

## Clerk Upgrades Coming in March

Effective March 18, 2006 all Air Records Processors, PS-05 will be upgraded to Level 6, all TACS Time and Attendance Clerks, PS-05 will be upgraded to Level 6 and all Ramp Clerks, PS-06 will be upgraded to Level 7. In addition, all Bulk Mail Clerks, PS-05 will be upgraded to Level 6 Bulk Mail Clerk.

None of the incumbents who hold duty assignments under these position descriptions will have their duty assignments reposted since the upgrades were part of a negotiated and ratified extension to the Collective Bargaining Agreement.

### Affect of Bulk Mail Clerk Upgrade on Window Clerks

Their Standard Position Description states that a Bulk Mail Clerk **“accepts, classifies, and computes the chargeable postage on second- or third-class mail matter or both.”**

Bulk Mail Clerks, who normally work in Bulk Mail Acceptance Units, must attend a three-week training and testing regimen at the Academy in Norman, Oklahoma in order to become the successful bidder.

The Postal Service has also recognized in its Business Mail Acceptance Training for Associate Offices Study Guide Course #23201-09 that **“there are thousands of Postal Workers whose duties and responsibilities include the acceptance of business mailings but who are not required to attend the Academy.”**

The Standard Position Description of all Sales and Services Associates(SSA), PS-05, Sales, all Services and Distribution Associates(SS&DA), PS-05 and all Lead Sales and Services Associates(LSSA), PS-06 states they **“may verify presort and bulk mailings of all classifications, computing and maintaining on a current basis mailers’ credit balances.”**

Effective March 16, 2006, any employees who performs these duties will be performing Level 6 work when they accept and verify business mailings.

The Postal Service and the Clerk Division entered into a series of Questions and Answers on how to apply the National Agreement after the effective date of the upgrade in order to preclude grievances over higher level work assignments and to provide for the establishment of mixed duty assignments with work in two separate pay levels.

The Q&A was signed on January 3, 2006 and states that any employee who performs the duties of bulk mail acceptance must be compensated at the PS Level 6 rate.

The parties also agreed that while upgrades for SSAs and SS&DAs will not be automatic as they are for Bulk Mail Clerks, they have also agreed that **“(ELM), Section 233.3 contains the criteria regarding mixed duty assignments. Those criteria must be applied to determine if a particular duty assignment should be abolished and the newly created duty assignment posted at Level 6.”**

The ELM at Part 233.3 requires that a duty assignment be posted at the higher level, in this case Level 6 either:

- **“when a full-time employee is regularly scheduled every workday”** to perform the higher level bulk mail duties, or:
- **“when a full-time employee . . . performs the work of two separate positions in different grades . . . on intermittent days . . . the employee is placed in the position in which more than 50 percent of the time is spent. If the time is equally divided, the employee is placed in the higher grade position.”**

Simply put, if the SSA is accepting bulk mailings on a daily basis, *regardless of the amount of time spent daily*, the duty assignment should be posted as a newly established Level 6 LSSA.

If the SSA is accepting bulk mailings intermittently, but at least 20 hours per week, the duty assignment should also be posted as a newly established Level 6 LSSA.

If the SSA is accepting bulk mailings intermittently but less than 20 hours per week, they should be paid higher level pay for time actually spent on the bulk mailings.

The parties further agreed in the Q&A that when these duty assignments are upgraded by application of 233.3 of the ELM they **“will be upgraded to the position of Lead Sales and Services Associate, Level, PS-06.”**

### Training

The parties also agreed in the Q&A for employees who work in a Bulk Mail Unit that, as in the past, all Bulk Mail Clerks must attend and pass the two-week Bulk Mail Academy Training Program in Norman, Oklahoma. In addition **“employees who relieve [in Bulk Mail Acceptance Units] . . . are also required to take this core training program in its entirety.”** In addition, **“for the purposes of this training program a relief assignment is an assignment in which handling business mail in a relief capacity is indicated in the bid posting.”**

For employees not working or relieving in a Bulk Mail Acceptance Unit but are performing bulk mail acceptance duties 20 or more hours per week they must also attend the Bulk Mail Academy Program in Norman.

If they are working less than 20 hours per week with bulk mailings they are to receive the eight full hours of training described in the Business Mail Acceptance Training for Associate Offices Course 23201-09. This training may be either self-taught or instructor led. There is no pas/fail examination.

### Posting

It is incumbent upon all locals to look closely at all window duty assignments to ensure that clerks are compensated at Level 6 when they are performing bulk mail acceptance duties. It is also imperative to ensure that when upgrades to Level 6 are indicated by application of 233.3 of the ELM the newly created Level 6 duty assignments are posted for bid. It is important to remember that senior employees did not have an opportunity to bid on these higher level duty assignments and some may want an opportunity to increase their pay level for retirement or other purposes. Posting a duty assignment for bid is nothing but the contractual application of seniority and nothing is more important to a Union the seniority for its members.

## Updated Questions and Answers

Bulk Mail Clerk PS-5

To

Bulk Mail Clerk PS-6

Position Description Upgrade

Mixed Duty Assignments

1) Will the existing Bulk Mail Clerk, PS-5, position description be upgraded to the position of Bulk Mail Clerk, PS-6, or to the position of Bulk Mail Technician, PS-6, as a result of the 2005 extension to the 2000-2003 National Agreement between the USPS and APWU dated September 12, 2005.

*The Bulk Mail Clerk, PS-5, position description will be upgraded to Bulk Mail Clerk, PS-6, effective March 18, 2006.*

2) Will the duty assignment of employees encumbered in the Bulk Mail Clerk, PS-5, position description, be posted for bid as a result of the upgrade?

*No. Employees encumbered in Bulk Mail Clerk, PS-5, duty assignments will be upgraded to Bulk Mail Clerk, PS-6.*

3) Do Sales & Services Associates, PS-5; Sales, Services & Distribution Associates, PS-5; and Lead Sales & Services Associates, PS-6, perform bulk mail duties?

