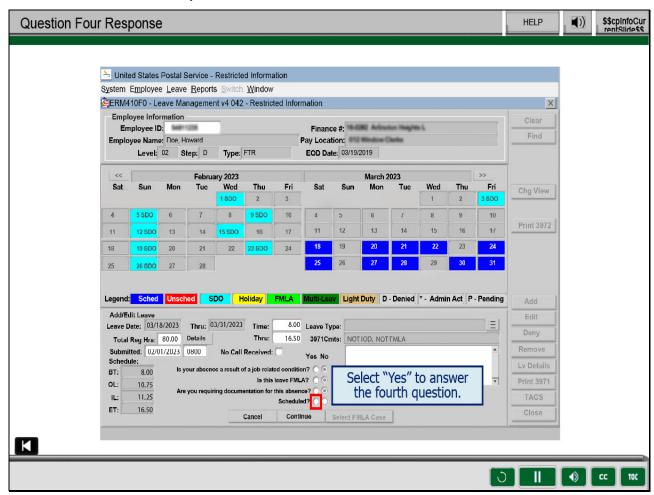
Slide 40 - Question Three Response



Select "No" to answer the third question,

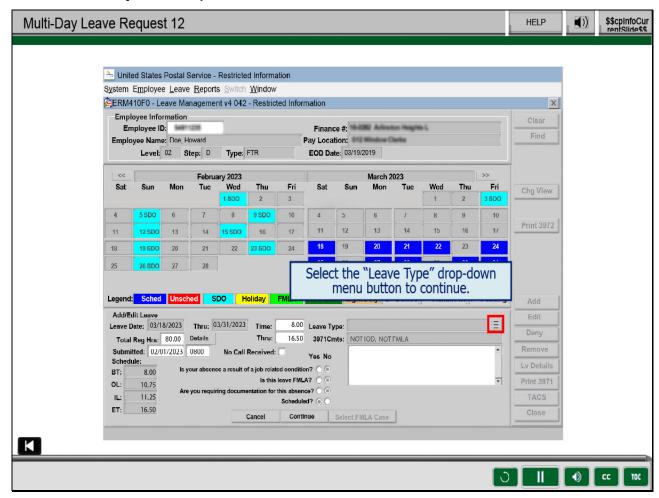
"Are you requesting documentation for this absence?"

Slide 41 - Question Four Response



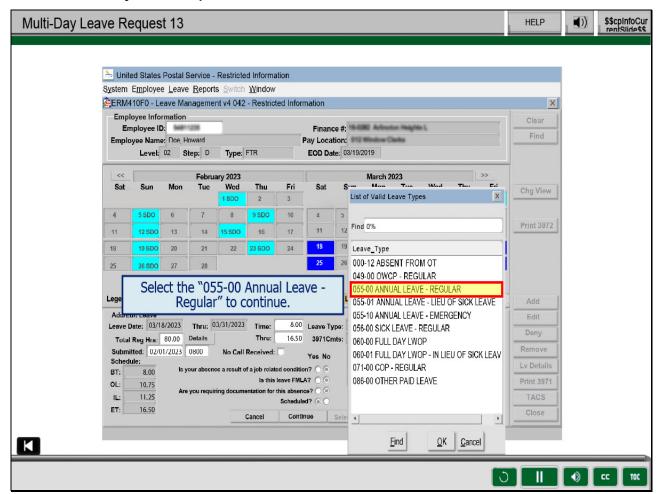
Select "Yes" to answer the fourth question, "Scheduled?"

Slide 42 - Multi-Day Leave Request 12



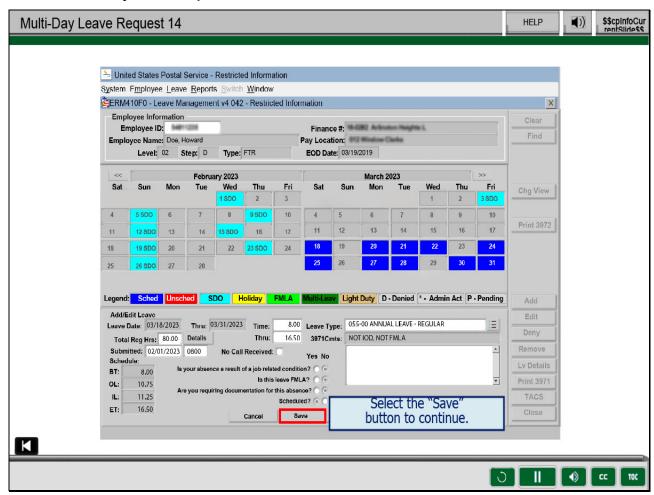
Select the "Leave Type" drop-down menu button to continue.

Slide 43 - Multi-Day Leave Request 13



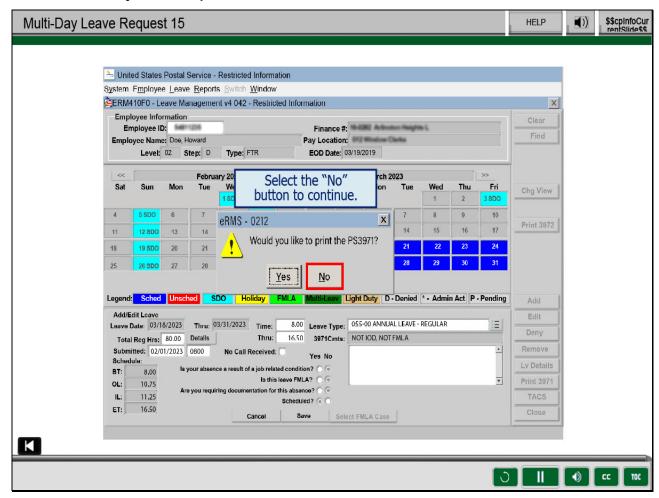
Select "055-00 Annual Leave - Regular" to continue.

Slide 44 - Multi-Day Leave Request 14



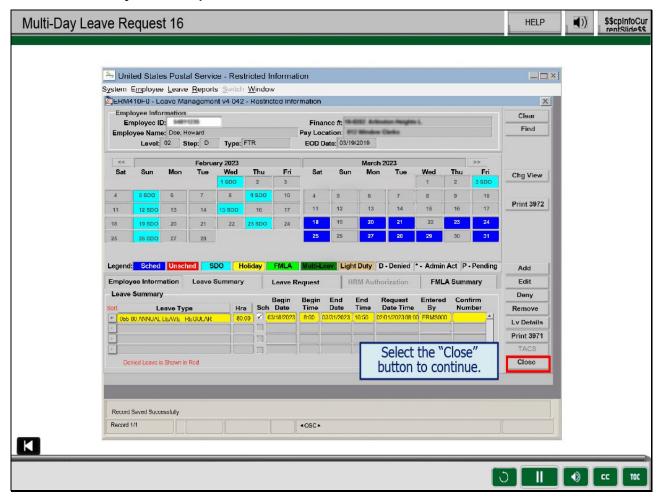
Select "Save" to continue.

Slide 45 - Multi-Day Leave Request 15



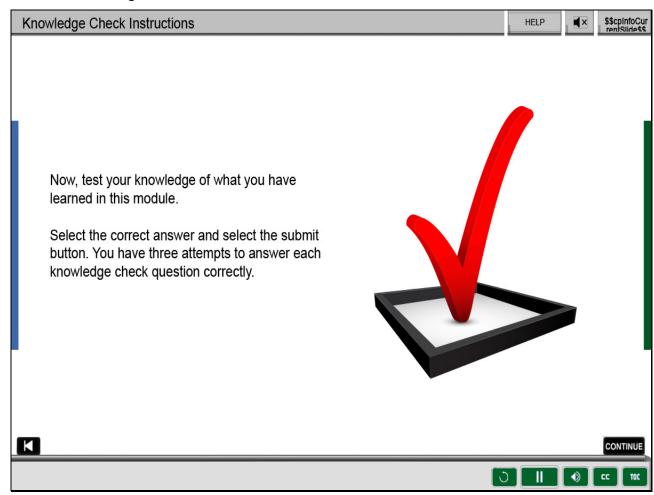
Select "No" to continue.

Slide 46 - Multi-Day Leave Request 16

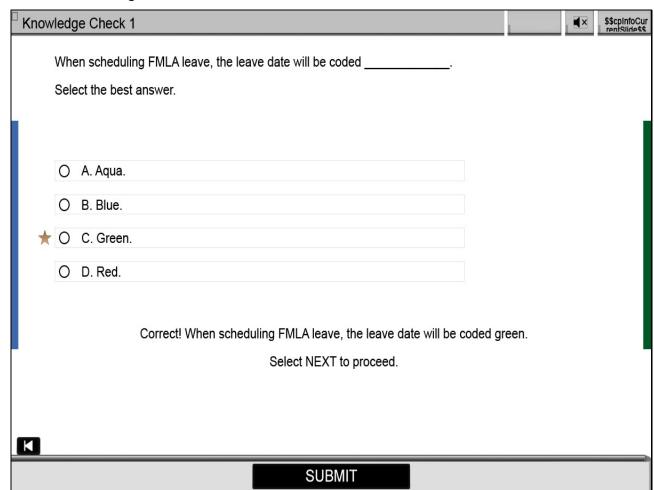


Select "Close" to return to the eRMS Home Module.

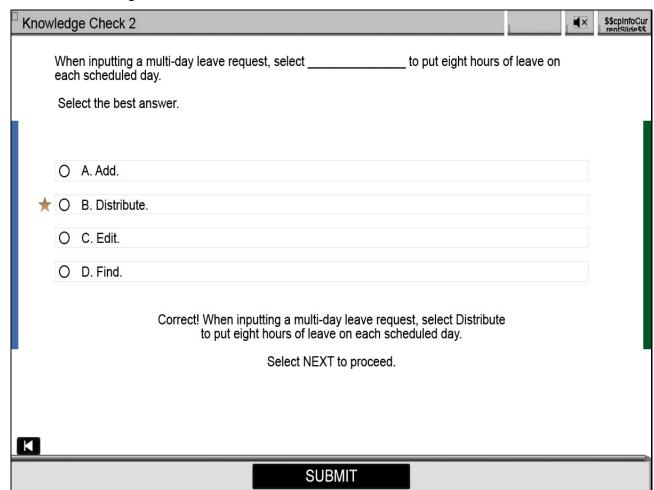
Slide 47 - Knowledge Check Instructions



Slide 48 - Knowledge Check 1



Slide 49 - Knowledge Check 2



Slide 50 - Credit and Completion



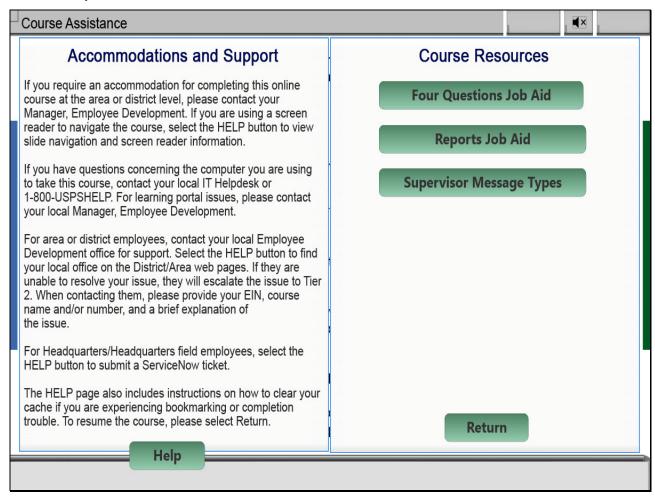
Slide 1 - Title



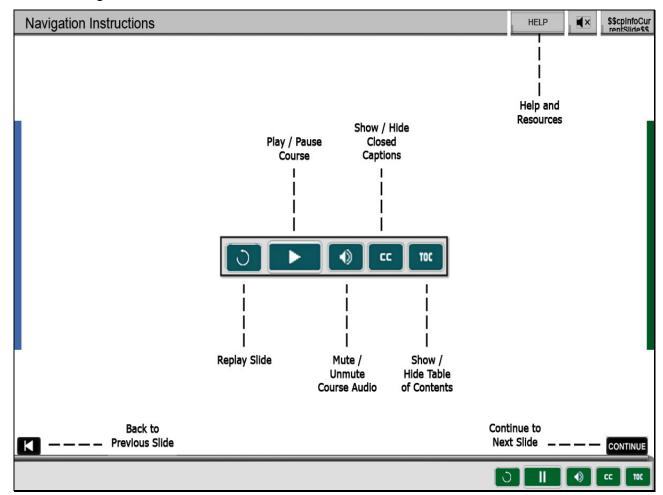
Welcome to Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 3: Removing and Editing Leave.

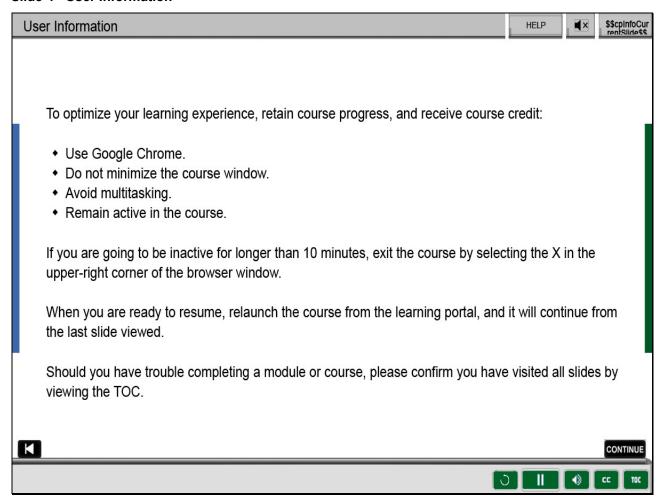
Slide 2 - Help



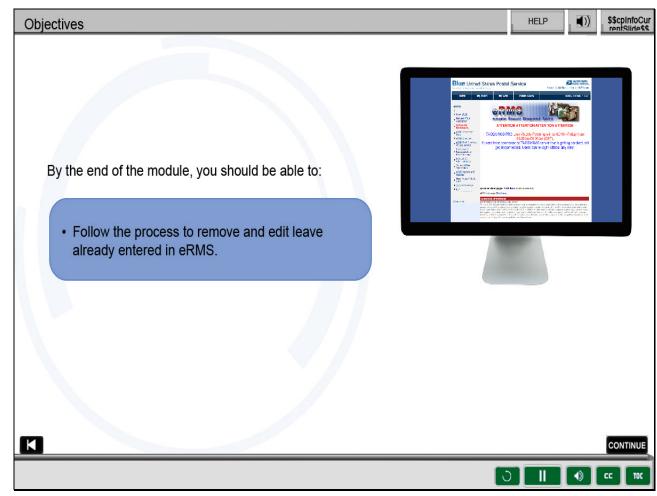
Slide 3 - Navigation Instructions



Slide 4 - User Information



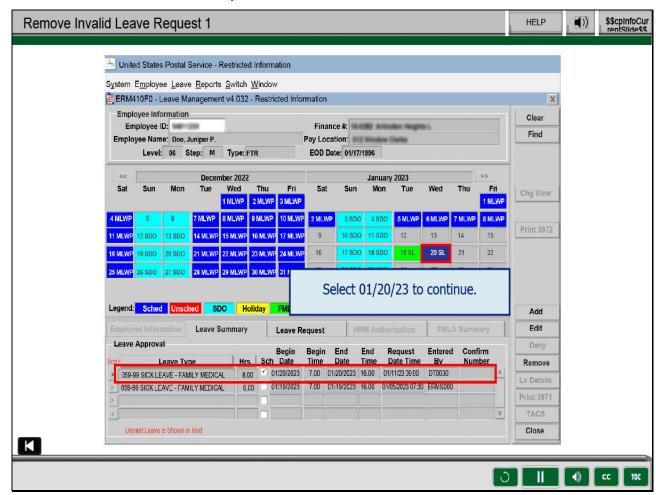
Slide 5 - Objectives



Slide notes

By the end of this module, you should be able to follow the process to remove and edit leave already entered in eRMS.

