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POST OFFICE DEPARTMENT
REGIONAL INSTRUCTIONS

PART 300
OPERATIONS
234-0-62

SUBJECT Staffing Post Offices	DATE 1-25-68	FILING NO. 362-4
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I. Responsibility for Authorizing Positions

The director, postal operations division, shall establish complements in post offices, including supervisory complements.

II. Guidelines to be Used in Staffing

A. Supervisory Complement

1. Definition

Supervisory complements consist of all authorized supervisory positions except postmasters, including assistant postmasters, assistant to the postmaster, assistant to the station superintendent, and all supervisory, clerical, specialized, and technical positions in level PFS-7, and above.

2. Receipt of Request for Changes

Request the postmaster to complete Form 820, Request for Ranking of Position, in duplicate, and to submit an organization chart. Large offices need to submit only a chart of the division affected. Form 1994, Employees' Work Schedule, may be used for supervisory schedules. Investigate requests for increases in supervisory complements whenever necessary to determine the need for the position.

3. Determination Guides

- a. Review organization chart for proper grouping of activities within each division.
- b. Consult Handbook P-1 for requirements.
- c. Compare request with staffs of similar offices. However, the fact that an office is comparable in employees and receipts with standards set out in Handbook P-1, or with other offices does not in itself indicate need for like or additional positions.
- d. Consider duties, responsibilities, and post office level in relation to grade and title requested.

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- e. Examine proposed duties. Make certain they are supervisory, not clerical. At the time of personal investigation, make certain the employee performs the duties stated on Form 820.
- f. Consider number of employees to be supervised in relation to duties. Overall ratio of regular employees to supervisors increases with the size of office.
- g. Study arrangement of schedules. They should not overlap. Responsibility should not be divided. In mail handling operations, maximum supervision should be provided during peak periods and minimum supervision during light periods.
- h. Consider rearrangement of schedules to provide adequate supervision with present complement.
- i. Consider effect on manpower.
- j. The position of assistant to the postmaster in salary level PFS-6 or salary level PFS-7, may be authorized under the following conditions:
 - (1) Salary level PFS-6 at offices having 4 or more employees, exclusive of rural carriers, and the postmaster's position is PFS-9 or above.
 - (2) Salary level PFS-7 at offices having 470 or more revenue units, city delivery service, and 5 to 8 regular employees, including rural carriers. At least 2 of the regular employees must be regular clerks.Authorization does not automatically increase the clerical complement.
- k. The position of assistant postmaster may be authorized only at offices having in excess of 710 revenue units annually, city delivery service, and 6 or more regular employees, including rural carriers. At least 2 of the regular employees must be regular clerks. Authorization does not automatically increase the clerical complement.
- l. Where an assistant postmaster position has been established and the supervisory duties have increased to the extent that the postmaster and assistant postmaster are overburdened, the next supervisory position to be authorized should be either a foreman, mails, or superintendent of mails, depending on the needs of the office under consideration. When the position of superintendent of mails is authorized, he will assume direct charge of mail handling and delivery functions.

- m. Where a superintendent of mails position has been established and the supervisory obligations have increased to the extent that additional supervision is needed, the next position to be authorized is that of foreman, mails. As a general rule the superintendent of mails should report with the carriers in the morning, with the foreman directing the mailhandling activities in the afternoon and performing such other duties as may be directed by the superintendent of mails. The position of overall assistant superintendent of mails should be authorized only when the facts clearly demonstrate the need for a supervisory position having the same organizational jurisdiction as the superintendent of mails.
- n. Assistant to the station superintendent, salary level PFS-6, may be authorized at offices where the station or branch superintendent is in level PFS-8 and some assistance is required each day in managing the station, where there are five or more regular employees assigned to the station, exclusive of the superintendent, at least two of whom are clerks. The assistant to the superintendent will provide all necessary general assistance to the superintendent, including replacement of the superintendent during all absences, and will perform clerical work regularly when not engaged in supervisory duties. No increase in the total complement of the station will be authorized to provide for the position of assistant to the superintendent. Whenever the superintendent's position is reranked to PFS-9 or above at stations or branches having the position of assistant to the station superintendent, review the workload to determine whether the superintendent requires full-time assistance in managing the station or branch. If he does, consider the need for the position of assistant superintendent in lieu of the position of assistant to the station superintendent.
- o. Customer relations representative position PFS-6 (standard position 2-427), and initial customer relations representative positions, PFS-7 (standard position 2-426) and PFS-8 (standard position 2-425) may be authorized under the following conditions:
 - (1) PFS-6 may be authorized only as a trainee position for a period of six months at post offices having a vacant, duly authorized position of customer relations representative at PFS-7 or PFS-8. At the end of the six month period, the trainee will either be promoted to the vacant PFS-7 or PFS-8 position or will be returned to his former position.