*Although bulk mail duties are contained in each of these position descriptions, not all incumbents in duty assignments with these position descriptions perform bulk mail duties. Dependent upon the specific duty assignment, some of the incumbents may be performing bulk mail duties. These position descriptions currently state, "May verify presort and bulk mailing of all classifications, computing and maintaining on a current basis mailers' credit balances."*

4) Will the duty assignment of clerks encumbered under Sales & Services Associate, PS-5; and Sales, Services, & Distribution Associate, PS-5 positions; be automatically upgraded to PS-6?

*No. Employee and Labor Relations Manual (ELM), Section 233.3, contains criteria regarding mixed duty assignments. Those criteria must be applied to determine if a particular duty assignment should be abolished and the newly created duty assignment posted at Level 6.*

5) Will the position of PS-5 clerks encumbered in duty assignments containing relief duties for Bulk Mail Clerk, PS-6, be automatically upgraded to PS-6?

*No. Employee and Labor Relations Manual (ELM), Section 233.3, contains criteria regarding mixed duty assignments. Those criteria must be applied to determine if a particular duty assignment should be abolished and the newly created duty assignment posted at Level 6.*

6) What are the criteria for upgrade and pay regarding mixed duty assignments?

*Employee and Labor Relations Manual (ELM), Section 233.3, contains criteria regarding mixed duty assignments. Those criteria must be applied to determine if a particular duty assignment should be abolished and the newly created duty assignment posted at Level 6.*

7) When an upgrade to PS-6 is appropriate in accordance with Section 233.3 of the ELM, to what PS-6 position will the former PS-5 position be upgraded?

*Duty assignments which meet the criteria in the ELM will be upgraded to the position of Lead Sales & Services Associate, PS-6.*

8) Will a position which is upgraded as a mixed duty assignment be reposted?

*Yes, it will be reposted as a newly established duty assignment. It is newly established because the duty assignment is posted under a different position description. Article 37.3.A.9 does not apply in this instance. The PS-5 duty assignment which was upgraded would be abolished.*

9) What type of Bulk Mail Training is required for Bulk Mail Clerk, PS-6, or those employees who relieve this position?

*Management Instruction **EL-720-2000-6**, "Business Mail Academy Training Program requires senior bidders for Bulk Mail Clerk duty assignments "attend training and ultimately qualify for the position."*

*Language in the step 4 decision dated January, 9, 1997, Case # F90C-4F-C 96018356 would apply. That language states, "Employees who relieve any of the above positions are also required to take this core training program in its entirety."*

*The current core training program is found in Management Instruction (MI) **EL-720-2000-6**, "Business Mail Academy Training Program." This MI also states "For the purposes of this training program a relief assignment is an assignment in which handling business mail in a relief capacity is indicated in the bid posting."*

10) What type of Bulk Mail Training is required for those employees not working or relieving in a Bulk Mail Acceptance Unit, but who are working in a Lead Sales & Services Associate, PS-6 duty assignment, and who normally performs bulk mail acceptance duties on an ad hoc basis less than 20 hours per week?

*By nature, the duties are normally on an ad hoc basis and not near the frequency of that of a Bulk Mail Clerk, PS-6. Language in the step 4 decision dated January 9, 1997, Case # F90C-4F-C 96018356 would apply. That language states, "Employees who are assigned bulk mail acceptance duties on an ad hoc basis should be trained according to their assignments and need not take the entire core." The current training program is "Business Mail Acceptance Training for Associate Offices", Course Number 23201-09, which is intended to be 8 full hours in length. The course may be either self-taught or instructor led. There is no pass/fail examination.*

11) What type of Bulk Mail Training is required for those employees not working or relieving in a Bulk Mail Acceptance Unit, but who are working in a Lead Sales & Services Associate, PS-6 duty assignment, and who normally performs bulk mail acceptance duties 20 or more hours per week on an ongoing basis?

*Language in the step 4 decision dated January, 9, 1997, Case # F90C-4F-C 96018356 would apply. See question and answer #9 above.*

*The current core training program is found in Management Instruction (MI) EL-720-2000-6, "Business Mail Academy Training Program."*

12) What type of Bulk Mail Training is required for those employees in a Sales & Services Associate, PS-5; or Sales, Services, & Distribution Associate, PS-5 duty assignment, when the employee performs bulk mail duties?

*By nature, the duties are on an ad hoc basis and not near the frequency of that of a Bulk Mail Clerk, PS-6. Language in the step 4 decision dated January 9, 1997, Case # F90C-4F-C 96018356 would apply. That language states, "Employees who are assigned bulk mail acceptance duties on an ad hoc basis should be trained according to their assignments and need not take the entire core." The current training program is "Business Mail Acceptance Training for Associate Offices", Course Number 23201-09, which is intended to be 8 full hours in length. The course may be either self-taught or instructor led. There is no pass/fail examination.*

13) Will the upgrade to PS-6 apply when an office currently has a Lead, Sales & Services Associate, PS-6?

*Not if the LSSA is performing the bulk mail duties. However, any other upgrade will depend on whether a duty assignment held by another employee meets the mixed duty assignment criteria found in the ELM.*

14) Could more than one employee in an office qualify for the upgrade to PS-6?

*Normally the bulk mail duties would be assigned to one employee. However, any other upgrade would depend on whether the duty assignment held by other employees meet the mixed duty assignment criteria found in the ELM.*

15) At what pay level will an employee be compensated, when performing the duties of bulk mail acceptance, but who does not meet the criteria for a mixed duty assignment or position upgrade?

*Lead Sales & Services Associate, PS-6.*

16) If an Installation has a Bulk Mail Unit, will employees in stations and branches of that Installation be upgraded?

*Not normally, as bulk mail in those offices should normally only be accepted at the Bulk Mail Unit. However, it would depend on whether the duty assignment held by other employees meet the mixed duty assignment criteria found in the ELM.*

17) Do the duty assignments of employees accepting bulk mail at Convenience Deposit Points qualify for upgrade under the ELM mixed duty assignment language?

