

# **LEAD CLERKS**

## **MOU Re: Clerk Craft Jobs**

**2010 – 2015**

**USPS / APWU**

**National Agreement**



# National Agreement with APWU

## □ Intent

- **To provide oversight, direction and support, in the absence of Supervisory presence to bargaining unit employees in both Mail Processing and Retail operations.**



# National Agreement with APWU

## □ Intent

- **The establishment of Lead Clerk positions is directly linked to the new restrictions on the use of 204-B work hours in the clerk craft, in accordance with Section 2.D of the Clerk Craft Jobs MOU.**
- **No later than June 1, 2012 eliminate the usage of 204-B's except in absence or vacancy of a supervisor for 14 days or more.**

## **Where**

- **In any facilities where clerks work without direct supervision (Mail Processing/Customer Service)**
- **In facilities that have a minimum complement of five (5) clerks.**
- **In facilities with only a Retail Operation**

## **□ How Many**

- **Ratio based on facility clerk craft complement**
  - ◆ **5 to 49 clerks – 1**
  - ◆ **50 to 99 clerks – 2**
  - ◆ **100 to 199 clerks – 3**
  - ◆ **200 to 499 clerks – 5**
  - ◆ **500 or more clerks – 5 plus 1 for each additional 100 clerks**
- **COMPLEMENT NEUTRAL**

## NATIONAL SUMMARY

F1		
AREA	Total Clerks	Lead Clerk Est
CAPITAL METRO	6329	112
EASTERN	8873	160
GREAT LAKES	7756	130
NORTHEAST	9078	143
PACIFIC	7016	107
SOUTHWEST	10154	179
WESTERN	10544	193
<b>TOTAL</b>	<b>59750</b>	<b>1024</b>

Need to create:  
**F1=1024**  
**F4=2873**  
**Total=3897**

F4			
AREA	Total Clerks	Lead Clerk Est	Lead Clerk Jobs to be created
CAPITAL METRO	7652	561	239
EASTERN	10858	745	370
GREAT LAKES	8595	596	328
NORTHEAST	12930	945	569
PACIFIC	8569	629	364
SOUTHWEST	13543	1014	598
WESTERN	12273	831	405
<b>TOTAL</b>	<b>74420</b>	<b>5321</b>	<b>2873</b>

## DISTRICT SUMMARY

Function 4			Function 1		
	<b>SOM 0</b>	<b>7</b>		<b>MLS</b>	<b>5</b>
	<b>SOM 1</b>	<b>9</b>		<b>MID</b>	<b>3</b>
	<b>SOM 2</b>	<b>14</b>		<b>MVDDC</b>	<b>2</b>
	<b>SOM 3</b>	<b>17</b>		<b>SB P&amp;DC</b>	<b>5</b>
	<b>SOM 4</b>	<b>15</b>			
<b>Total</b>		<b>68</b>			<b>15</b>



# Reclassification

**Incumbents of the following positions will be reclassified as Lead Sales & Services Associate effective May 19, 2012.**

- Lead Sales & Services Associate, occupation code **2320-0004**
- Clerk Finance Station, occupation code **2320-05xx**
- Window Service Technician, occupation code **2320-29xx**

**No local action is necessary to initiate the personnel actions for incumbents.**

- ❑ Identify duty assignment: *(To remain complement neutral) See Spreadsheet including schedule, PAA, etc***
  
- ❑ Position Numbers for these new positions being requested via request to HRSSC. *See Spreadsheet***
  
- ❑ Post the positions in automated bid offices and manual bid offices in the very next cycle to ensure awards are effective 6/2/2012 for as many as possible.**



# Action Required

- The Lead Clerk position is filled on senior qualified basis.**
- Evaluate schedules of all clerk positions include any vacancies including residuals.**
- Determine which clerk position there is a business need to abolish or revert.**
- If occupied incumbent in the abolished position becomes UAR.**
- If vacant – revert (follow District SOP)**
- Prepare to Post Lead Clerk Position:**
  - Contact local APWU and send copy of position.**
  - LMOU may require specific number of days to allow for input before posting – ensure meet requirement.**



# Action Required

- Post the Lead Clerk position installation wide.**
- Check for retreat rights via DCC – if appropriate send bid.**
- Evaluate vacancy created by successful bidder for potential posting/reversion using District SOP.**
- If no one bids and UAR is qualified for position – can assigned via 37.4.C.5**
- If filled by retreat rights or via 21-day posting, may need to excess or reassign junior regular clerk craft employee.**
- If not filled, may need to be withheld using District SOP.**



# Lead Clerk Positions

## ☐ Reference

- National Agreement EL 912 pg 376
- Lead Clerk Q & A's dated 5-4-2012
- Q&A's dated 6-28-2011
- Job Descriptions available on JD Online at <http://hrishq.usps.gov/jdonline/>
- Handbook EL-312 Employment & Placement
  - ◆ (Sections 728 and 233.11)
  - ◆ PS Form 1796-A (used if 5 senior bidders have been requested to address qualifications on Form 991)

## Reference

- Lead Mail Processing Clerk, P7-7**
  - Occupation Code: 2315-7153
- Lead Sales & Services Associate, P7-7**
  - Occupation Code: 2320-0009
- Lead Customer Service Clerk, P7-7**
  - Occupation Code: 2320-0008