- (2) PFS-7 may be authorized when (a) a minimum population of 100,000 persons is served through the post office, including those who are served by city delivery, rural and star routes and (b) a minimum of 25 mailers is served, each of whom has mailings that produce a minimum of 150 revenue units annually for the post office.
- (3) PFS-8 may be authorized when (a) a minimum population of 250,000 persons is served through the post office including those who are served by city delivery, rural or star routes and (b) a minimum of 50 mailers is served, each of whom has mailings that produce a minimum of 150 revenue units annually for the post office.
- (4) Positions of customer relations representatives may be necessary in some post offices that do not meet the criteria for authorization of the standard positions of this title. Recommendations for authorization in these offices need to be supported by justifications particular to the cases. If and when authorized, the assignments shall be identified and ranked as individual positions.
- (5) In a post office having an administrative services organization (office or section), the customer relations representative reports to the supervisor in this organization who has immediate responsibility for the customer relations program. In a post office not having an administrative services organization, the customer relations representative reports to the supervisor in the mails organization who has immediate responsibility for the customer relations program. The customer relations representative reports directly to the postmaster when called upon to perform customer relations, public information, and/or public relations assignments for which the postmaster has chosen to retain immediate responsibility.

4. Annual Review of Supervisory Positions

- a. During the last fiscal quarter of each year, regional office initiates a management review of all supervisory positions to ascertain whether changes should be made in salary levels to reflect changes in conditions which may have occurred since last review.

- b. Obtain from postmaster revised Form 820, Request for Ranking of Position, for each supervisor whose duties or status has changed.
 - c. Retire superseded Forms 820.
 - b. Amend Form 1832, Employee Complement and Organization Data, Form 1832-A, Authorized Supervisory Complement, and organization chart as necessary.
5. Positions Requiring Authorization or Ranking at Regional or Departmental Level
- a. Review PM 751.43, 757.22, and 757.6 for use of Form 820.
 - b. Submit to the Installations Management Division, Bureau of Operations, for approval:
 - (1) All requests for new supervisory positions that are in addition to those previously authorized, including assistant to the postmaster, PFS-6, and assistant to the station superintendent, PFS-6.
 - (2) All requests for new supervisory positions which are in lieu of other positions reverted.
 - (3) All requests for changes in titles of position, with or without changes in principal duties or salary levels.
 - (4) All requests for reranking of positions from PFS-6, or below, to PFS-7 or above.
 - (5) All requests for reranking of positions which in effect create new positions by adding additional duties of higher level work.
 - c. It is not necessary to submit to Installations Management Division for approval requests for reranking of positions in PFS-7, or above, with no change in title or principal duties.
 - d. Forms 820 must be approved and endorsed by the director, postal operations division, before being referred to the regional compensation branch or the compensation division, bureau of personnel, for ranking. When approval of position authorization by Installations Management Division is necessary, the Form 820 shall not be forwarded to the compensation branch for ranking until after such approval has been obtained. Under section 3A of Form 820, add the endorsement: This description properly describes a position considered necessary in this installation.

B. Clerical Complement

1. Definition

All authorized clerical and supervisory positions, except postmaster. Separate complement records are kept of the clerk positions authorized and the supervisory positions authorized, but the stated total clerical complement is always the combined total.

2. Postmaster's Request for Clerk Position

- a. The chief, organization and standards branch, shall obtain from all first- and second-class post offices an explanation of need for position, a statement that 8-in-10 hour schedule can be arranged, and a statement that an equivalent amount of substitute assistance will be surrendered, except when position is requested because of an increase in the supervisory complement or the inauguration of new service, such as establishment of station or branch or consolidation of offices.
- b. The chief, organization and standards branch, shall obtain from small first- and all second-class post offices, in addition to information outlined in 2a, above, Form 1994 showing present schedules of regular clerks and substitute assistance used, proposed schedules of regular clerks and proposed substitute assistance if position is authorized, and times of receipts and dispatches of mail and percentage of mail at each receipt and dispatch. Post office hours, window service hours, and source of revenue, i.e., from individual or large mailers, from seasonal or year-round mailers, should also be obtained.
- c. If doubt exists, or downward trend in business is indicated, investigate postmaster's request. Increased or inefficient use of substitutes may be attributable to improper scheduling of both regular and substitutes, inefficient arrangement of equipment, and weak supervision in units where increase proposed.