*No. These offices are only an intake point and Bulk Mail Duties are not being performed.*

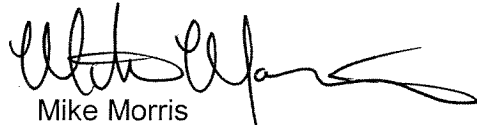
18) QUESTION: Can management assign bulk mail acceptance duties to a mail processing clerk?

***Yes. If a mail processing clerk performs bulk mail acceptance duties, the criteria in ELM 233.3 should be applied to determine whether the clerk should receive higher level pay only when performing the duties or whether a mixed-level duty assignment should be posted as Level 6 Bulk Mail Clerk. If the duty assignment is posted as Level 6 Bulk Mail Clerk the procedures described in Question and Answers Number 8 above shall apply. The mail processing clerk duties would be allied duties and the senior bidder should be given the appropriate bulk mail training.***

This Question and Answer does not set a precedent for any purpose and may not be used or cited in any forum or for any purpose other than enforcement of its terms.



Kimber A. Proud  
Labor Relations Specialist  
Contract Administration (APWU)  
U.S. Postal Service



Mike Morris  
Assistant Director, Clerk Division  
American Postal Workers  
Union, AFL-CIO

Date 3/28/06

- c. After final approval, returns the PS Form 820 to the initiating office, with copies to the area and district Human Resources managers for field or area request, as appropriate.

## 233 Evaluation of Bargaining Unit Positions

### 233.1 Purpose

Effective evaluation requires a clear understanding of the position duties, responsibilities, and work requirements. Careful description of the position ensures that employees receive equal pay for substantively equal work.

### 233.2 Basis for Position Evaluation

Comparison of a position's duties, responsibilities, and work requirements to key position descriptions serves as the only basis for evaluation. Specifically, the following factors determine final ranking:

- a. Difficulty of the work to be performed.
- b. Degree of responsibility to be exercised.
- c. Scope and variety of tasks involved.
- d. Conditions under which the work is performed.

The following factors do not affect the position evaluation:

- a. The incumbent's knowledge, skills, abilities, or previous position title.
- b. Designation of the register from which the employee will be selected.

### 233.3 Criteria for Evaluating Mixed Assignments

Criteria for evaluating mixed assignments are as follows:

- a. *Regularly Scheduled to Two Positions on a Daily Basis.* When a full-time employee is scheduled every workday to perform the work of two separately defined positions in two different grades, the employee is placed in the position of the higher grade. The duties of the lower grade position, while included in the work assignment, represent extra duties in relation to the official position and do not affect the pay grade of the employee.
- b. *Regularly Scheduled on Intermittent Days in Two Positions.* When a full-time employee is regularly scheduled on intermittent workdays to perform the work of two separate positions in different grades, the employee is placed in the position in which more than 50 percent of the time is spent. If the time is equally divided, the employee is placed in the higher grade position.
- c. *Regularly Scheduled on Intermittent Days to More Than Two Positions.* When a full-time employee is scheduled on intermittent days to perform the work of more than two positions in different grades, and less than 50 percent of the time is spent in a single position, the total work assignment of the employee is separately defined as a position and ranked in an appropriate grade.



- d. *Regularly Scheduled to Perform Work in Two or More Positions in the Same Grade.* When a full-time employee is regularly scheduled to perform the work of two or more positions in the same salary grade, the employee is assigned to the position in which more than 50 percent of the time is spent. If the work is evenly divided between two positions, or if less than 50 percent of the time is spent in a single position, the work assignment of the employee is separately defined and an appropriate title is assigned.

## 234 Appeals

Employees with positions covered by a collective bargaining agreement may grieve the salary level, title, or identification of their positions through the agreement's grievance-arbitration procedures.

## 240 Other Bargaining Unit Positions

---

To establish or change bargaining unit positions that are not covered by agreements between the Postal Service and the American Postal Workers Union; National Association of Letter Carriers; National Rural Letter Carriers Association; and National Post Office Mail Handlers, Watchmen, Messengers and Group Leaders requires submission of a narrative request or PS Form 820. Any questions regarding these position evaluations should be directed to Customer Requirements.

## 250 Position Reviews

---

To ensure proper position identification and proper evaluation of position duties and responsibilities, Customer Requirements or other appropriate officials in management may review any position at any time by correspondence or onsite interview. These officials may direct appropriate action to correct improper position evaluation or identification.



UNITED STATES POSTAL SERVICE  
475 L'ENFANT PLAZA SW  
WASHINGTON DC 20260

January 9, 1997

Mr. James P. McCarthy  
Assistant Director  
Clerk Craft Division  
American Postal Workers Union, AFL-CIO  
1300 L Street, N.W.  
Washington DC 20005-4128



Re: F90C-4F-C 96018356  
Class Action  
Sunnyvale CA 94086-9998

Dear Mr. McCarthy:

On December 19, 1996 we met to discuss the above captioned grievance at the fourth step of our contractual grievance procedure.

The issue in this case involves whether management violated the National Agreement, when they allegedly failed to provide required training for bid position number 3107.

After reviewing this matter, we mutually agreed that no national interpretive issue is presented in this case.

The parties at this level agree the Standard Mail Classification Training Program is applicable to the training of employees who relieve or function on an ad hoc basis as bulk mail clerks. The Administrator's and Instructor's Guide, Development Series TD-179A, January 1995, states in pertinent part:

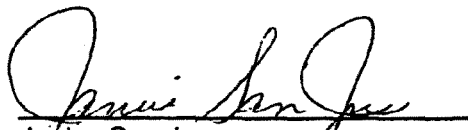
"Employees who relieve any of the above positions are also required to take this core training program in its entirety. Employees who are assigned bulk mail acceptance duties on an ad hoc basis should be trained according to their assignments and need not take the entire core."

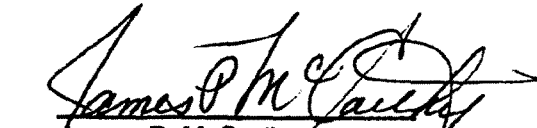
Accordingly, we agreed to remand this case to the parties at Step 3 for application of the Standard Mail Classification Training Program based on the fact circumstances.

Please sign and return the enclosed copy of this decision as your acknowledgment of agreement to remand this case.