**QUESTION: How will the Lead Clerk duty assignments be created? (5/4/12 Q&A#1)**

**ANSWER: They will be newly created duty assignments posted for bid installation wide to the senior qualified bidder, in accordance with Article 37.**

**QUESTION: At what level will the Lead Clerk duty assignments be created? (5/4/12 Q&A#2)**

**ANSWER: They will be created at one level above other employees in the group.**

**QUESTION: Will the Lead Clerk have access to TACS records (clock rings) and can they make adjustments? (5/4/12 Q&A#3)**

**ANSWER: Yes, with the approval of the supervisor. The supervisor must still authorize employee time using the TACS application in all sites where it is available. Current difference with HQ TACs**

**QUESTION: Will the Lead Clerk duty assignment have a principal assignment area? (5/4/12 Q&A#4)**

**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.**

**QUESTION: How will the Lead Clerk be scheduled for overtime, holiday scheduling, leave, etc.? (5/4/12 Q&A#5)**

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

**QUESTION: Can the Lead Clerk issue discipline or approve leave? (5/4/12 Q&A#6)**

**ANSWER: No.**



**QUESTION: Is the ratio of Lead Clerk assignments in the clerk craft complement in a facility based on the entire facility or by tour? (5/4/12 Q&A#7)**

**ANSWER: Facility clerk complement**

**QUESTION: If there are five clerks in any facility, must a Lead Clerk duty assignment be created? (5/4/12 Q&A #8)**

**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.”***

**QUESTION: Will Lead Clerk duty assignments be created in facilities where clerks work without direct supervision, even if there are less than five clerks? (5/4/12 Q&A#9)**

**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...*”**

**QUESTION: 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? (5/4/12 Q&A#11)**

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

**QUESTION: How will higher level details be made to the Lead Clerk duty assignment?  
(5/4/12 Q&A#12)**

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



# Lead Clerk Positions

**QUESTION: What happens if as a result of an excessing event a clerk facility's complement changes? (5/4/12 Q&A#13)**

**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.**

**QUESTION: May the USPS create more Lead Clerk assignments than the ratio listed in the MOU? (5/4/12 Q&A#14)**

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

**QUESTION: 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? (5/4/12 Q&A#15)**

**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.**

**QUESTION: Is there a difference between the LSSA and the Lead Customer Service Clerk (LCSC)? (5/4/12 Q&A#16)**

**ANSWER: Yes. The LSSA is utilized in a Function 4 facility with a retail/window operation. The LCSC will normally be utilized in a Function 4 facility that has no window/retail operation. In a large facility with both retail and distribution, you could have both based on operational needs and the MOU ratio.**

**QUESTION: Are there any other current Level 7 clerk positions that can be grandfathered into Lead Clerk positions? (5/4/12 Q&A#17)**

**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.**

**QUESTION: Can Lead Clerk positions be posted as Non-Traditional Full-Time (NTFT) duty assignments? (5/4/12 Q&A#18)**

**ANSWER: Yes, provided they are posted in accordance with the NTFT Duty Assignments MOU.**

**QUESTION: What training & testing requirements will there be for the Lead Clerk positions? (5/4/12 Q&A#19)**

**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.**

**QUESTION: How will Lead Clerks be selected? (6/28/11 Q&A#60)**

**ANSWER: Lead Clerk positions will be posted as senior-qualified duty assignments. Clerk Craft employees are eligible to bid on these assignments.**

**QUESTION: Will LSSA's be grandfathered into Lead clerk duty assignments? (6/28/11 Q&A#61)**

**ANSWER: Employees currently occupying LSSA duty assignments will be administratively converted into Lead Clerk duty assignments without reposting unless there are more LSSA's than the number of Lead Clerks provided for in the MOU.**

**QUESTION: What if there are currently more LSSA's than the number of Lead Clerk positions provided for in the MOU? (6/28/11 Q&A#62)**

**ANSWER: The minimum number of Lead Clerks, to be assigned by seniority, is determined in Section 2.C of the Clerk Craft Jobs MOU. The Employer may create additional Lead Clerk duty assignments based on operational need.**

**QUESTION: Will LSSA's who do not receive a Lead Clerk position be entitled to saved grade? (6/28/11 Q&A#63)**

**ANSWER: Yes. LSSA's who do not receive a Lead Clerk duty assignment will become unencumbered and receive saved grade pursuant to 37.4.C.6.**

**QUESTION: Is the exception intended to be 14 calendar days or 14 work days and must they be consecutive days? (10/20/11 Q&A#20)**

**ANSWER: It is intended to be a period of 14 or more consecutive calendar days (two weeks or more).**

**QUESTION: Must the same 204-B be utilized for the entire two week period? (10/20/11 Q&A#21)**

**ANSWER: No. The 14 day period refers to the absence or vacancy of the supervisor.**

**QUESTION:** Beginning June 1, 2012, 204-B's may only be utilized during the absence or vacancy of a supervisor for 14 days or more and this use is limited to no more than 90 days. Could a different 204-B be utilized for a second 90 day period once the first 204-B (or several 204-B's) completed the initial 90 day assignment? [\(10/20/11 Q&A#22\)](#)

**ANSWER:** No. The vacancy or absence is normally limited to one 90 day period. Exceptions would only be appropriate in very limited situations (e.g., supervisor on 4 months maternity leave; supervisor on 6 months military leave; or similar situations).



# QUESTIONS