Slide 6 - Remove Invalid Leave Request 1



Now that we have discussed how to make entries for supervisor-approved

leave requests for single day, FLMA, and multiple-day leave,

we will discuss how to remove leave already entered in eRMS.

On January 1, a supervisor gave you a PS Form 3971,

Request for or Notification of Absence, submitted by Juniper Doe

and approved by the supervisor for 8 hours of FMLA, protected Sick Leave for January 20th.

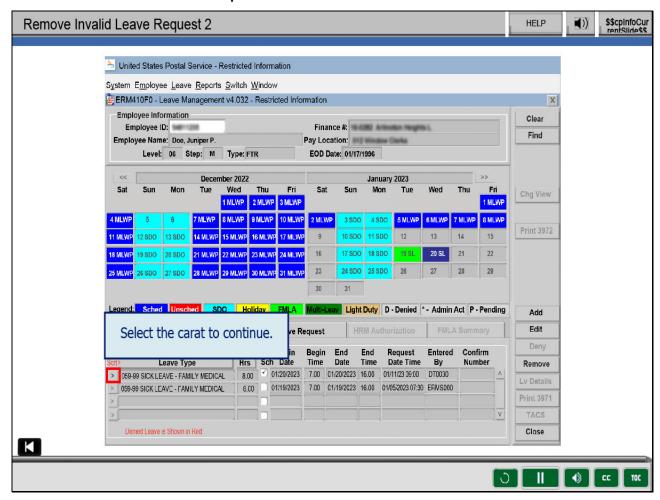
You already entered the leave into eRMS.

On January 11, the employee changed the appointment to a later date

and asked the supervisor to cancel the leave request for January 20, 2023.

To remove the leave entered, select January 20th on the calendar.

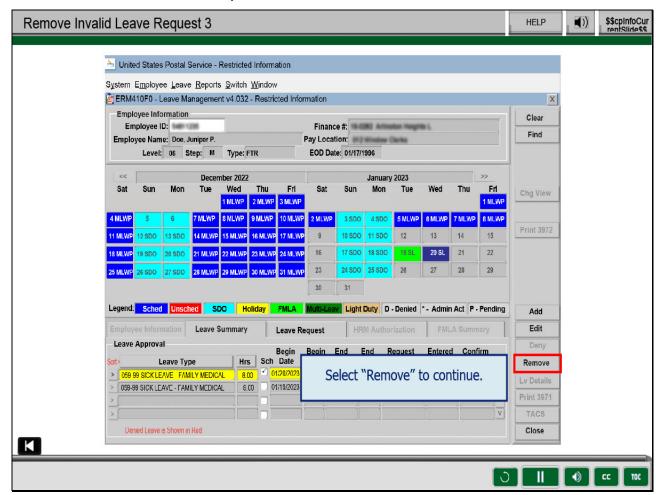
Slide 7 - Remove Invalid Leave Request 2



In the Leave Summary tab, highlight the leave entry that needs to be deleted

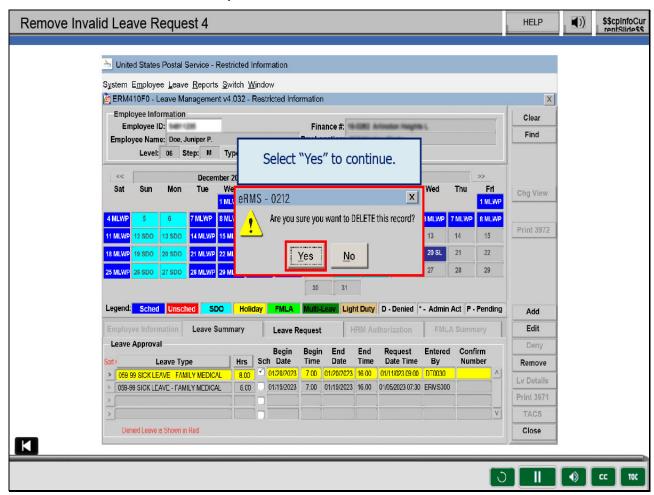
by selecting the carat left of the leave type on the row you wish to delete.

Slide 8 - Remove Invalid Leave Request 3



Once highlighted, select the "Remove" button.

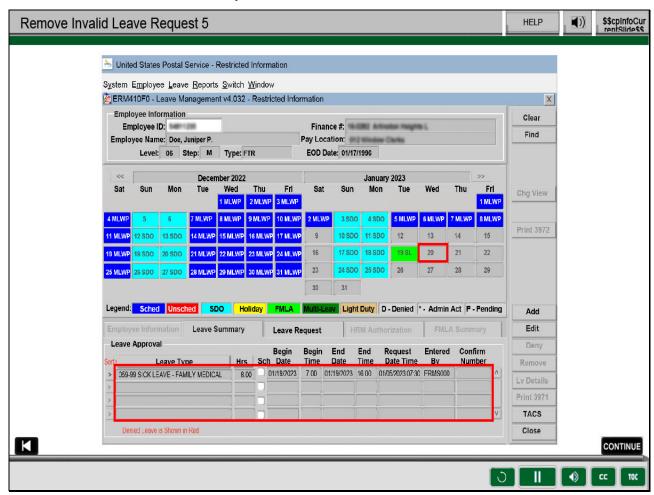
Slide 9 - Remove Invalid Leave Request 4



A pop-up message, "Are you sure you want to DELETE this record?" displays.

Select "Yes."

Slide 10 - Remove Invalid Leave Request 5

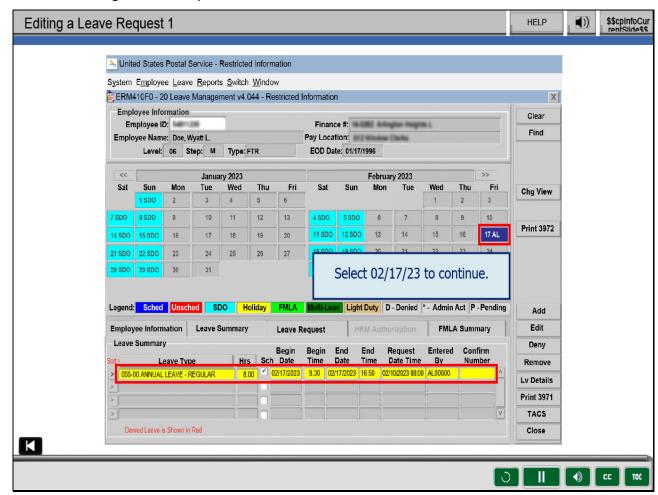


The 8 hours of FMLA SL for January 20th, 2023 has been removed.

Notice the leave has been removed from the Leave Summary

tab and from the leave calendar.

Slide 11 - Editing a Leave Request 1



Next, we will be discussing the process for editing leave

already entered into the system.

On February 10th, your supervisor hands you a PS Form 3971,

submitted by Wyatt Doe and approved by the supervisor for eight hours of

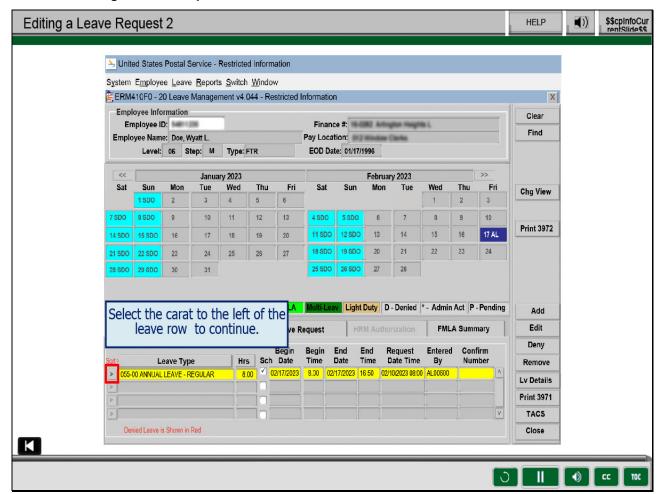
Sick Leave for February 17th.

After you enter the leave, you realize you accidently entered

Annual Leave (AL) instead of Sick Leave.

To edit and correct the leave, select February 17th on the leave calendar.

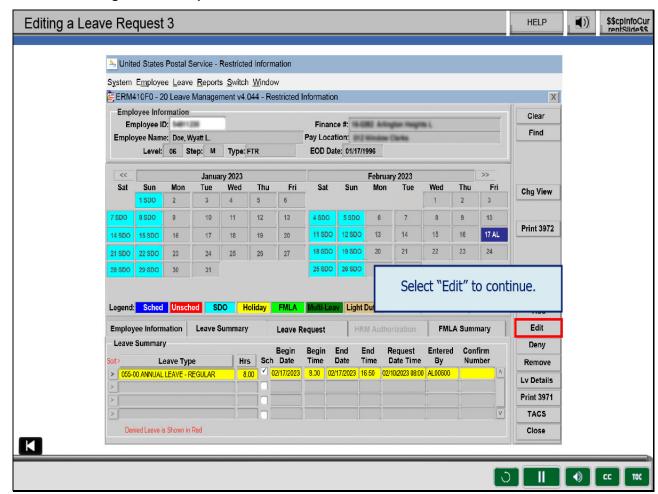
Slide 12 - Editing a Leave Request 2



If the leave summary row you want to edit is not already highlighted,

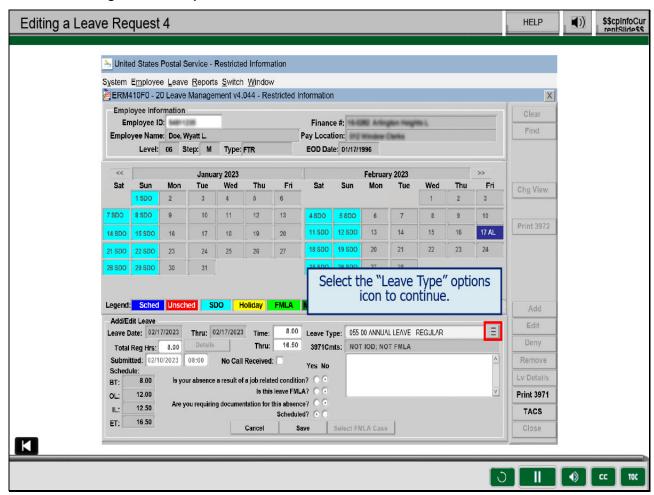
select the carat to the left of the leave type to highlight it.

Slide 13 - Editing a Leave Request 3



Once the row is selected, select "Edit."

Slide 14 - Editing a Leave Request 4



From this screen, you will be able to edit the hours requested,

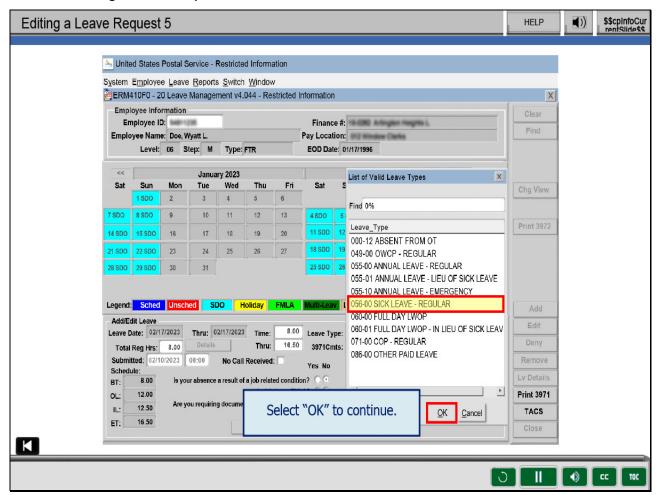
the time for the leave, the answer to the four questions, or the leave type.

For this scenario, we will be editing the leave type since we need to

correct it from Annual Leave to Sick Leave.

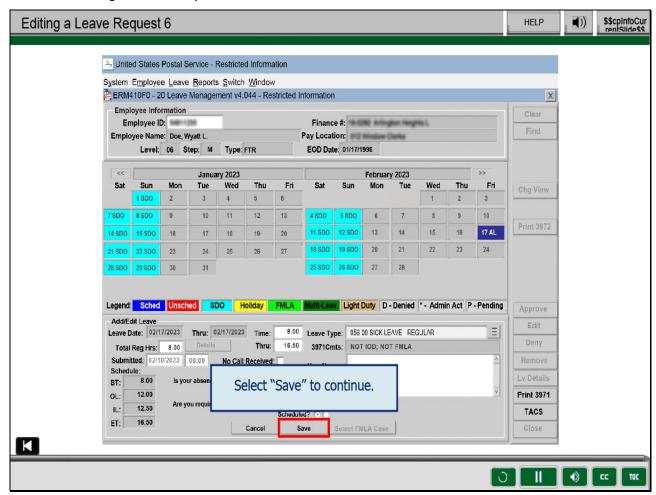
Select the "Leave Type" options icon.

Slide 15 - Editing a Leave Request 5



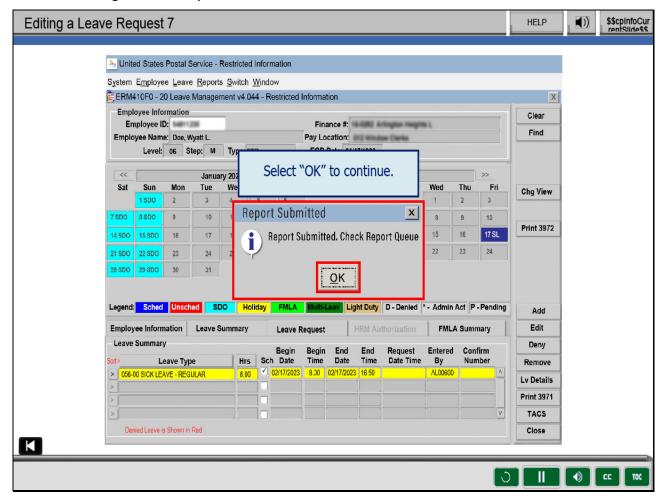
Select "Sick Leave" and select "OK."

Slide 16 - Editing a Leave Request 6



Select "Save."