3. Analysis of Postmaster's Request

- a. At large offices, use personal knowledge of office. Analyze manpower reports and, where available, work measurement reports, to determine trend and efficiency of manpower usage, whether sufficient auxiliary hours will remain to maintain the flexibility of scheduling to permit usage of manhours to maximum advantage and whether positions are justified during light periods of the year.

- b. At small first-class and second-class offices, review manpower reports. Compare with office of similar size. Determine permanent need for position; receipts should show a consistent increase from a source likely to continue. Review duties of proposed position; work should be of a character performed under normal conditions. Do not authorize regular positions for seasonal work or work brought on by unusual conditions. Review Form 1994. Note schedules during light and heavy periods of the day. Determine that substitute assistance is being used daily on an 8-in-10 hour basis for the regular position requested and that the schedule is a service necessity the year round. Ascertain that sufficient auxiliary hours remain to maintain flexibility.
- c. At third-class offices, determine that schedule covers at least 40 hours a week. Compare with office of similar size for manpower usage. Consider same factors as those outlined for small first-class and second-class offices. Review Form 1994. Note clerical schedules in relation to receipt and dispatch of mail. Determine that postmaster is fully employed and that clerk assistance is provided only when actually needed. Only where unusual conditions exist will an annual rate regular position be necessary in third-class offices.
- d. Authorize regular annual rate positions only in lieu of 40 hours substitute time weekly on an 8-within-10 hour basis daily, except as provided in B, 2a.
- e. Provide necessary manpower by regular annual rate employees wherever practicable to establish 8-in-10 hour tours.
- f. Authorize a regular position only when an eligible person is available to fill it.
- g. Authorize regular positions to cover scheduled off-days only when advantageous at the large offices.
- h. Authorize regular positions to cover leave replacements where the positions can be utilized annually on a continuing basis.

- i. Make necessary reductions in clerical complements when vacancies occur. Exception is made when action will result in a substantial saving in manpower. In such cases, give suitable advance notice of personnel action.

C. Self-Service Postal Unit Technician, PFS-6

1. Authorization

Normally, the director, organization and standards branch, will authorize at least one position of Self-Service Postal Unit Technician, PFS-6 in each post office where a Self-Service Unit is established, with the following exceptions:

- a. A position shall not be authorized in post offices where the only Self-Service Unit is located in the post office lobby, without prior approval of the Installations Management Division, Bureau of Operations.
- b. In offices having more than one Self-Service Unit, additions to the initial position may not be approved without prior approval of the Installations Management Division, Bureau of Operations.

2. Selection of Employee for Position of Self-Service Unit Technician

- a. Employee selected must have qualified on the special examination given for the position.
- b. He must meet all the requirements in Handbook X-118B, Qualification Standard.

3. Assignment of Self-Service Unit Technician

- a. The Technician may be assigned to the main office, or to the station or branch nearest the location of the Self-Service Unit.
- b. In no case shall the position of Self-Service Unit Technician be authorized as an additional position in a station or branch, unless the services of the Technician can be economically utilized on five full 8-hour days at the station or branch.

- c. Neither should the assignment of the Technician result in an arbitrary reassignment of a clerk assigned to a station or branch, merely to make room for the Technician.
- d. At offices having more than one Self-Service Unit, it will generally be more desirable to assign the Technician to the main office.
- e. Excessive travel time, timely response to patron troubles, delays affecting good patron relations, and other factors contributing to increased costs should be primary considerations in making the assignment.
- f. The servicing of a Self-Service Postal Unit is a part-time job and the employee receiving the assignment as Self-Service Unit Technician, PFS-6, must be assigned other duties which will insure his full-time employment.

D. Vehicle Service Complements

1. Establishment

The establishment of a position should be based on service needs and must be fully justified.

2. Staffing Criteria

The criteria as outlined in Handbook CR-4, Vehicle Service Staffing Criteria, shall be used in determining appropriate Vehicle Operations and Vehicle Maintenance complements.

E. Mail Handler Complement

1. Definition

All authorized mail handler positions.