Time limits at Step 4 were extended by mutual consent.

Sincerely,

  
Janice San Jose  
Labor Relations Specialist  
Grievance and Arbitration

  
James P. McCarthy  
Assistant Director  
Clerk Craft Division  
American Postal Workers  
Union, AFL-CIO

Date: 1/21/97



# **Business Mail Acceptance Training for Associate Offices**

**Study Guide  
Course #23201-09  
NSN #7610-07-000-7019  
September 2003**



UE200011018770000003  
23201-09 Business Mail  
Acceptance Training for  
Associate Offices

Employee Resource Management  
Employee Development



# **Business Mail Acceptance Training for Associate Offices**

## **Study Guide**



UE200011018770000003

23201-09 Business Mail  
Acceptance Training for  
Associate Offices

United States Postal Service  
Employee Resource Management  
Employee Development  
475 L'Enfant Plaza SW  
Washington, DC 20260-4215

## **Use of Training Materials**

These training course materials are intended to be used for training purposes only. They have been prepared in conformance with existing USPS policies and standards and do not represent the establishment of new regulations or policies.

Copyright 2004 by the United States Postal Service, Washington DC 20260-4215

All rights reserved.

No part of this publication may be reproduced in any form or by any means without permission, in writing, from Employee Resource Management

Certain parts of this publication may contain copyrighted materials from other sources the reproduction of which for this specific training use has been interpreted not to exceed the fair use clause of the copyright regulation (Ref. 371.5 ASM)

---

## A Commitment to Diversity

The Postal Service is committed to fostering and achieving a work and learning environment that respects and values a diverse workforce. Valuing and managing diversity in the Postal Service means that we will build an inclusive environment that respects the uniqueness of every individual and encourages the contributions, experiences and perspectives of all people.

It is essential that our work and learning environments be free from discrimination and harassment on any basis.

In our classrooms, on the workroom floor, in casual conversation and in formal meetings, employees and faculty are asked to encourage an open learning environment that is supportive to everyone.

Course materials and lectures, classroom debates and casual conversation should always reflect the commitment to safety and freedom from discrimination, sexual harassment and harassment on any prohibited basis.

EAS training staff has a professional obligation to provide a safe, discrimination free and sexual harassment free learning environment. Instructors are expected to support this commitment. Class participants are asked to support the goal of zero tolerance of behavior that violates these commitments.

If you find course material that is presented in the classroom or in self-instructional format that does not follow these guidelines, please let an instructor know immediately.

If classroom discussions do not support these principles please point that out to the instructor as well.

Diversity is a source of strength for our organization. Diversity promotes innovation, creativity, productivity and growth, and enables a broadening of existing concepts.

The Postal Service's policy is to value the diversity of our employees, customers and suppliers, to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

## CONTENTS

Introduction

Video ..... Part 1

Module 1 ..... Using Postal Publications

Module 2 ..... Mail Classification

Module 3 ..... Postage Payment

Module 4 ..... Addressing

Midpoint Exercise

Video ..... Part 2

Module 5 ..... Mail Preparation and Rate Qualification

Video ..... Part 3

Module 6 ..... Postage Statements

Module 7 ..... Math Skills

Video ..... Part 4

Module 8 ..... Scales and Weighing

Module 9 ..... Verification Procedures

Video ..... Part 5

Summary



## ***Introduction***

In order to qualify for the positions of Bulk Mail Clerk, Bulk Mail Technician, and Mailing Requirements Clerk, bidders must attend and successfully complete the Business Mail Academy. The Academy is conducted at the National Center for Employee Development in Norman, Oklahoma. Participants learn the essentials of accepting and verifying business mailings.

In addition to the positions listed above, there are thousands of Postal workers whose duties and responsibilities include the acceptance of business mailings but who are not required to attend the Academy. This training program – Business Mail Acceptance Training for Associate Offices (23201-09) – is intended for them. Specifically, it is intended for Postal workers in small offices who accept mailings consisting of fewer than 10,000 pieces. Such mailings might be presented at the window by a church or by a local grocery, for example.

This course consists of a study guide and video . It can be administered either as self-study or as instructor-led. Due to the complexity of some of the material, an instructor is recommended. Also, whenever possible the training from this course should be reinforced by on-the-job training. All or parts of On-The-Job Training for Bulk Mail Clerks (23501-09) can be used for this purpose.

The Video and the Study Guide are designed to supplement each other. They are to be used in the following sequence:

- View Part 1 of the Video
- Complete Modules 1 through 4 in the Guide
- Complete the Midpoint Exercise in the Guide
- View Part 2 of the Video
- Complete Module 5 in the Guide
- View Part 3 of the Video
- Complete Modules 6 and 7 in the Guide
- View Part 4 of the Video
- Complete Modules 8 and 9 in the Guide
- View Part 5 in the Video

The intended length of the program is eight full hours. The timing and length of any breaks are left up to the participant and/or the instructor. Instructors are welcome to add or substitute alternative learning activities as they see fit. Finally, the student will need a calculator, and it is recommended that a Domestic Mail Manual, including Quick Service Guides, be kept handy for reference.

---

BULK MAIL CLERK, PS-05

---

**FUNCTIONAL PURPOSE**

Accepts, classifies, and computes the chargeable postage on second- or third-class mail matter or both.

**DUTIES AND RESPONSIBILITIES**

1. Determines the correct classification on second- and third-class and all other mail matter mailed under a permit, computes the postage to be charged, and determines if sufficient deposit has been made by the mailer to cover the cost of mailing.
2. Completes the necessary reports and submits them to the accounting unit.
3. Maintains records of permit holders, deposits, withdrawals, and miscellaneous information incident to the processing of second- and third-class matter.
4. Accepts and makes simple distribution of second- and third-class mail.
5. Accepts precancelled and metered matter mailed in bulk quantities, and verifies if proper postage has been paid.
6. Advises customers as to proper mailing procedures.
7. In addition, may perform any of the following duties: accept other classes of mail and receipts for such matter, if necessary; separate and distribute mail; open and dump sacks and pouches; provide service at a public window.