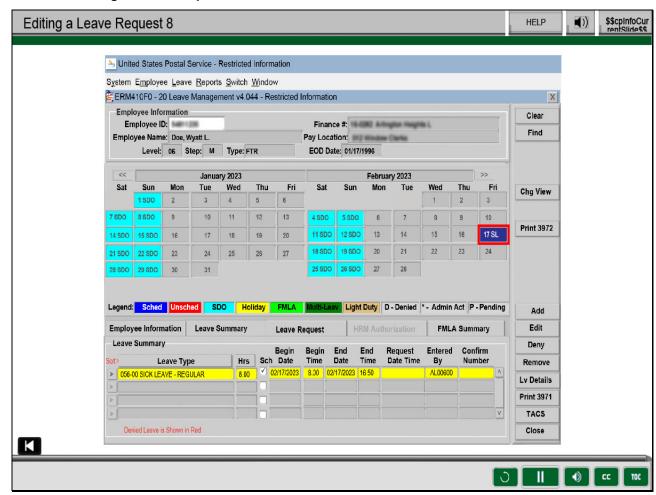
Slide 17 - Editing a Leave Request 7



The pop-up message, "Report Submitted. Check Report Queue" displays.

Select "OK."

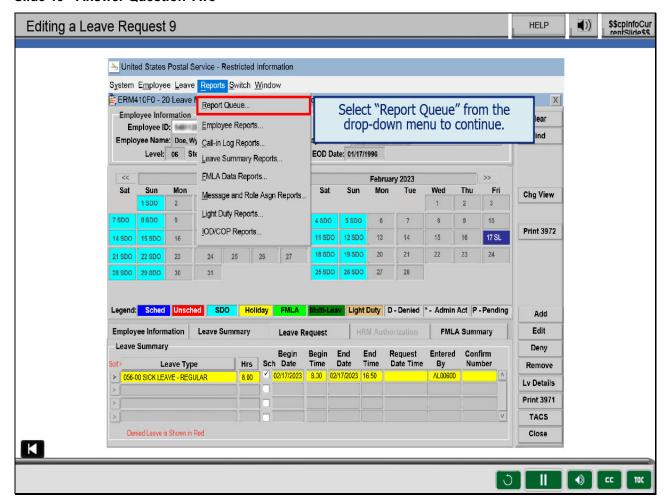
Slide 18 - Editing a Leave Request 8



Now, you will notice the leave type has been updated to Sick Leave

under the leave summary and on the leave calendar.

Slide 19 - Answer Question Two



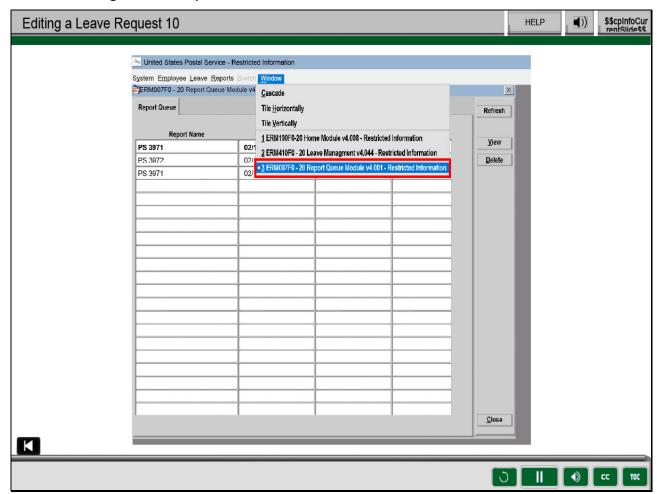
If the PS Form 3971, Request For or Notification of Absence,

already completed by the employee is not correct or sufficient,

you need to view and print the PS 3971 generated in your report queue.

To view your report queue, select "Report Queue" from the "Reports" drop-down menu.

Slide 20 - Editing a Leave Request 10

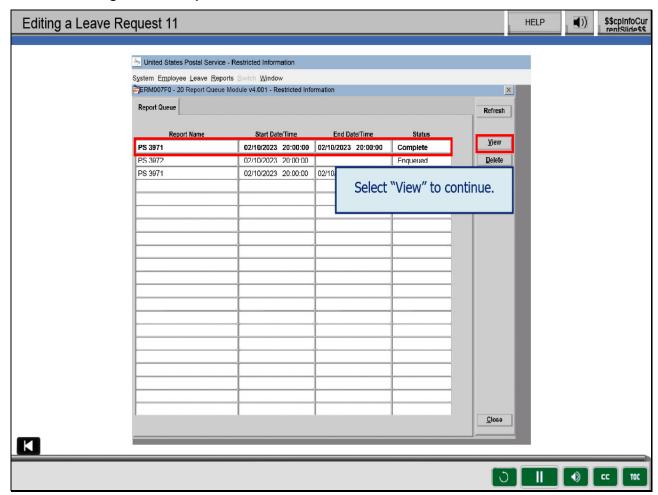


eRMS allows as many as five modules to be open at one time.

You can navigate from one screen to another by selecting "Window"

on the eRMS Main Menu bar, then selecting the appropriate module.

Slide 21 - Editing a Leave Request 11



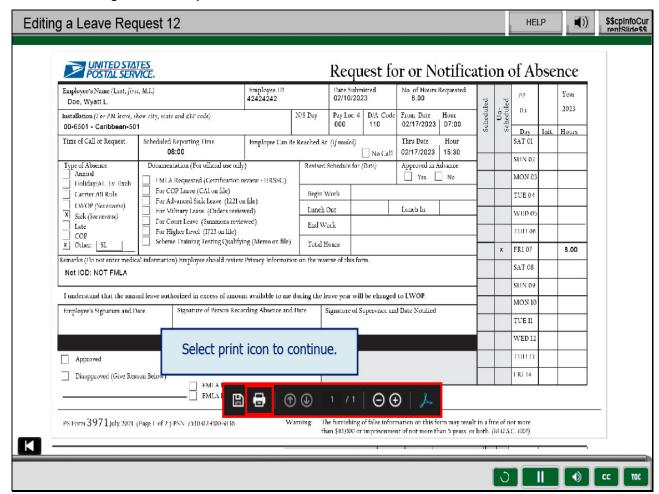
The PS Forms 3971 that you sent to the Report Queue is listed.

The last one you submitted should display on the top row.

Select the row you want to view.

Notice, the font will be bolded. Select "View."

Slide 22 - Editing a Leave Request 12



A new tab will open in your browser and display the report.

Review the form and verify the information is accurate.

When you are ready to print the report,

move your cursor slowly down the page until the

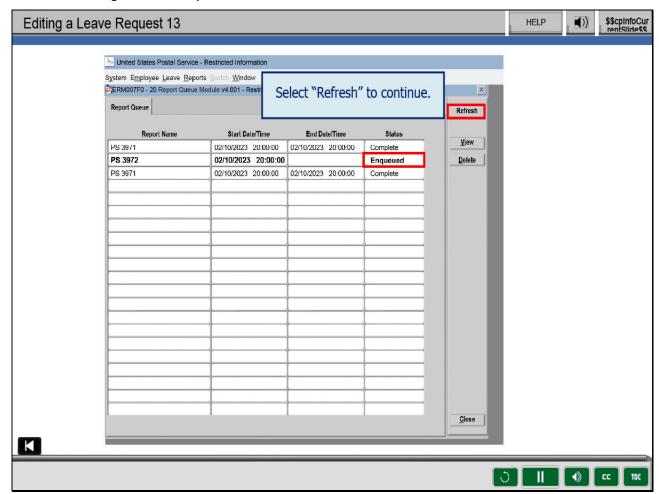
toolbar displays at the bottom of the page.

Select the print icon.

Note: If you need to print a new PS Form 3971,

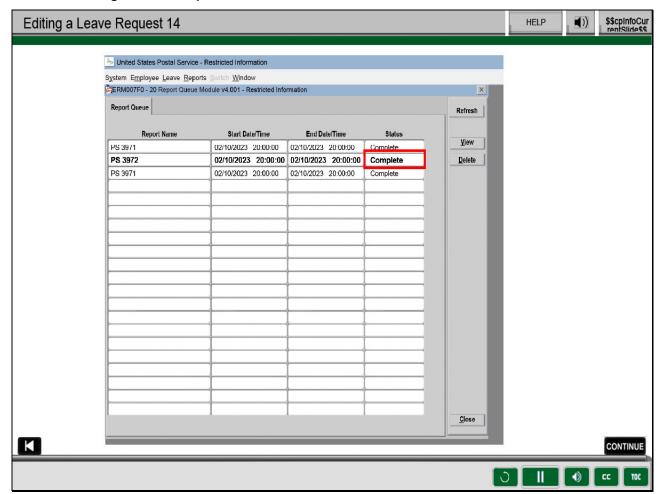
the form will need the required signatures.

Slide 23 - Editing a Leave Request 13



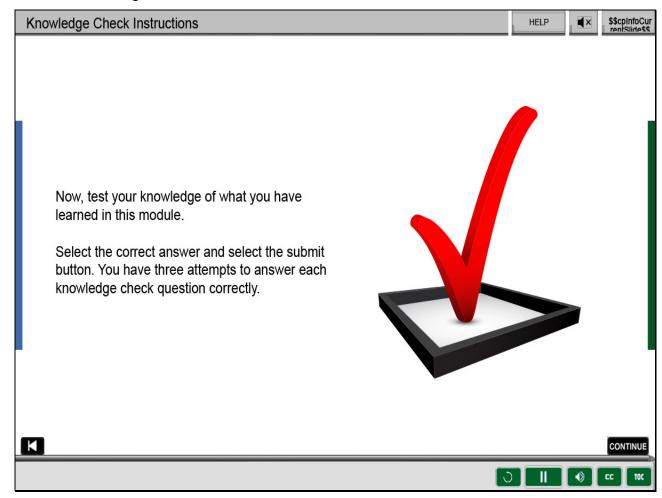
If the status is not "Complete," you can select "Refresh" to update the status of the report.

Slide 24 - Editing a Leave Request 14



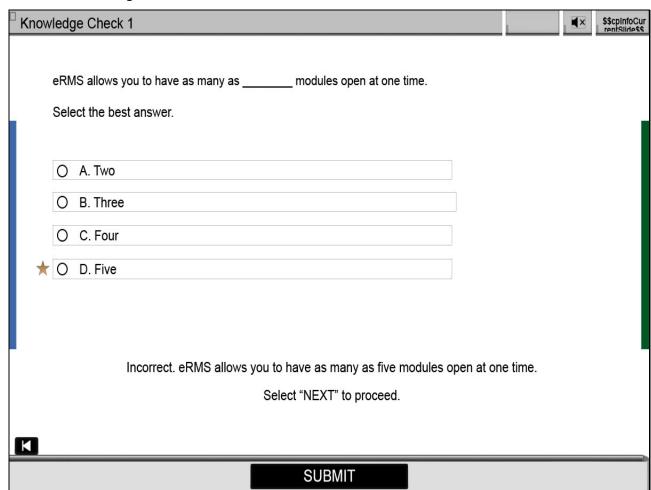
Once the status is "Complete," you will be able to view the report.

Slide 25 - Knowledge Check Instructions

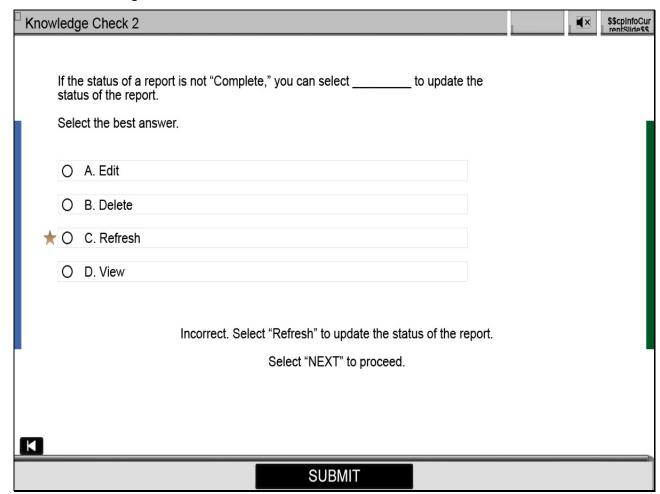


This will be a series of knowledge checks.

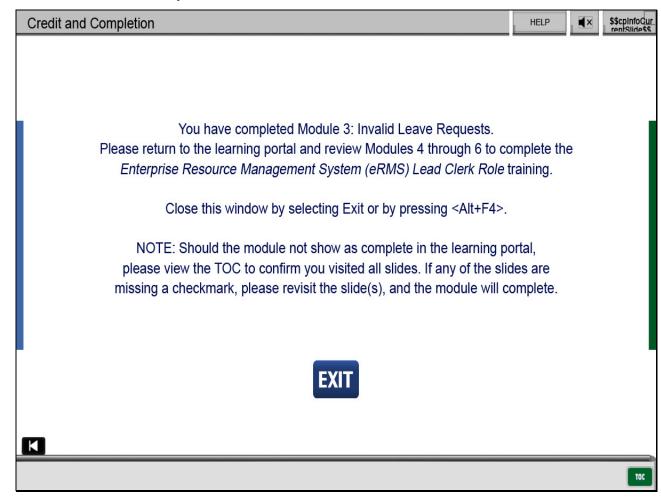
Slide 26 - Knowledge Check 1



Slide 27 - Knowledge Check 2



Slide 28 - Credit and Completion



Slide 1 - Title

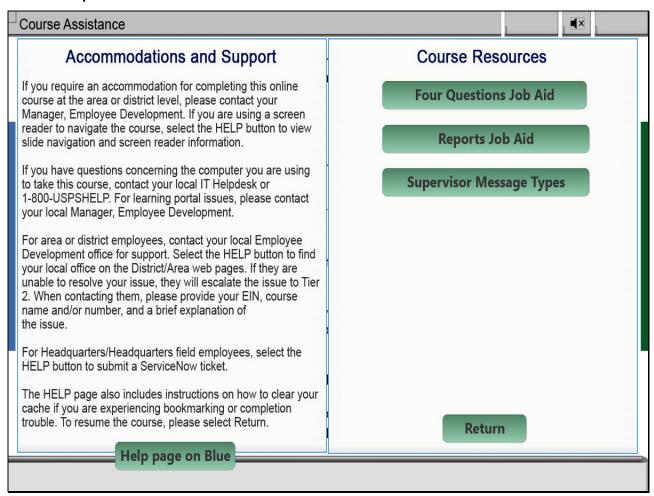


Slide notes

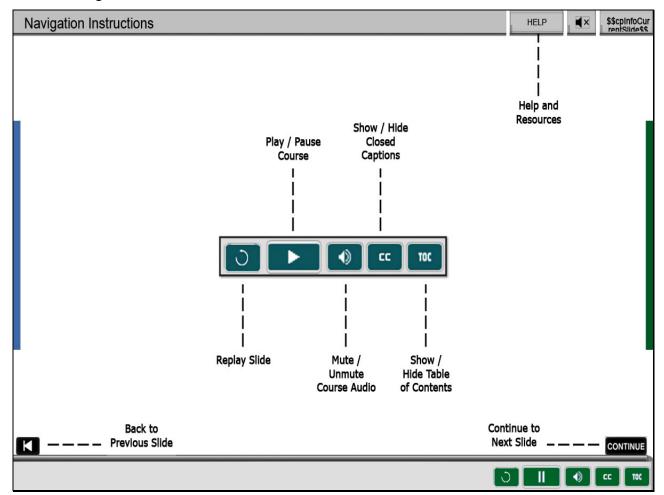
Welcome to Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 4: Injured-on-Duty (IOD) Requests.

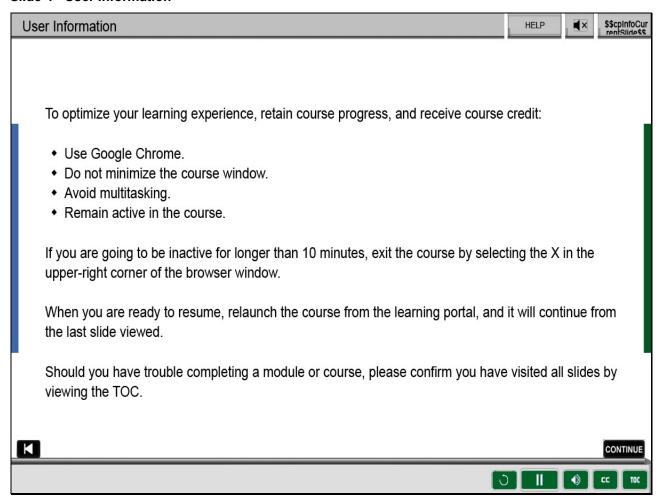
Slide 2 - Help



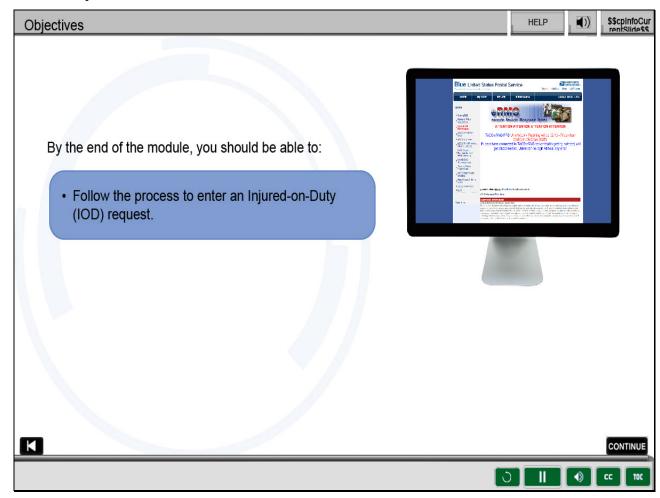
Slide 3 - Navigation Instructions



Slide 4 - User Information



Slide 5 - Objectives

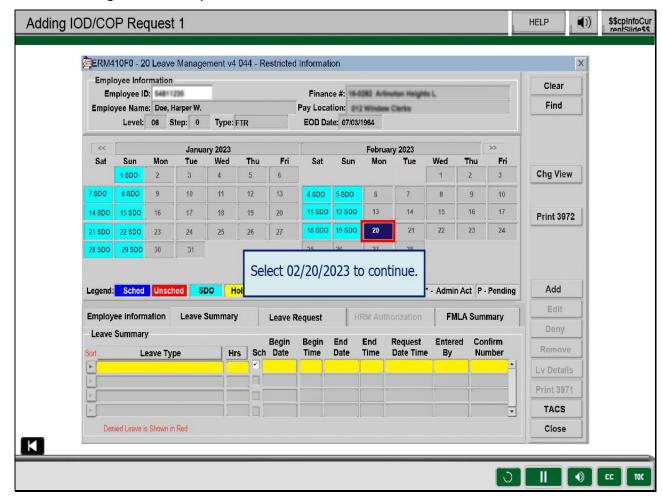


Slide notes

By the end of this module, you should be able to

follow the process to enter an Injured-on-Duty (IOD) request.

Slide 6 - Adding IOD/COP Request 1



Now that you have learned how to enter, edit, and remove leave,

including single day, multiple day, and FMLA request,

it is time to learn how to enter an Injured-on-Duty (IOD) request.

Harper Doe was injured on duty and has returned to work but must attend

physical therapy in the afternoon twice a week.

Your supervisor hands you a PS Form 3971, Request For or Notification of Absence,

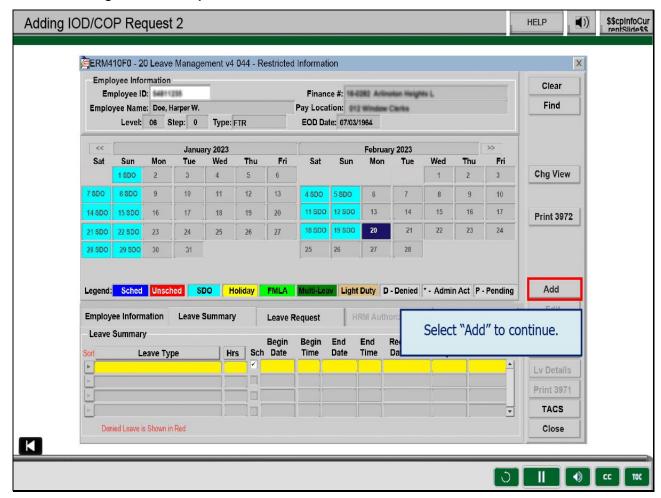
from Harper requesting three hours of Continuation of Pay (COP)

for physical therapy on February 20, 2023, for an "Injured-on-Duty" claim.

To enter the leave request into eRMS, navigate to the Leave Management screen,

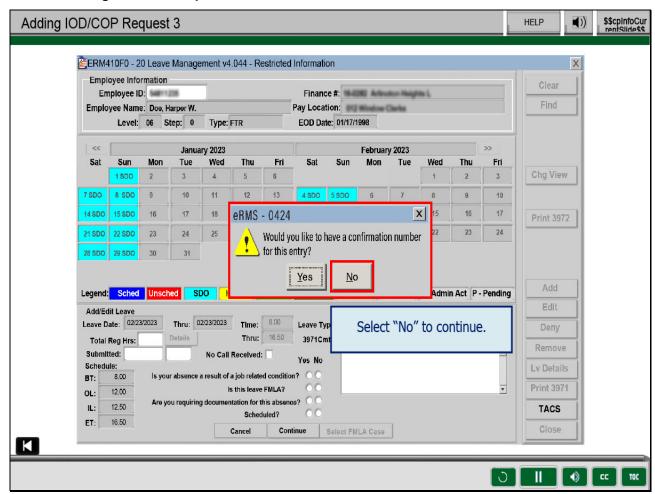
then select February 20 on the leave calendar.

Slide 7 - Adding IOD/COP Request 2



Then select "Add."

Slide 8 - Adding IOD/COP Request 3

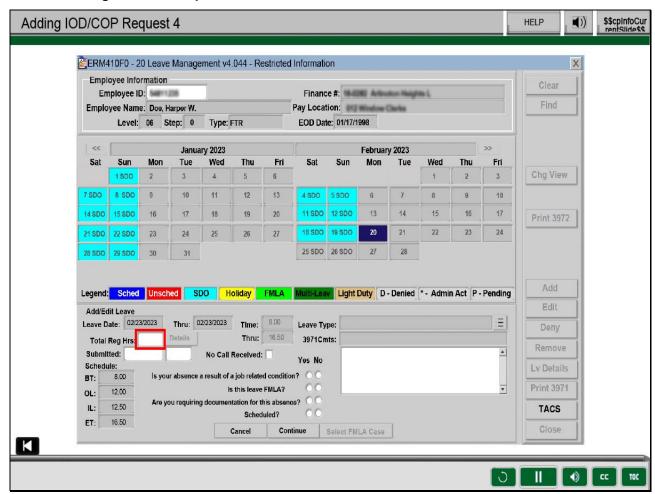


A pop-up message will display, "Would you like to have a

confirmation number for this entry?"

Select "No."

Slide 9 - Adding IOD/COP Request 4

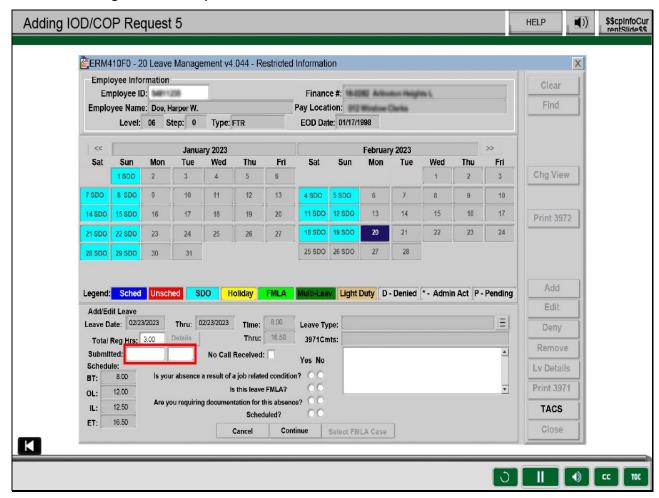


Since Harper is only requesting three hours of leave in

the afternoon to attend physical therapy,

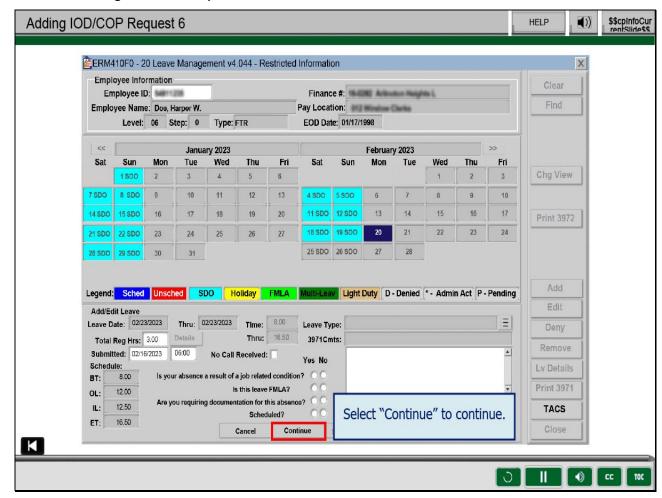
enter 3.00 for the "Total Required Hours."

Slide 10 - Adding IOD/COP Request 5



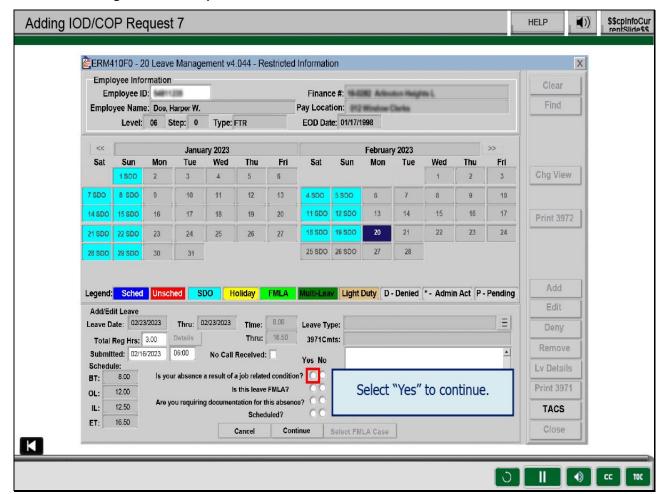
Enter the date and time the request for leave was submitted.

Slide 11 - Adding IOD/COP Request 6



Select "Continue."

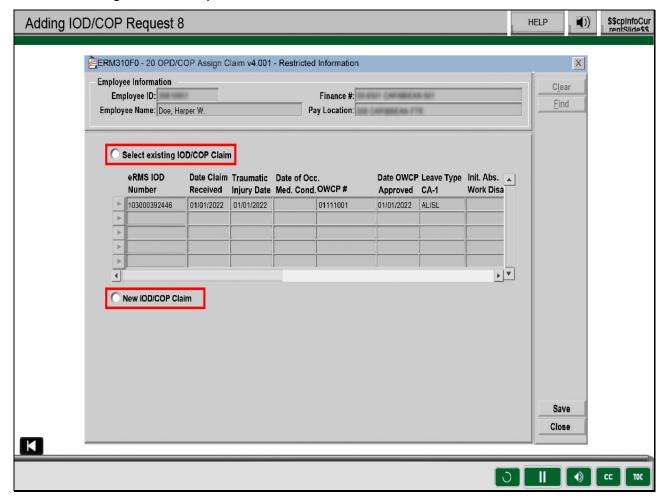
Slide 12 - Adding IOD/COP Request 7



Answer "Yes" to the first question,

"Is your absence the result of a job-related injury?"

Slide 13 - Adding IOD/COP Request 8

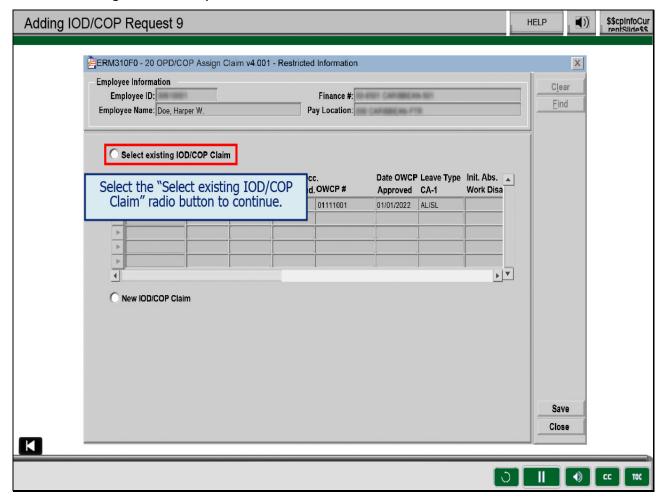


Now the IOD/COP screen is displayed.

You will select the radio button for

"Select an existing IOD/COP Claim" or "New IOD/COP Claim."

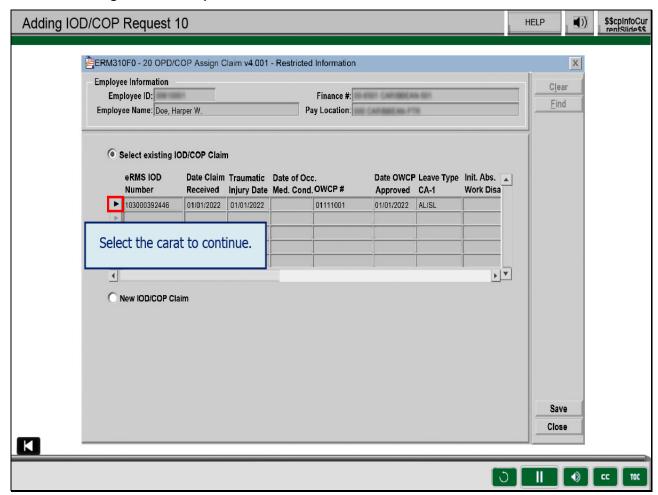
Slide 14 - Adding IOD/COP Request 9



Since this is an existing claim, you will select the

radio button for "Select existing IOD/COP Claim."

Slide 15 - Adding IOD/COP Request 10



Highlight the correct claim by clicking the carat on the

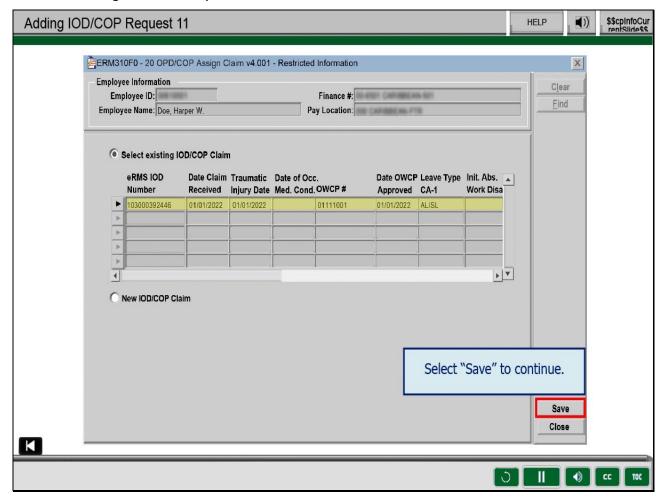
left side of the row with the claim you wish to select.