118

**SUPERVISION**

Supervisor of unit to which assigned.

**SELECTION METHOD**

Senior Qualified

**BARGAINING UNIT**

CLERK

**KEY POSITION REFERENCE**

KP-0013

(End of Document)

---

SALES AND SERVICES ASSOCIATE, PS-05

---

## FUNCTIONAL PURPOSE

Performs a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

## DUTIES AND RESPONSIBILITIES

1. Performs any variety of sales and customer services at a retail window such as maintaining sufficient inventory of and selling stamps, stamped paper, other retail products and services and may use a computerized system, accepting and delivering packages and accountable mail; issuing and cashing foreign and domestic postal money orders; accepting and responding to customer claims and inquiries, and providing information to the public regarding postal regulations.
2. Provides sales and customer service support by greeting customers and explaining store layout; determining special interests and referring to sales and promotional programs; offers assistance in product selection; provides special assistance; and answers customer inquiries when needed.
3. Provides product and service information to customers, including informing customers regarding special offers; suggestive selling related merchandise; promoting products based on customer needs. Provides additional information regarding product features and services.
4. Handles and processes customer purchases and returns relating to products and services and may use a point of sale system. Assists customers with transactions.
5. Maintains appearance of store by setting up, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers.
6. Conducts product inventories by counting items on hand; attaches and removes security devices; accounts for items on display; and verifies and records sales floor inventory and shrinkage. Brings inventory discrepancies and shrinkage reports to the attention of the appropriate supervisory presence.
7. May verify presort and bulk mailings of all classifications, computing and maintaining on a current basis mailers' credit balances.
8. Checks and sets post office stamp-vending machines and postage meters.
9. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.
10. In addition, may assign and clear accountable items and distribute mail as required.

## SUPERVISION

Supervisor, Customer Services, or other supervisor/designee.

(Continued on Next Page)

STD POSITION DESCRIPTION

U. S. Postal Service

---

SALES AND SERVICES ASSOCIATE, PS-05

---

SELECTION METHOD

(Continued from Previous Page)

BARGAINING UNIT

CLERK

---

(End of Document)

Document Date: 09-21-99

Occupation Code: 2320-0001

BARGAINING UNIT QUALIFICATION STANDARD  
2320c  
(2320-0001) SALES AND SERVICES ASSOCIATE-LEVEL 5

DOCUMENT DATE: September 1, 2000

FUNCTION:

Performs a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

DESCRIPTION OF WORK:

See the Standard Position Description for the Occupation Code given above.

REQUIREMENTS:

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. Applicants demonstrate these levels by describing examples of experience, education, or training, any of which may be non-postal. Ratings are based on the demonstration of the level of possession of each of the KSAs. Failure to demonstrate any KSA is disqualifying.

1. Ability to sell products and services includes providing timely and courteous customer service, persuasive selling to customer needs, providing product information, creating/maintaining an aesthetically pleasing retail environment and completing sales transactions.
2. Ability to work and deal with people sufficient to work cooperatively and interact positively with customers, co-workers, as well as analyzing and responding appropriately to unique customer or coworker situations. This includes exercising courtesy and self-control to provide good appropriate customer service in order to accomplish established goals of the functional area.
3. Ability to communicate orally refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information.
4. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers, fractions and decimals.
5. Knowledge of financial procedures such as the terminology, materials, techniques, and procedures used in maintaining accurate records of disbursements, receipts and other financial information and loss prevention.
6. Ability to follow instructions refers to comprehending and executing either spoken or written instructions or directions sufficient to perform work assignments, follow procedural directions or instructions either with or without direct supervision.
7. Ability to identify and analyze problems by gathering information from both oral and written sources and develop an appropriate course of action to resolve the situation.
8. Ability to use technology-based business equipment, such as calculation equipment or computers sufficient to process customer transactions, input data, and produce numeric and written reports.
9. Ability to safely perform the duties common to the position.

EXAMINATION REQUIREMENTS:

When filled internally, this position usually involves a deferment period during which the senior bidder is provided appropriate combinations of training, testing, and practical demonstration of ability to perform in the actual position. Sequencing of examinations is as follows:

To be declared the senior bidder (or applicant in training) and begin training, the bidder (applicant) must successfully complete:

Test 470, Configuration 1

TRAINING REQUIREMENTS:

Applicants who qualify and are selected under this standard will be required to complete prescribed training satisfactorily.

PHYSICAL REQUIREMENTS:

Applicant must be physically able to perform efficiently the duties of the position.

[Back](#)

---

SALES, SERVICES AND DISTRIBUTION ASSOCIATE, PS-05

---

## FUNCTIONAL PURPOSE

Performs distribution and a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

## DUTIES AND RESPONSIBILITIES

1. Performs any variety of sales and customer services at a retail window such as maintaining sufficient inventory of and selling stamps, stamped paper, other retail products and services and may use a computerized system, accepting and delivering packages and accountable mail; issuing and cashing foreign and domestic postal money orders; accepting and responding to customer claims and inquiries, and providing information to the public regarding postal regulations.
2. Provides sales and customer service support by greeting customers and explaining store layout; determining special interests and referring to sales and promotional programs; offers assistance in product selection; provides special assistance; and answers customer inquiries when needed.
3. Provides product and service information to customers, including informing customers regarding special offers; suggestive selling related merchandise; promoting products based on customer needs. Provides additional information regarding product features and services.
4. Handles and processes customer purchases and returns relating to products and services and may use a point of sale system. Assists customers with transactions.
5. Maintains appearance of store by setting up, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers.
6. Conducts product inventories by counting items on hand; attaches and removes security devices; accounts for items on display; and verifies and records sales floor inventory and shrinkage. Brings inventory discrepancies and shrinkage reports to the attention of the appropriate supervisory presence.
7. May verify presort and bulk mailings of all classifications, computing and maintaining on a current basis mailers' credit balances.
8. Checks and sets post office stamp-vending machines and postage meters.
9. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.
10. In addition, may assign and clear accountable items.
11. Distributes primary and one or more secondary schemes of incoming mail by delivery point based on a knowledge of the distribution scheme established for the office, branch or station.