If an existing claim related to the absence is not listed,

select "New IOD/COP Claim."

Select the carat for the existing claim.

Slide 16 - Adding IOD/COP Request 11



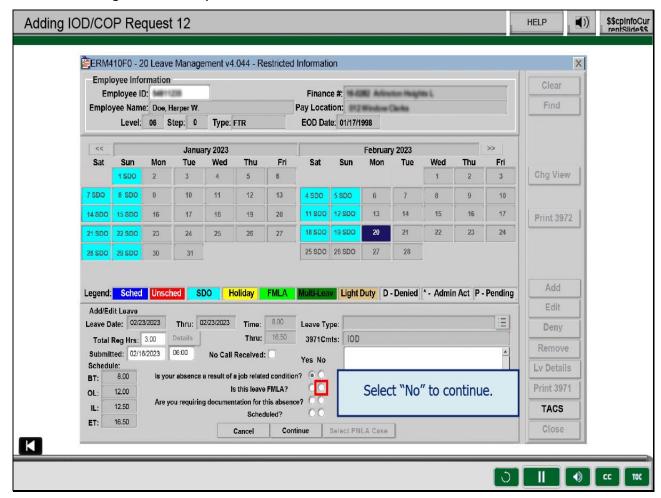
Once you select the appropriate claim, select "Save."

Please note, any IOD or COP leave entries cannot be approved,

denied, or edited until Human Resource Managemet (HRM) responds to the leave request.

Select "Save."

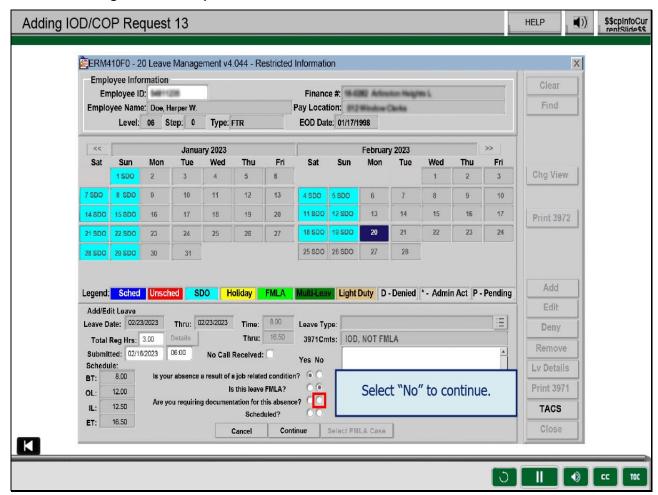
Slide 17 - Adding IOD/COP Request 12



Continue answering the remaining questions.

Answer "No" to the question, "Is this leave FMLA?"

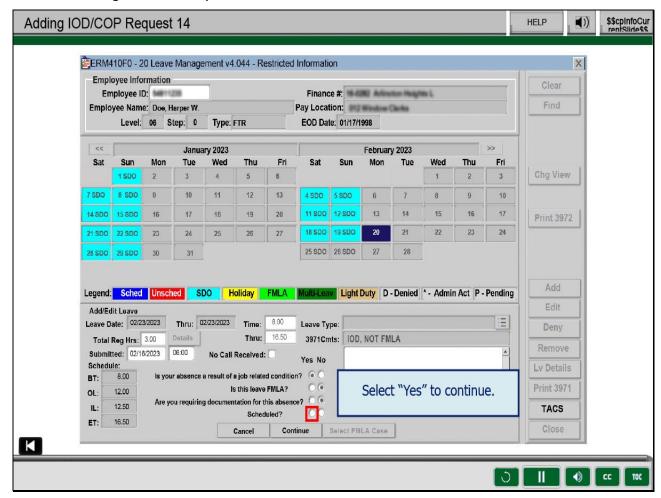
Slide 18 - Adding IOD/COP Request 13



Answer "No" to the question,

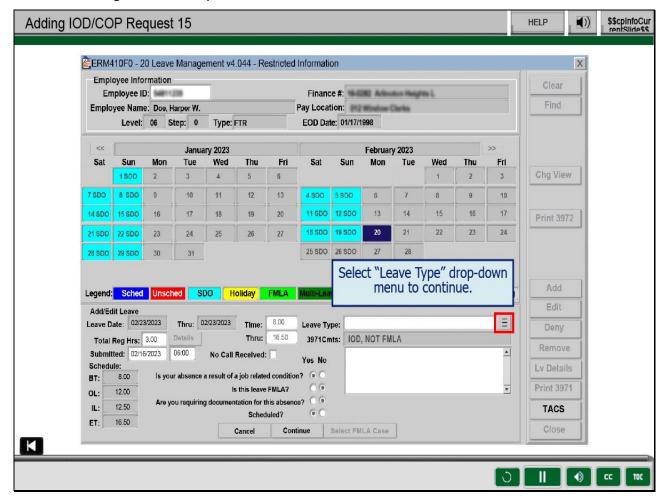
"Are you requiring documentation for this absence?"

Slide 19 - Adding IOD/COP Request 14



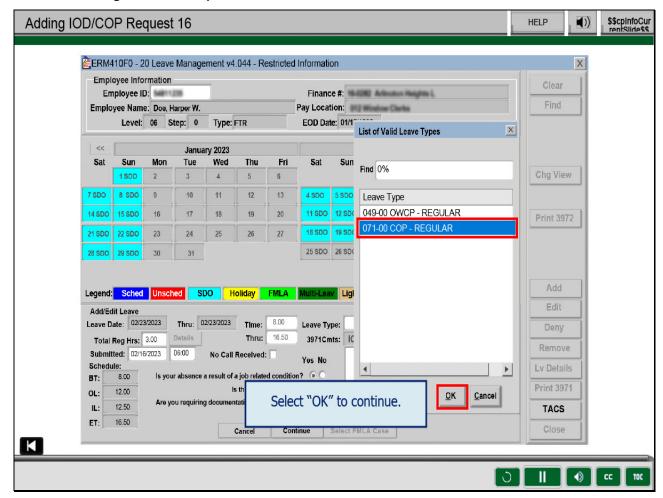
Answer "Yes" to the question, "Scheduled?"

Slide 20 - Adding IOD/COP Request 15



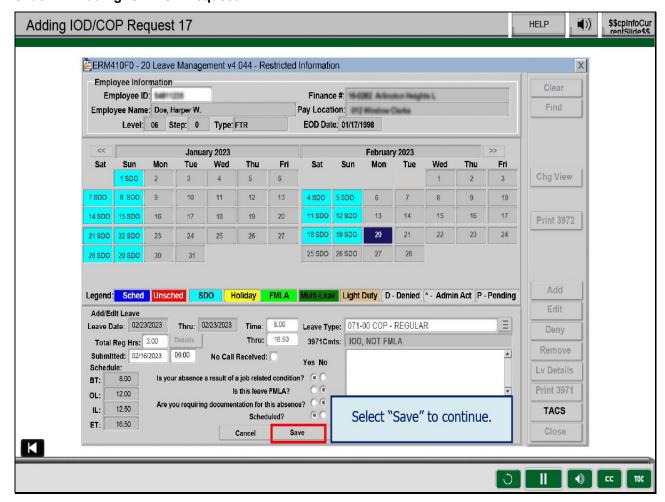
Next, add the leave type by selecting the "Leave Type" drop-down menu.

Slide 21 - Adding IOD/COP Request 16



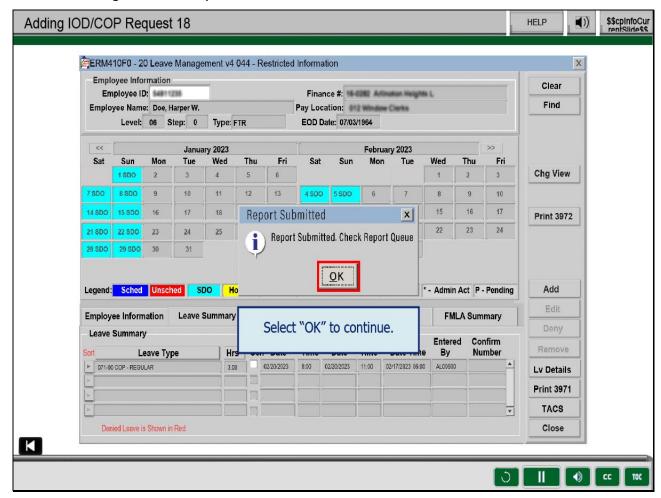
Select "071-00 COP - REGULAR," then select "OK."

Slide 22 - Adding IOD/COP Request 17



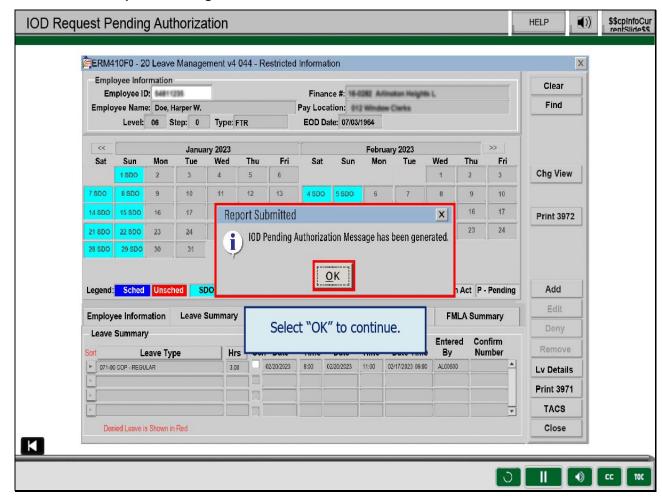
Review the data on the screen to verify it is correct, then select "Save."

Slide 23 - Adding IOD/COP Request 18



Select "OK" for "Report Submitted. Check Report Queue" pop-up.

Slide 24 - IOD Request Pending Authorization



The pop-up "IOD Pending Authorization Message has been generated," displays.

Note: The message is generated to a Human Resource Management (HRM) Specialist.

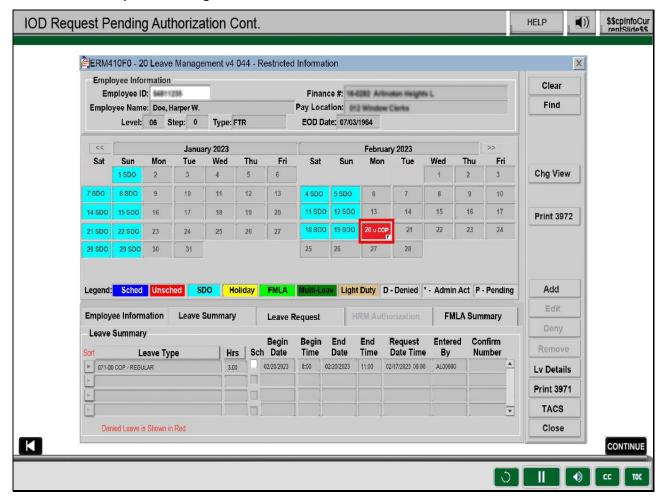
Once the IOD request has been Approved or Denied by HRM,

Local Management will receive an IOD Pending Approval or Denial message in eRMS

that they will need to be responded to in order to complete the approval or denial.

Select "OK."

Slide 25 - IOD Request Pending Authorization Cont.



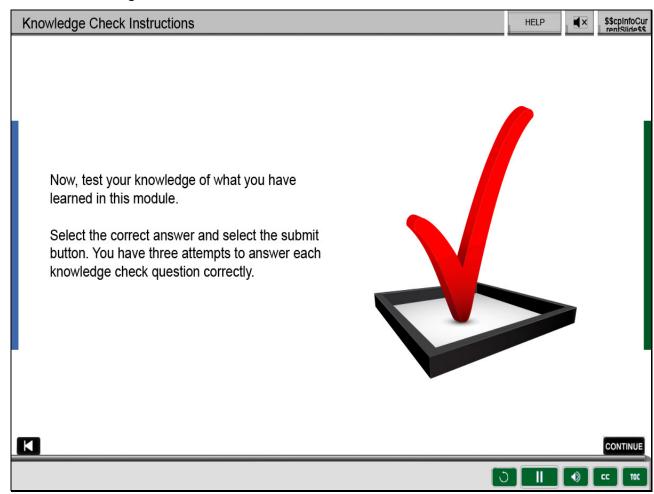
The Leave Management screen calendar displays a white box

containing a "P" for each day associated with the pending IOD Leave request.

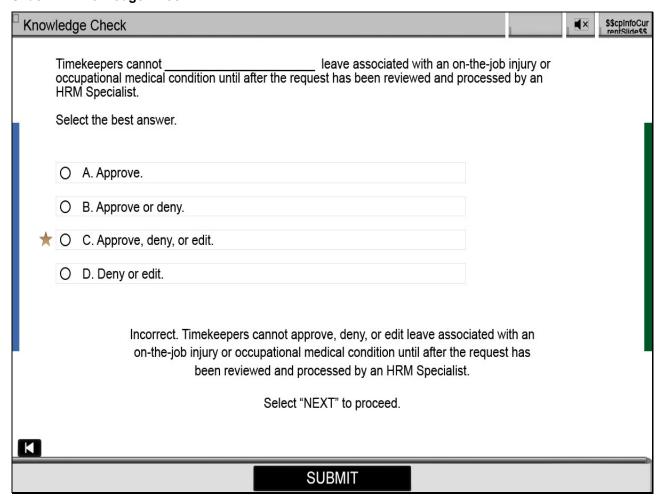
The "P" indicates that the IOD Leave is pending

authorization by an HRM Specialist. Select "Continue."

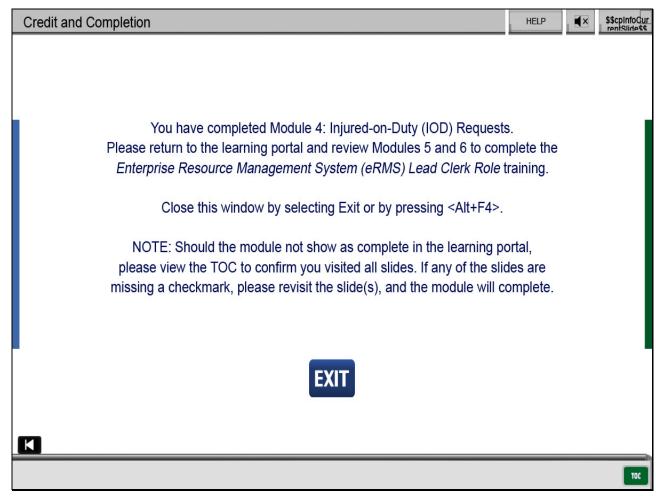
Slide 26 - Knowledge Check Instructions



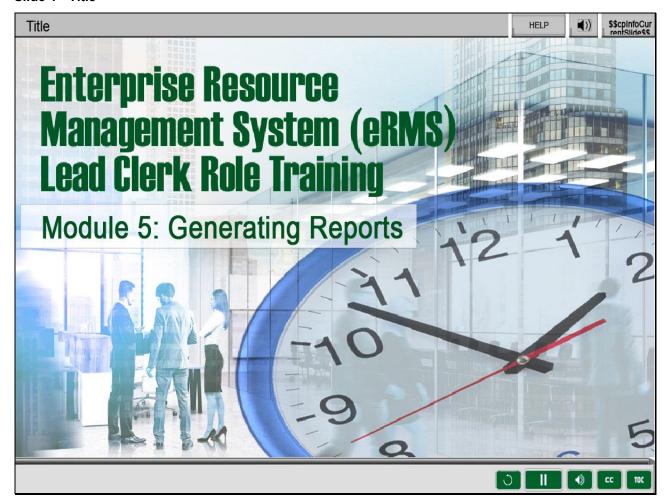
Slide 27 - Knowledge Check



Slide 28 - Credit and Completion



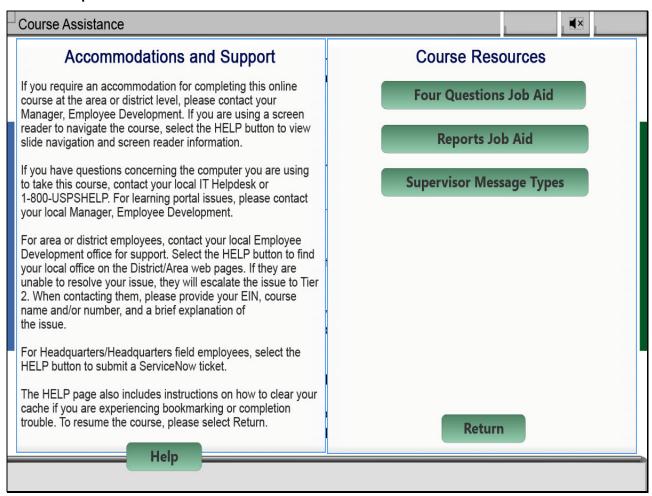
Slide 1 - Title



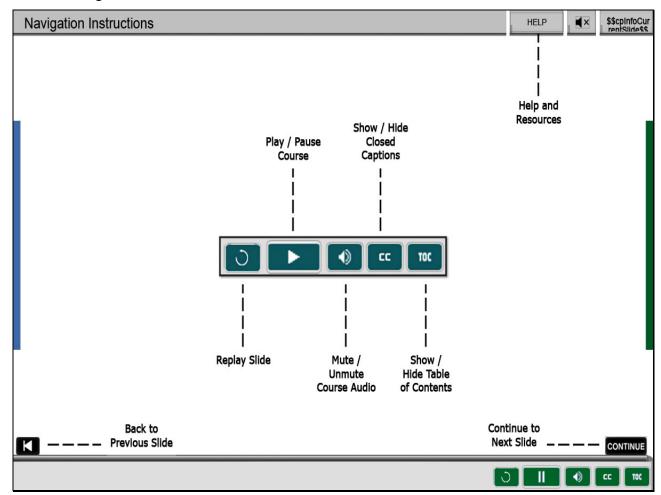
Welcome to Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 5, Generating Reports.

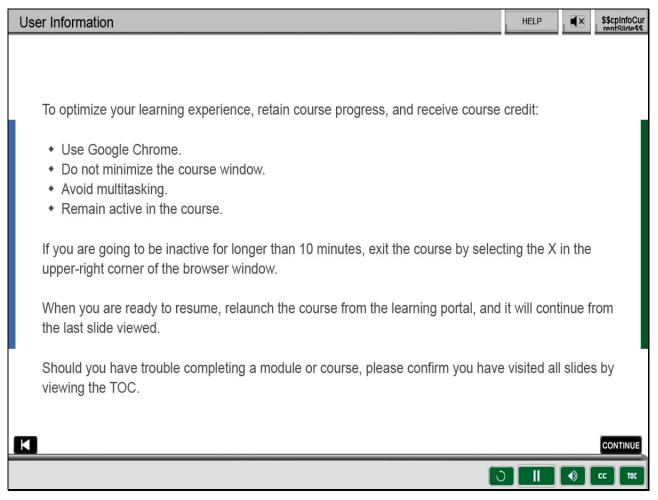
Slide 2 - Help



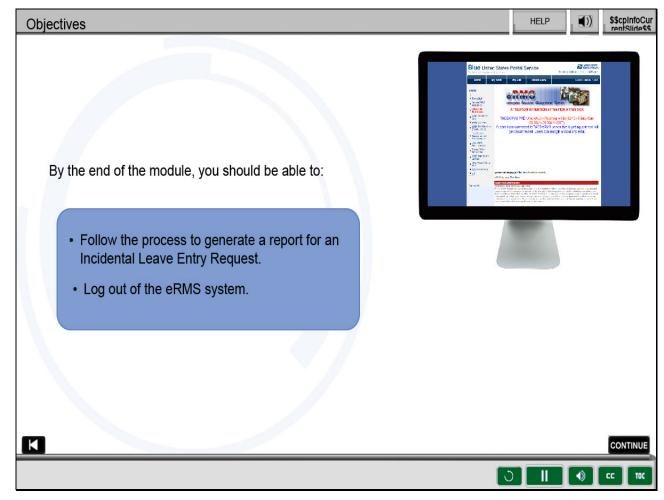
Slide 3 - Navigation Instructions



Slide 4 - User Information



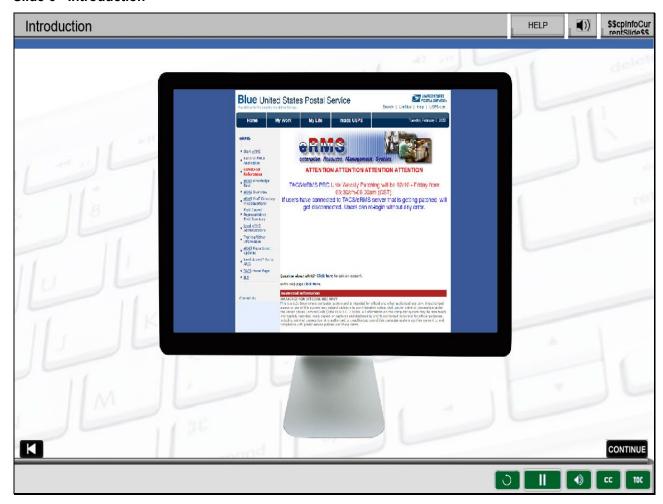
Slide 5 - Objectives



By the end of this module, you should be able to follow the process to generate

an Incidental Leave Entry Request Report and log out of the eRMS system.

Slide 6 - Introduction



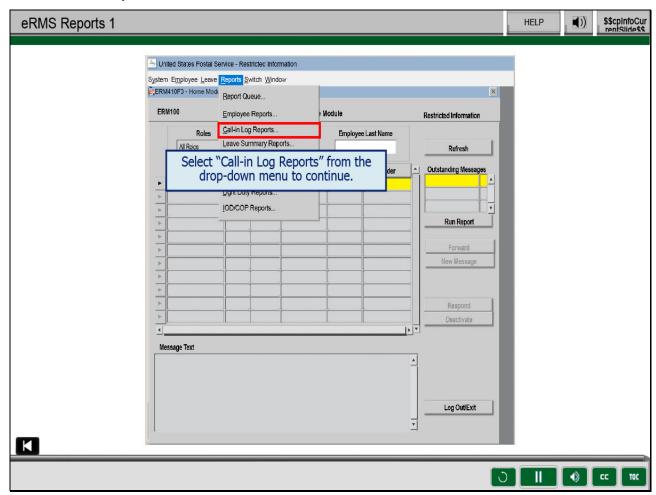
Slide notes

Now that you have learned how to navigate the eRMS Leave Management screen,

we will discuss how to run and view an Incidental Leave Entry Report.

This report provides you with all leave entries made under your ACE ID.

Slide 7 - eRMS Reports 1



Slide notes

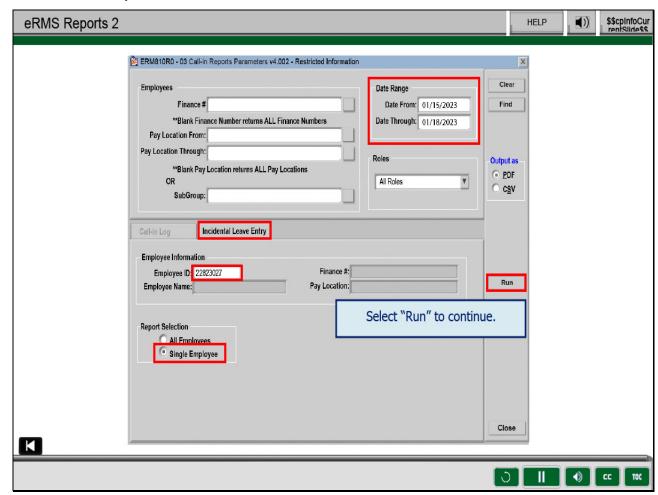
Your manager has requested that you provide a report for all

the leave you entered for the past week.

To begin, go to Reports on the eRMS Main menu.

Select "Call-in Log Reports."

Slide 8 - eRMS Reports 2



Slide notes

On the Incidental Leave Entry tab, enter the criteria you wish to use.

If you do not enter any criteria, the report will be ran for all

employees in all the finance numbers and pay locations you have access to.

A search can be conducted by a single employe, all employees,

by finance number, or by pay location.

Shown here is an example of the fields you would enter

to run the report for a single employee.

Enter the dates you would like to use for your search

in the "Date Range" fields.

Enter the date of the first day of your search range

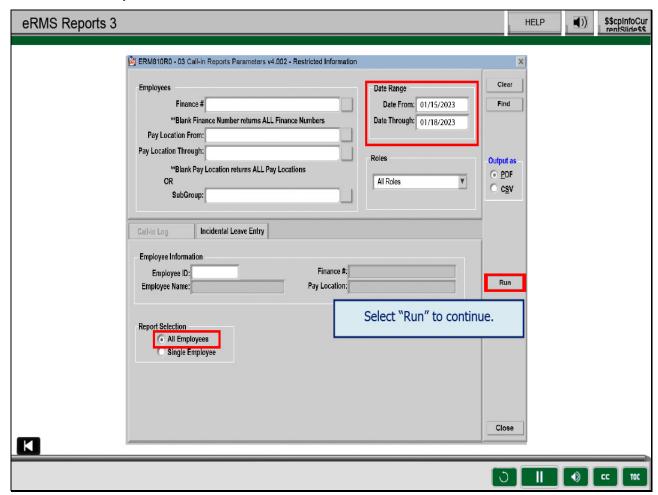
in the "Date From" field and the last day of your

search in the "Date Through" field.

Select the radio button for "Single Employee" and enter the EIN,

then select "Run" to generate the report and send it to your Report Queue.

Slide 9 - eRMS Reports 3



Slide notes

Since your manager has requested a report for all the leave you entered

for the last week, you need to run the report for all employees.

Enter the date range for the report,

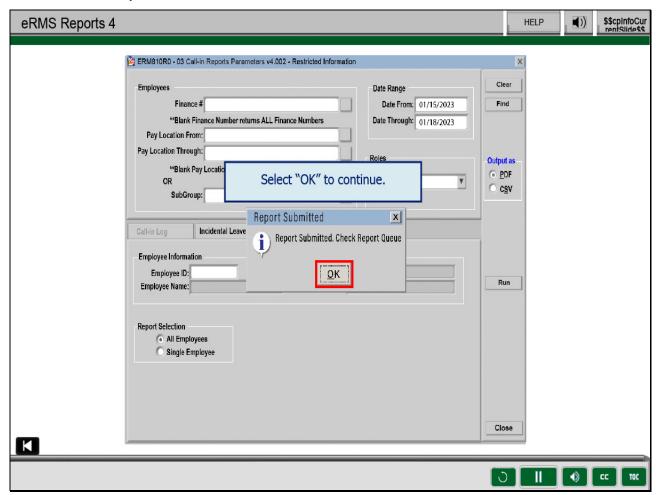
select the radio button for "All Employees," then select "Run."

Note: If you have access to multiple finance numbers,

and you only want to run the report for employees in one installation,

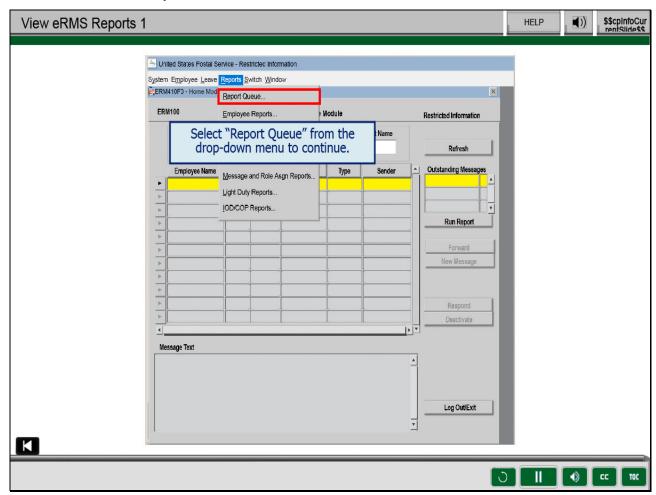
you will need to enter the finance number of that installation in the "Finance #" field.

Slide 10 - eRMS Reports 4



Click "OK" to the pop up stating "Report Submitted, Click Report Queue".

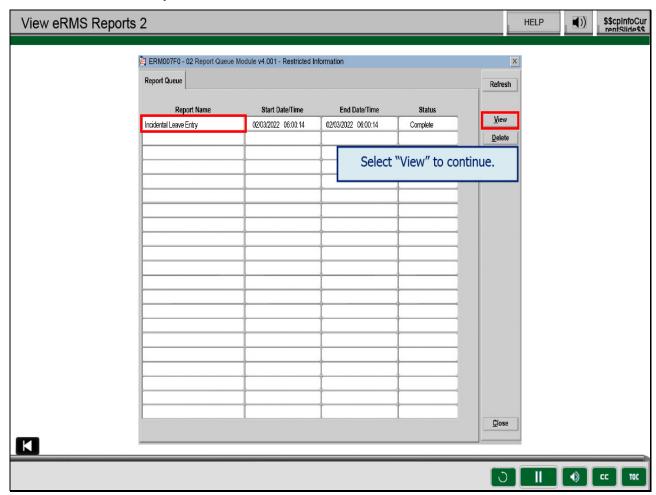
Slide 11 - View eRMS Reports 1



To view your report, select the "Reports" drop-down menu.

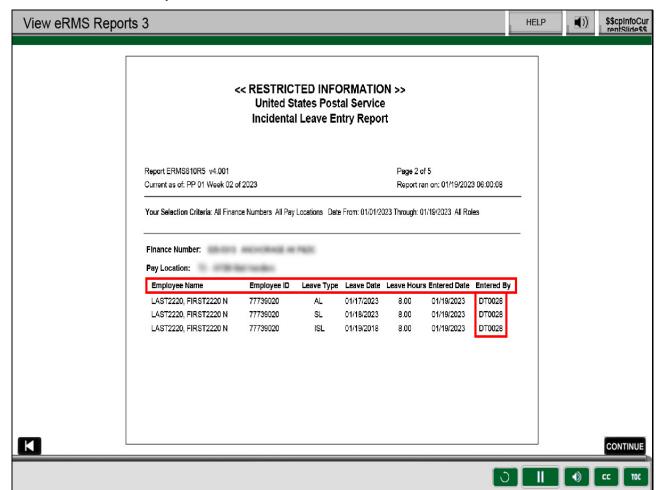
Select "Report Queue."