---

(Continued on Next Page)

---

Document Date: 09-21-99

SPD Number: SP-2001

Occupation Code: 2320-0003

STD POSITION DESCRIPTION

U. S. Postal Service

---

SALES, SERVICES AND DISTRIBUTION ASSOCIATE, PS-05

---

- (Continued from Previous Page)
12. Distributes primary and one or more secondary schemes of outgoing mail for dispatch based on knowledge of current distribution schemes.
  13. May perform additional duties such as: maintain records of mails; face and cancel mail; make emergency carrier relays; label and tie out mail for dispatch and other related duties for distribution.

**SUPERVISION**

Supervisor, Customer Services, or other supervisor/designee.

**SELECTION METHOD**

**BARGAINING UNIT**

CLERK

(End of Document)

---

Document Date: 09-21-99

SPD Number: SP-2001

Occupation Code: 2320-0003



BARGAINING UNIT QUALIFICATION STANDARD  
2320d  
(2320-0003) SALES, SERVICES AND DISTRIBUTION ASSOCIATE—LEVEL 5

DOCUMENT DATE: September 1, 2000

FUNCTION:

Performs distribution and a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

DESCRIPTION OF WORK:

See the Standard Position Description for the Occupation Code given above.

REQUIREMENTS:

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. The KSAs are demonstrated by successful completion of tests and specified training, unless otherwise noted. Failure to demonstrate any KSA is disqualifying.

1. Ability to sell products and services includes providing timely and courteous customer service, persuasive selling to customer needs, providing product information, creating/maintaining an aesthetically pleasing retail environment and completing sales transactions.
2. Ability to work and deal with people sufficient to work cooperatively and interact positively with customers, co-workers, as well as analyzing and responding appropriately to unique customer or coworker situations. This includes exercising courtesy and self-control to provide good appropriate customer service in order to accomplish established goals of the functional area.
3. Ability to communicate orally refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information.
4. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers, fractions and decimals.
5. Knowledge of financial procedures such as the terminology, materials, techniques, and procedures used in maintaining accurate records of disbursements, receipts and other financial information and loss prevention.
6. Ability to follow instructions refers to comprehending and executing either spoken or written instructions or directions sufficient to perform work assignments, follow procedural directions or instructions either with or without direct supervision.
7. Ability to identify and analyze problems by gathering information from both oral and written sources and develop an appropriate course of action to resolve the situation.
8. Ability to use technology-based business equipment, such as calculation equipment or computers sufficient to process customer transactions, input data, and produce numeric and written reports.
9. Ability to safely perform the duties common to the position.

EXAMINATION REQUIREMENTS:

When filled internally, this position usually involves a deferment period during which the senior bidder is provided appropriate combinations of training, testing, and practical demonstration of ability to perform in the actual position. Sequencing of examinations is as follows: To be declared the senior bidder (or applicant in training) and begin training, the bidder (applicant) must successfully complete:

Test 470, Configuration 1

TRAINING REQUIREMENTS:

Applicants who qualify and are selected under this standard will be required to complete prescribed training satisfactorily.

PHYSICAL REQUIREMENTS:

Applicant must be physically able to perform efficiently the duties of the position.

[Back](#)

---

LEAD SALES & SERVICES ASSOCIATE, PS-06

---

## FUNCTIONAL PURPOSE

Performs a variety of sales and customer support services for products including stamps, stamped paper, postal cards, philatelic products, and special promotional items; with or without direct supervision. May work alone or provide technical direction to one or more clerks assigned to sales activities, and reviews their work for accuracy.

## DUTIES AND RESPONSIBILITIES

1. Maintains a comprehensive working knowledge of regulations ruling, policy, and procedures relating to all phases of retail services. Provides technical guidance to retail employees assigned to the unit, informing them of changes or clarifications in policies, procedures, operations or regulations.
2. Forecasts and maintains a separate stamped inventory to fill requisitions submitted by unit clerks.
3. Prepares daily consolidated funds under local bank deposit procedure; prepares and maintains unit accounting records of retail activities.
4. Conducts or witnesses transfers of fixed credits between employees as required, assisting in the physical count of stock. Reviews fixed credits periodically and recommends adjustments if necessary. Examines and insures the integrity of security containers assigned to employees for the storing of their fixed credit and reports lack of conformity with security regulations.
5. Maintains an adequate supply of materials required for the operation of a retail unit.
6. Accepts and verifies applications for redeemed stamps and stamped paper. Prepares and submits necessary stock for destruction.
7. In accordance with the directives of the supervisory presence, plans, directs, organizes and monitors retail related programs/projects and the work of people to meet unit goals, including coordinating and scheduling work hours. Supplies leadership necessary to secure a customer friendly environment, encourages professional appearance and work habits to accomplish effective and pleasant customer relationships.

---

(Continued on Next Page)

---

Document Date: 09-20-99

Occupation Code: 2320-0004

---

LEAD SALES & SERVICES ASSOCIATE, PS-06

---

(Continued from Previous Page)

8. Instructs and advises individual employees in correct financial and retail sales procedures.
9. Performs any variety of sales and customer services at a retail window such as maintaining sufficient inventory of and selling stamps, stamped paper, other retail products and services and may use a computerized system, accepting and delivering packages and accountable mail; issuing and cashing foreign and domestic postal money orders; accepting and responding to customer claims and inquiries, and providing information to the public regarding postal regulations.
10. Provides sales and customer service support by greeting customers and explaining store layout; determining special interests and referring to sales and promotional programs; offers assistance in product selection; provides special assistance; and answers customer inquiries when needed.
11. Provides product and service information to customers, including informing customers regarding special offers; suggestive selling related merchandise; promoting products based on customer needs. Provides additional information regarding product features and services.
12. Handles and processes customer purchases and returns relating to products and services and may use a point of sale system. Assists customers with transactions.
13. Maintains appearance of store by setting up, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers.
14. Conducts product inventories by counting items on hand; attaches and removes security devices; accounts for items on display; and verifies and records sales floor inventory and shrinkage. Brings inventory discrepancies and shrinkage reports to the attention of the appropriate supervisory presence.
15. May verify presort and bulk mailings of all classifications; computing and maintaining on a current basis mailers' credit balances.
16. Checks and sets post office stamp-vending machines and postage meters.
17. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.