Slide 12 - View eRMS Reports 2



Select the report name then select "View" to open the report.

Slide 13 - View eRMS Reports 3



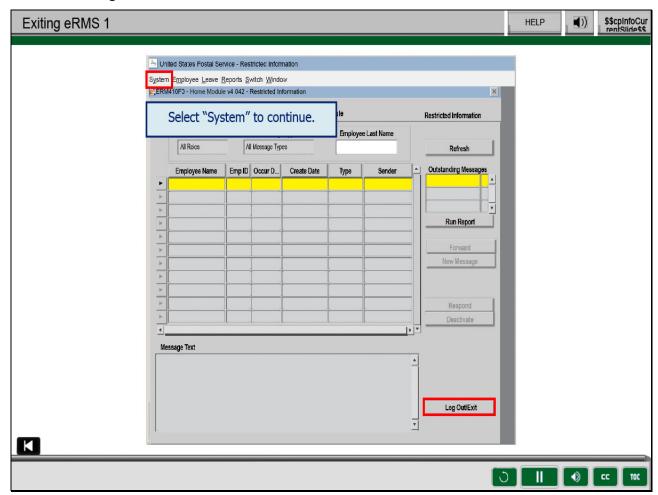
The report includes the following fields Employee Name, Employee ID,

Leave Type, Leave Date, Leave Hours, Entered Date, and Entered By.

Please Note: The report only shows leave entry entered

by the same ACE Login that ran the report.

Slide 14 - Exiting eRMS 1



Now that we have reviewed Incidental Leave reports,

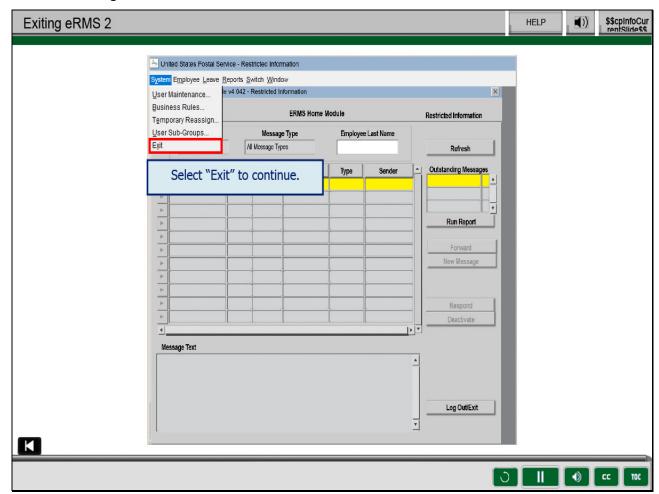
lets wrap up the module with how to exit eRMS and where you can get help.

You can now exit eRMS correctly by selecting "Log Out/Exit"

in the lower-right corner of the screen or by

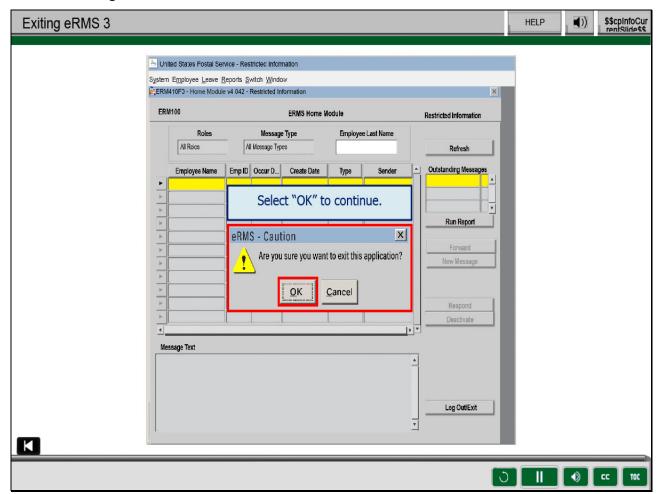
selecting "System" on the Main Menu bar.

Slide 15 - Exiting eRMS 2



On the drop-down menu, select "Exit."

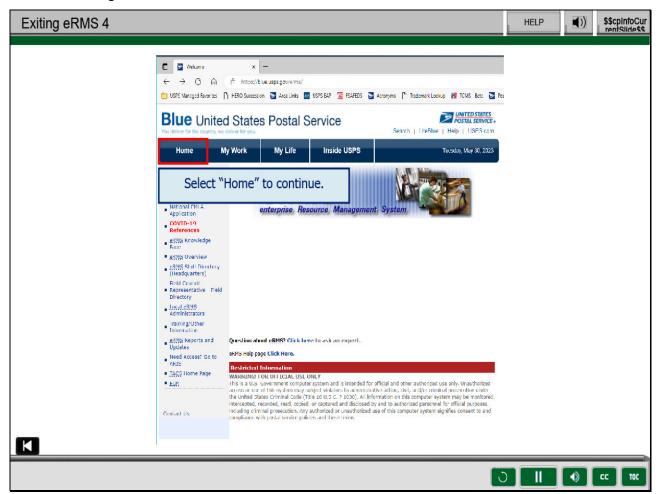
Slide 16 - Exiting eRMS 3



A pop-up screen displays "Are you sure you want to exit the application?"

Select "OK."

Slide 17 - Exiting eRMS 4

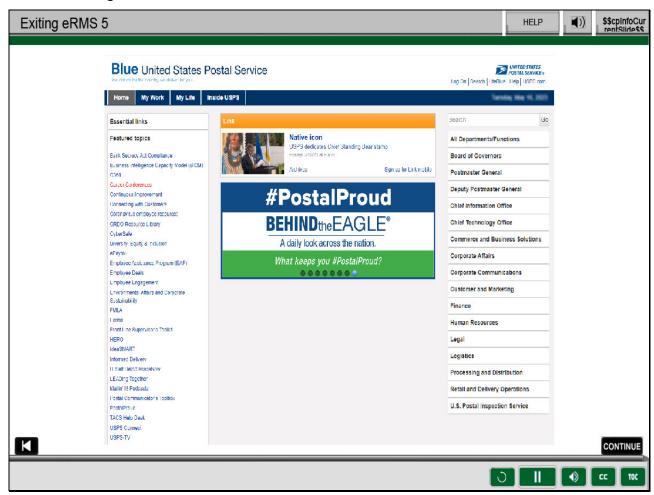


Slide notes

You will be returned to the eRMS webpage.

Once at the eRMS webpage, select "Home."

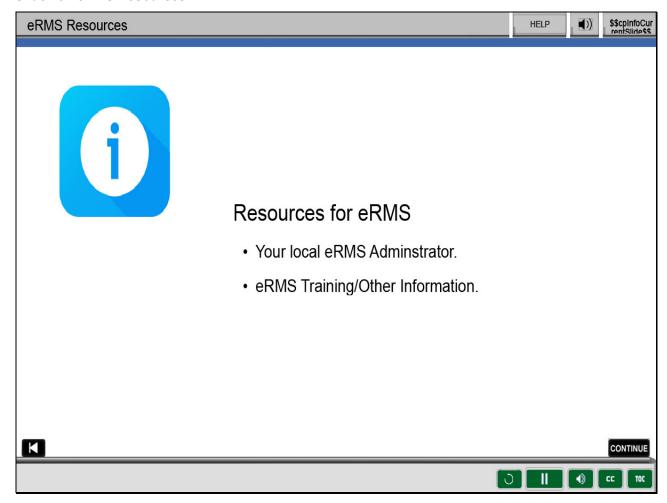
Slide 18 - Exiting eRMS 5



Now you are returned to the Blue Page where we started.

Next, let's discuss how to get help.

Slide 19 - eRMS Resources



Slide notes

When you need help, your first resource should be your local eRMS administrator.

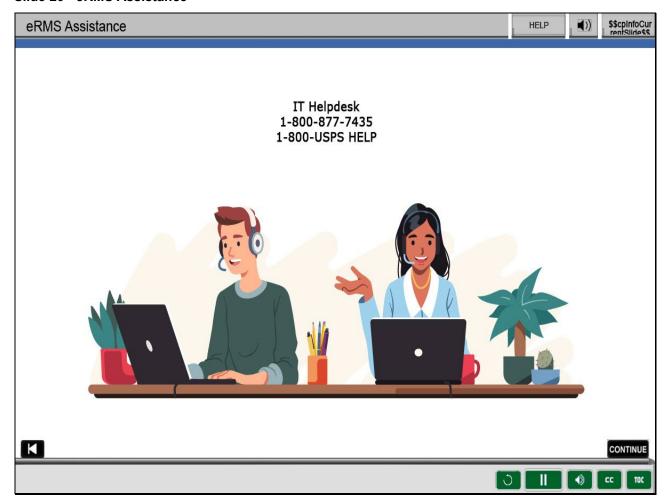
Remember, the eRMS administrator will need detailed information to better assist you.

There are other types of assistance available.

If the question involves how to do something, the eRMS Training/Other Information

and eRMS Help pages can be accessed from the eRMS Homepage.

Slide 20 - eRMS Assistance

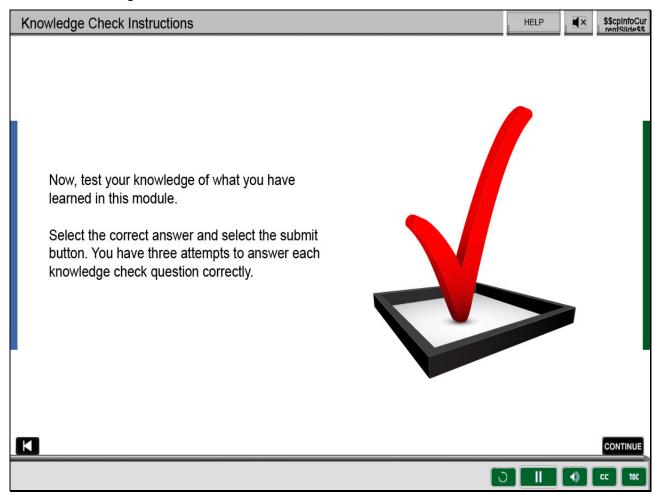


Slide notes

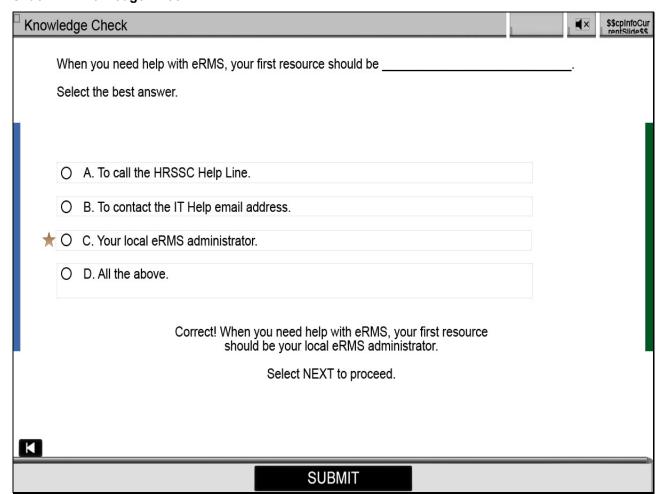
If the eRMS application is not functioning properly,

contact the IT Helpdesk at 1-800-877-7435 or 1-800 USPS HELP.

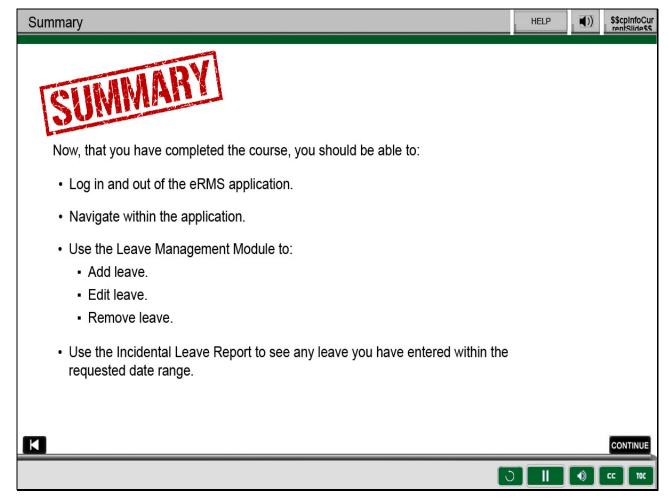
Slide 21 - Knowledge Check Instructions



Slide 22 - Knowledge Check



Slide 23 - Summary



Slide notes

Now, that you have completed the course, you should be able to:

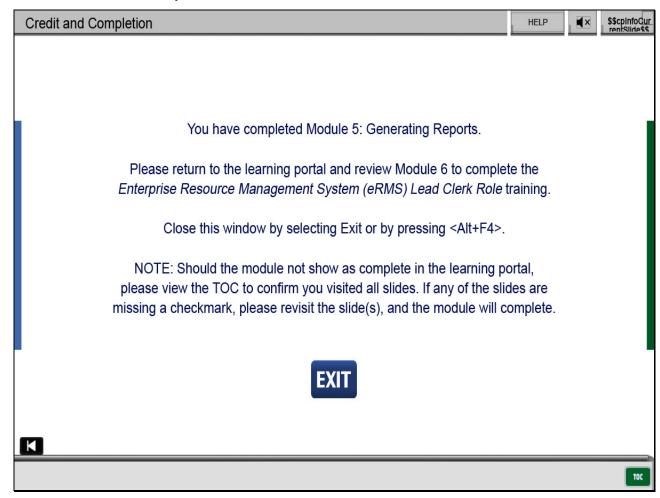
Log in and out of the eRMS application.

Navigate within the application.

Use the Leave Management module to add leave, edit leave, remove leave.

Use the Incidental Leave Report to see any leave you have entered within the requested date range.

Slide 24 - Credit and Completion



Slide 1 - Title Page



Welcome to the Enterprise Resource Management System (eRMS) Lead Clerk Role,

Module 6, Assessment.

Slide 2 - Help

Accommodations and Support

If you require an accommodation for completing this online course at the area or district level, please contact your Manager, Employee Development. If you are using a screen reader to navigate the course, select the HELP button to view slide navigation and screen reader information.

If you have questions concerning the computer you are using to take this course, contact your local IT Helpdesk or 1-800-USPSHELP. For learning portal issues, please contact your local Manager, Employee Development.

For area or district employees, contact your local Employee Development office for support. Select the HELP button to find your local office on the District/Area web pages. If they are unable to resolve your issue, they will escalate the issue to Tier 2. When contacting them, please provide your EIN, course name and/or number, and a brief explanation of the issue.