(Continued on Next Page)

STD POSITION DESCRIPTION

U. S. Postal Service

---

LEAD SALES & SERVICES ASSOCIATE, PS-06

---

18. In addition, may <sup>(Continued from Previous Page)</sup> assign and clear accountable items and distribute mail as required.

SUPERVISION

Supervisor, Customer Services, or other designated supervisor.

SELECTION METHOD

BARGAINING UNIT

CLERK

(End of Document)

---

Document Date: 09-20-99

Occupation Code: 2320-0004

BARGAINING UNIT QUALIFICATION STANDARD  
2320e  
(2320-0004) LEAD SALES AND SERVICES ASSOCIATE—LEVEL 8

DOCUMENT DATE: June 30, 2001

FUNCTION:

Performs a variety of sales and customer support services for products including stamps, stamped paper, postal cards, philatelic products, and special promotional items; with or without direct supervision. May work alone or provide technical direction to one or more clerks assigned to sales activities, and reviews their work for accuracy.

DESCRIPTION OF WORK:

See the Standard Position Description for the Occupation Code given above.

REQUIREMENTS:

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. The KSAs are demonstrated by successful completion of tests and specified training, unless otherwise noted. Failure to demonstrate any KSA is disqualifying.

1. Ability to sell products and services includes providing timely and courteous customer service, persuasive selling to customer needs, providing product information, creating/maintaining an aesthetically pleasing retail environment and completing sales transactions.
2. Ability to work and deal with people sufficient to work cooperatively and interact positively with customers, co-workers, as well as analyzing and responding appropriately to unique customer or coworker situations. This includes exercising courtesy and self-control to provide good appropriate customer service in order to accomplish established goals of the functional area.
3. Ability to communicate orally refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information.
4. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers, fractions and decimals.
5. Knowledge of financial procedures such as the terminology, materials, techniques, and procedures used in maintaining accurate records of disbursements, receipts and other financial information and loss prevention.
6. Ability to follow instructions refers to comprehending and executing either spoken or written instructions or directions sufficient to perform work assignments, follow procedural directions or instructions either with or without direct supervision.
7. Ability to identify and analyze problems by gathering information from both oral and written sources and develop an appropriate course of action to resolve the situation.
8. Ability to coordinate, sufficient to open, run and close a retail postal outlet. Includes planning and organizing the work of a small group of employees to achieve unit goals.
9. Ability to use technology-based business equipment, such as calculation equipment or computers sufficient to process customer transactions, input data, and produce numeric and written reports.

10. Ability to safely perform the duties common to the position.

**EXPERIENCE REQUIREMENTS:**

Applicants must have a minimum of one year of experience in a window position (window clerk, distribution and window clerk, distribution, window and markup clerk, sales and services associate, sales, services and associate) providing a comprehensive knowledge of postal regulations, rulings, policy, and procedures relating to window work. This experience must have demonstrated the applicant's ability to give clear and concise instructions to other employees and to work independently.

**EXAMINATION REQUIREMENTS:**

When filled internally, this position usually involves a deferment period during which the senior bidder is provided appropriate combinations of training, testing, and practical demonstration of ability to perform in the actual position. Sequencing of examinations is as follows:

To be declared the senior bidder (or applicant in training) and begin training, the bidder (applicant) must successfully complete: Test 470, Configuration 1.

**TRAINING REQUIREMENTS:**

Applicants who qualify and are selected under this standard will be required to complete prescribed training satisfactorily.

**PHYSICAL REQUIREMENTS:**

Applicant must be physically able to perform efficiently the duties of the position.

[Back](#)

**BARGAINING UNIT QUALIFICATION STANDARD**  
**2300**  
**(2320-15XX) BULK MAIL CLERK--LEVEL 5**  
**(2345-15XX) CLAIMS AND INQUIRY CLERK--LEVEL 5**  
**(2345-32XX) MAILING REQUIREMENTS CLERK--LEVEL 5**

**DOCUMENT DATE:** December 31, 1990

**FUNCTION:**

**Bulk Mail Clerk:** Accepts, classifies, and computes the chargeable postage on second- or third-class mail matter or both.

**Claims and Inquiry Clerk:** Performs clerical work involved in the claims and inquiry functions of the post office, where the claims work does not reach the level of difficulty and responsibility represented by Key Position 17 and the inquiry work relates to domestic mail.

**Mailing Requirements Clerk:** Performs basic nonsupervisory work in regard to matters of mail classification, mailability, rates, methods of mailing, fees and special services, and other related phases of postal laws and regulations; participates in local revenue protection program.

**DESCRIPTION OF WORK:**

See the Standard Position Descriptions for the Occupation Codes given above.

**REQUIREMENTS:**

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. Applicants demonstrate these levels by describing examples of experience, education, or training, any of which may be non-postal. Ratings are based on the demonstration of the level of possession of each of the KSAs. Failure to demonstrate any KSA is disqualifying.

**1. General**

- B-4 . Ability to work without immediate supervision.
- B-9. Safety in performance of duties common to the position.
- B-10. Ability to maintain records and prepare reports.
- B-11. Ability to perform effectively under the pressures of the position.
- B-22. Ability to perform basic arithmetic computations.



- B-39. Ability to operate office machines such as calculator, adding machine, duplicating machine, or any other office equipment as appropriate to the position.
- B-44. Ability to personally resolve problems of a routine nature.
- B-46. Ability to analyze, explain, and apply laws, regulations, rulings, and procedures to the work to be performed.
- B-53. Ability to work with others.
- B-58. Ability to deal with the public in a polite, courteous, and professional manner.

## **2. Special**

Knowledge of postal regulations and services affecting individuals, groups, and business organizations (which may include such matters as postage rates, mail classification, mailing permits, special postal services, indemnity claims, proper preparation of letters and packages and admissibility of matter to the mails).