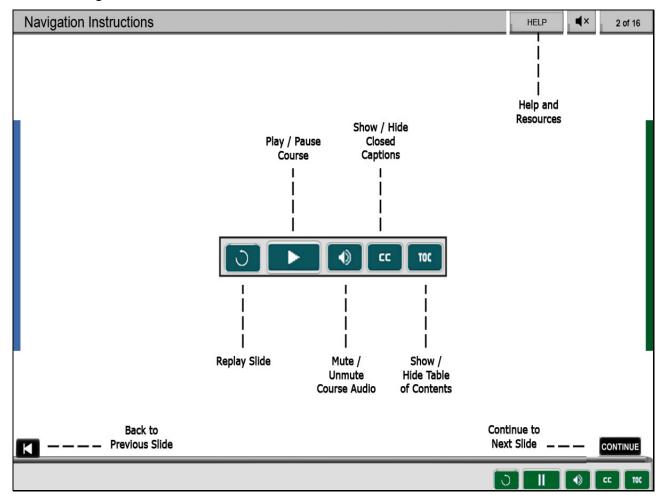
For Headquarters/Headquarters field employees, select the HELP button to submit a ServiceNow ticket.

The HELP page also includes instructions on how to clear your cache if you are experiencing bookmarking or completion trouble. To resume the course, please select Return.

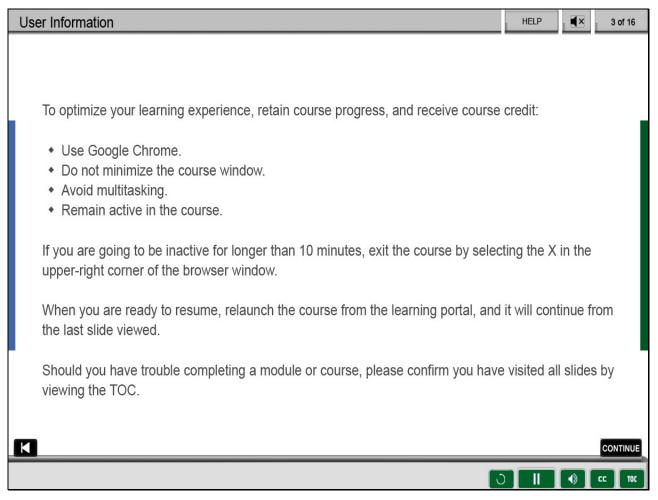
Help page on Blue

Course Resources Four Questions Job Aid Reports Job Aid Supervisor Message Types Return

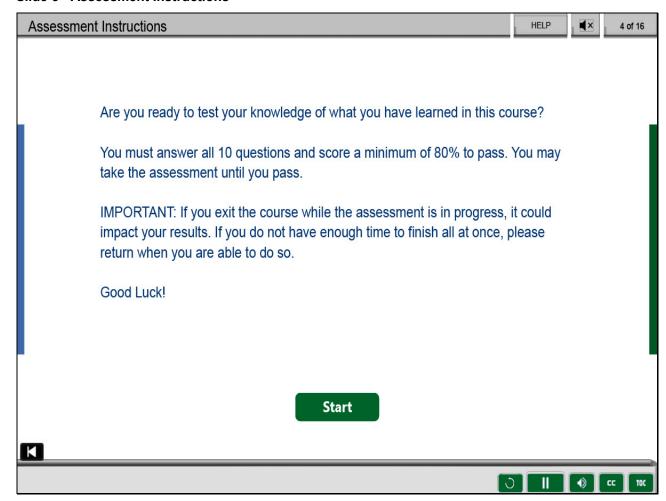
Slide 3 - Navigation Instructions



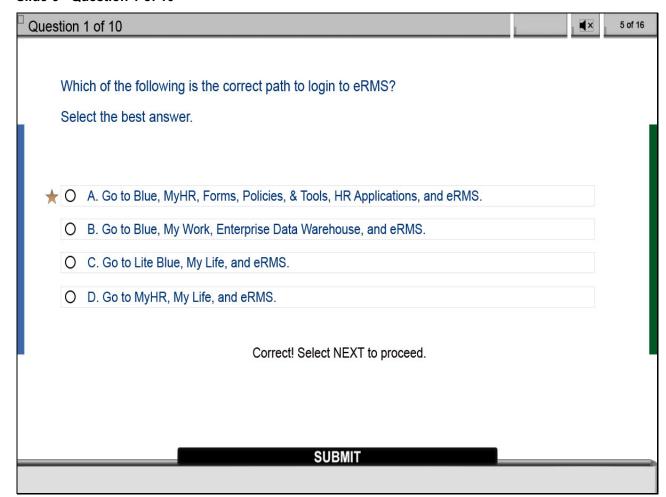
Slide 4 - User Information



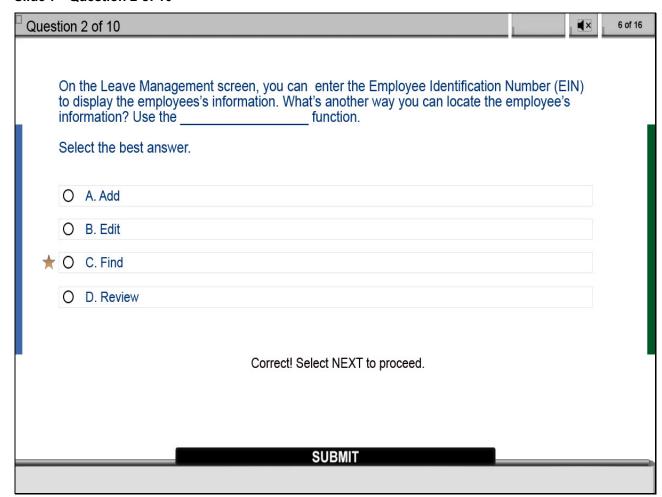
Slide 5 - Assessment Instructions



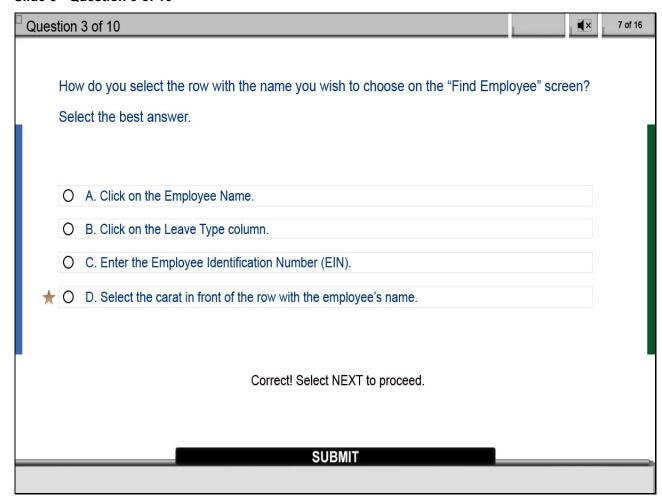
Slide 6 - Question 1 of 10



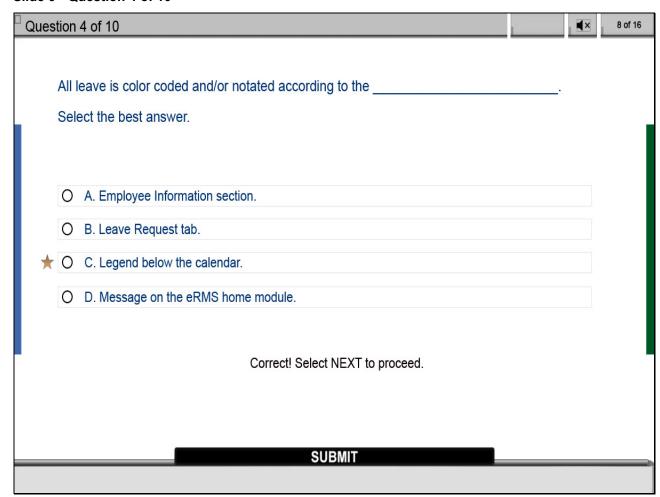
Slide 7 - Question 2 of 10



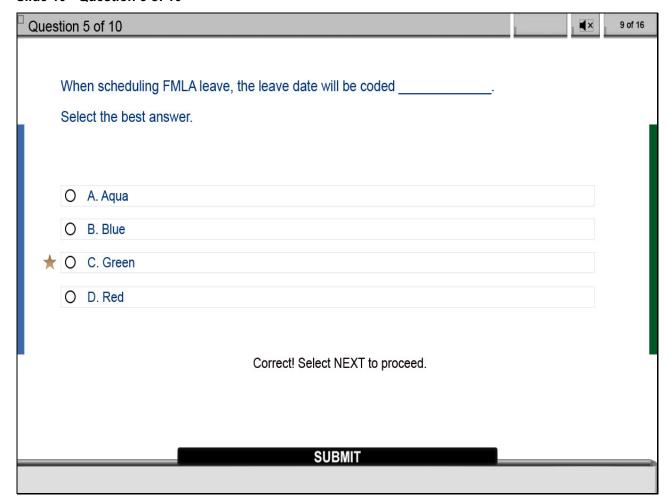
Slide 8 - Question 3 of 10



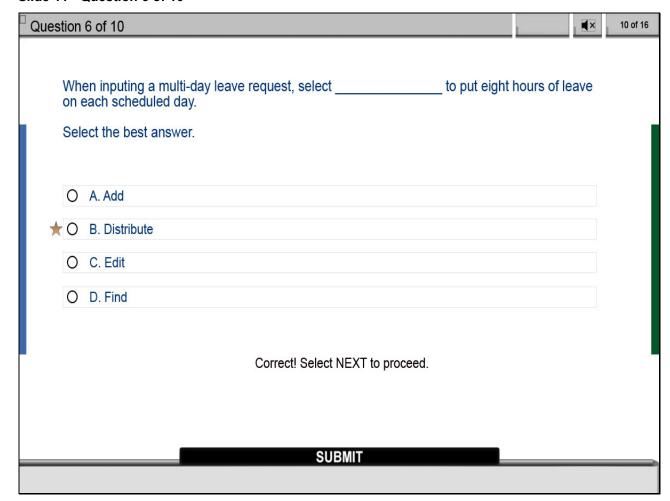
Slide 9 - Question 4 of 10



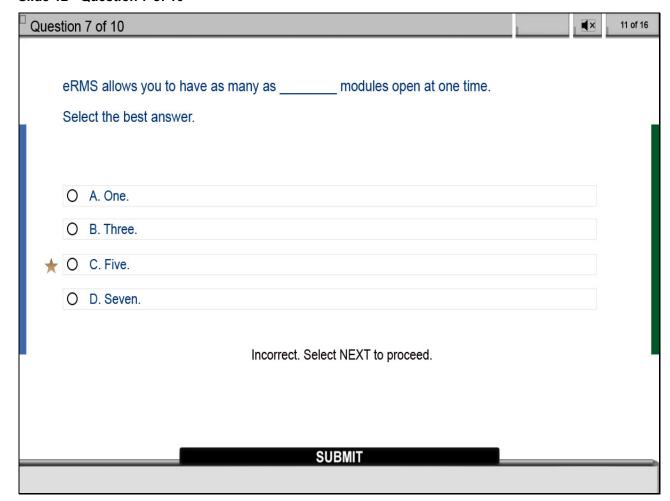
Slide 10 - Question 5 of 10



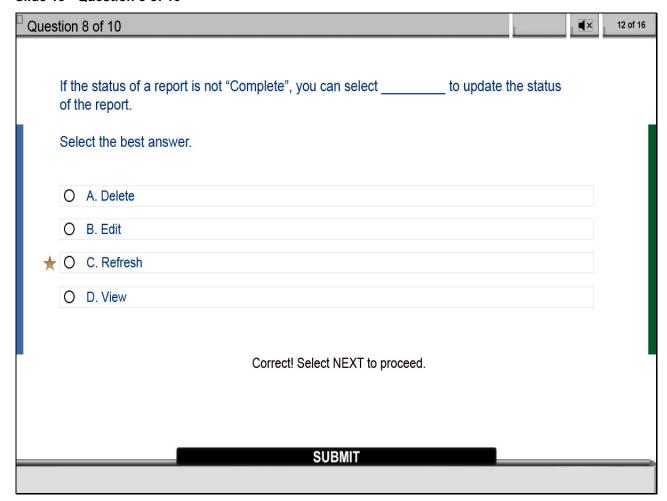
Slide 11 - Question 6 of 10



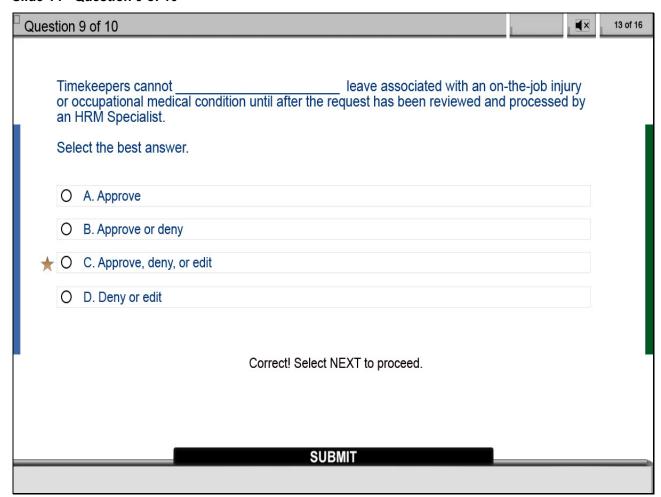
Slide 12 - Question 7 of 10



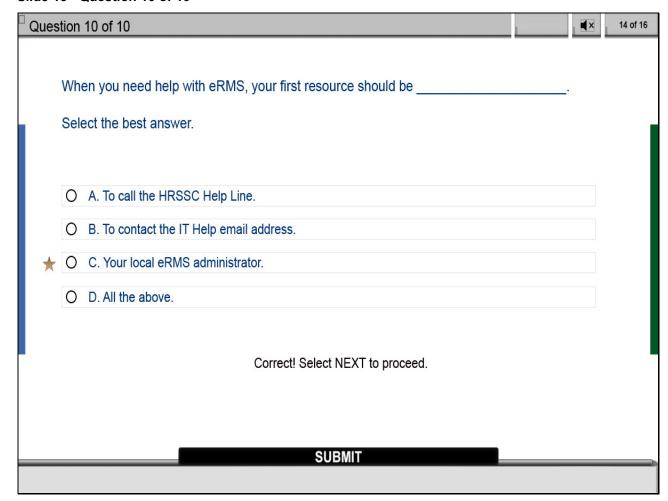
Slide 13 - Question 8 of 10



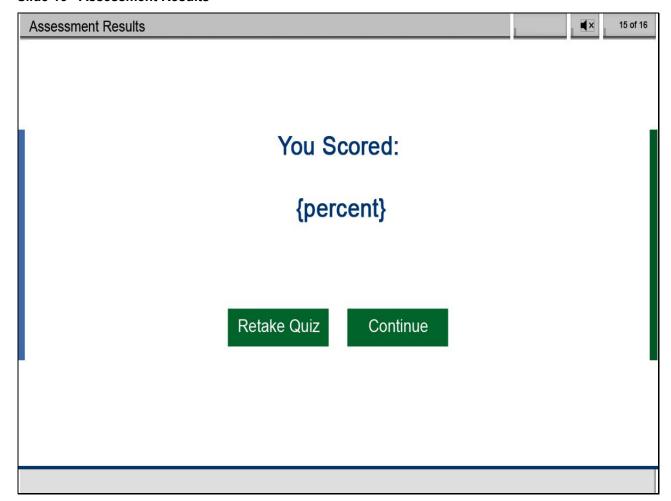
Slide 14 - Question 9 of 10



Slide 15 - Question 10 of 10



Slide 16 - Assessment Results



Slide 17 - Course Completion