### **EXAMINATION REQUIREMENTS:**

1. Applicants must meet, or have met, the examination requirements of Postal Service Test 470, Configuration 1.
2. Applicants for Mailing Requirements Clerk must demonstrate the ability to key data on a computer terminal at a rate of 25 correct lines within five minutes. This must be demonstrated by successful completion of Postal Service Test 714 at the low standard. Certificates of proficiency are not acceptable.
3. Applicants for Bulk Mail Clerk and Mailing Requirements Clerk positions must successfully complete the appropriate training program and examination.
4. In accordance with section 142 of this handbook, local management may require applicants for Claims and Inquiry Clerk positions to demonstrate the ability to key data on a computer terminal at a rate of 25 correct lines within five minutes. This must be demonstrated by successful completion of Postal Service Test 714 at the low standard. Certificates of proficiency are not acceptable.

### **PHYSICAL REQUIREMENTS:**

Applicant must be physically able to perform efficiently the duties of the position.

### **ADDITIONAL PROVISIONS:**

1. For some positions, the work requires a particular background of experience or training, knowledge of particular types of mail operations, or possession of a particular skill. Selective


**Qualification Standard 2300**  
**Bulk Mail Clerk--Level 5 (2320-15XX)**  
**Claims and Inquiry Clerk--Level 5 (2345-15XX)**  
**Mailing Requirements Clerk--Level 5 (2345-32XX)**  
**Document Date: December 31, 1990**

placement may be used to fill those positions which require such experience, training, or skill; for example, knowledge of a language other than English.

2. When a particular duty assignment requires the operation of any motor vehicle, applicants must have a valid state driver's license, and demonstrate and maintain a safe driving record. Applicants must pass the Postal Service road test to show the ability to safely drive a vehicle of the type used on the job.
3. Applicants for Bulk Mail Clerk--Level 5 must be physically able to perform effectively the duties of the position including the ability to lift mail sacks weighing up to 70 pounds.

# Management Instruction

Date	September 18, 2000
Effective	Immediately
Number	EL-720-2000-6
Obsoletes	EL-730-85-3
Unit	Employee Development

  
Yvonne Maguire  
Vice President  
Employee Resource Management

## BUSINESS MAIL ACADEMY TRAINING PROGRAM

### PURPOSE

This instruction informs officers, executives, and managers at Headquarters, areas, and districts about the policy for use of the Business Mail Academy Training Program, which replaced the Standard Mail Classification Training Program and its accompanying qualifying exam called Postal Service Test 480 that were discontinued February 11, 2000.

This new training program changes the process in which senior bidders, or senior bidders for relief assignments, attend training and ultimately qualify for the following positions:

1. Bulk mail clerk.
2. Bulk mail technician.
3. Mailing requirements clerk.

**Note:** For the purposes of this training program, a *relief assignment* is an assignment in which handling business mail in a relief capacity is indicated in the bid posting.

### Policy

#### General

The Business Mail Academy Training Program supersedes all existing programs for training employees entering these positions and is the only training program that may be used. The program is in accordance with the *Employee and Labor Relations Manual* (ELM) 15, 720, and applicable provisions of Article 37 of the USPS / APWU National Agreement.

### CONTENTS

<b>PURPOSE</b> .....	1
Policy .....	1
General .....	1
Deferment Period .....	2
Description .....	2
Application .....	3
Exceptions .....	3

## Deferment Period

Article 37 allows senior bidders for these positions to be deferred from permanent assignment until they have successfully completed components 1 through 6 listed below. The deferment period begins with the identification of the senior bidder and ends when the results of Postal Service Test 427 (component 6) are received.

## Description

The Business Mail Academy Training Program consists of seven components listed in the left-hand column below. These components are addressed in the *Business Mail Academy Training Program Administrator's Guide* (course number 57601-02) and are to be provided in the order given. Qualified bidders will attend on-the-job training (component 7).

	What component is offered?	Is component required for bulk mail clerk?	Is component required for bulk mail technician?	Is component required for mailing requirements clerk?	Where is the component administered?
1.	<i>Working in Business Mail Entry: A Job Preview for Clerks (video)</i>	Required	Required	Required	Locally
2.	Postal Service Test 714, <i>Data Entry</i>	Local option	Local option	Required	Locally
3.	<i>Introduction to Business Mail Entry</i>	Required	Required	Required	Locally
4.	Postal Service Test 425, <i>Business Mail Entry Unit</i>	Required	Required	Required	Locally
5.	<i>Business Mail Academy</i>	Required	Required	Required	National Center for Employee Development (Norman, OK)
6.	Postal Service Test 427, <i>Business Mail Academy</i>	Required	Required	Required	National Center for Employee Development (Norman, OK)
7.	<i>On the Job Training for Business Mail Academy Graduates</i>	Required, but not for qualification	Required, but not for qualification	Required, but not for qualification	Locally

## Application

Any employee identified as senior bidder, or a senior bidder for relief assignment, that is assigned to the following positions must successfully complete the first 6 components listed above to qualify for the job.

Employee	Level	Occupational Code
Bulk mail clerk	PS-5	2320-15xx
Bulk mail technician	PS-6	2320-28xx
Mailing requirements clerk	PS-5	2345-32xx
Mailing requirements clerk	PS-6	2345-32xx

## Exceptions

An employee identified as the senior bidder is deemed *already qualified* if any one of the following statements is true:

- a. The employee's "live record" indicates that he/she is qualified in accordance with Article 37.1.L of the National Agreement.
- b. The employee has successfully completed the (now-obsoleted) Standard Mail Classification Training Program and passed Postal Service Test 480 (now obsoleted) within the last 5 years.
- c. The employee has successfully completed the Business Mail Academy Training Program and passed Postal Service Test 427 within the last 5 years.
- d. The employee has held a relief bid assignment for a bulk mail clerk position, mailing requirements clerk position, or bulk mail technician position within the last 5 years.

If any of the above exceptions are true, the senior bidder need not requalify. He or she may be required to attend brush-up training in accordance with Article 37.1.M and with the Brush-Up Training Memorandum of Understanding of the National Agreement, paragraph II.G.