2. Postmaster's Request for Regular Mail Handler Position

Obtain explanation of need for position and statement that authorization will not increase overall manhours.

3. Analysis

Determine that:

a. There are sufficient duties of the type described in items (A) to (E) of key position 8, to warrant arrangement of 8-in-10 hour tour. [Mail handler position usually can be justified only at large offices]

✓ b. No clerical duties will be assigned.

4. Assignment

See key position 8, for duties of mail handlers and standard position 1-33 as to position of group leader, mail handlers. Mail handlers may not be assigned to:

a. Work involving rating, checking, or recording of mail.

b. Distribution of mail matter, other than parcel post as follows:

(1) Incoming Parcel Post

(a) May sort out a quantity of "outside" parcels addressed to a firm.

(b) May move bulk quantities of parcels for a firm (from the workroom floor to a back platform) for delivery to the addressee, provided any necessary recording or taking of receipts is performed by clerks.

(c) May not make separations according to delivery routes or delivery stations when such sorting is governed by street addresses, even though charts or diagrams are available for consultation.

(2) Outgoing Parcel Post

(a) May make separations which require no scheme knowledge and which involve only reading the name of the office or state to which addressed.

Handwritten notes:
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✓

- (b) May separate outgoing parcel post into (direct separations for cities) (separations for states,) (and) into (alphabetical groupings of states when the container is plainly labeled to show the alphabetical groups.)
- (c) May not make a separation in which certain cities or states are held out, as such "hold-outs", necessitate either a knowledge of the "hold-out" or the consulting of a chart or scheme.

5. Group Leader, Mail Handlers, Positions

- a. The group leader, mail handlers, position is authorized at post offices to assure proper handling of mail and maximum utilization of mail handlers where intermediate supervision is needed because:
 - (1) The responsible foreman, mails cannot provide direction due to the detached location of the mail handlers group or for other compelling reasons.
 - (2) A knowledge of the work details and dispatch schedules is needed at the work location.
- b. These positions should be filled by promotion of experienced and qualified mail handlers. The full requirements of standard position 1-33(R) (Handbook P-1) must be assigned and met to warrant ranking in salary level PFS-5.
- c. Positions of this type authorized prior to issuance of standard position 1-33 and ranked on an individual basis above PFS-4 are not affected by requirements of b relating to authorization and promotion as long as incumbents remain in these positions.
- d. Establishment of the position of group leader, mail handlers, does not relieve the foreman or other supervisor of any basic responsibilities for the mail handlers' functions.

6. Watchman (Mail Handling Areas) Positions

- a. This position is authorized for the limited number of larger post offices having need for the function, the particulars of which are outlined in standard position 2-216 (Handbook P-1).
- b. The position is in the mail handler group. Preference shall be given to physically handicapped employees in that group.
- c. Although the duties are usually outside those of guards in the maintenance service, the maintenance service may be drawn upon for technical assistance in establishing the performance standards and the training program which should be instituted for all incumbents.
- d. Incumbents are eligible for the uniform allowance under PM 722.
- e. The duties are most closely related to the handling and protection of mail, and ordinarily the incumbents will be under the immediate supervision of the mailing floor supervisor of the assignment area.

f. City Carrier Complements

1. Regular Carrier Positions

- a. The chief, distribution, delivery, and vehicle services branch, shall recommend regular carrier positions to the chief, organization and standards branch, when auxiliary routes require 8 hours daily on a continuing basis.
- b. Use Form 1644 to authorize the regular positions.
- c. Enter change on Form 1817, City Delivery Complement, as follows:
 - (1) Complement changes in spaces provided, and include a brief statement of circumstances as a basis for a reduction, or indicate the number of the auxiliary route converted to regular.
 - (2) A very brief statement of important actions occurring and provide a date of the correspondence.

d. Adjust Form 1832, Employee Complement and Organization Data.

2. Utility Carrier and Carrier Technician

a. The chief, distribution, delivery, and vehicle services branch, shall recommend these positions to the chief, organization and standards branch, on the basis of one for each five regular positions, taking into consideration that two- or three-trip routes provide only one delivery on Saturday.

b. Use Form 1644 to authorize the positions.

c. Enter change on Form 1817 as outlined in F,1,c, above.

d. Adjust Form 1832.

3. Regular Carrier for Leave Replacement

a. The chief, distribution, delivery, and vehicle services branch, shall recommend authorization of regular carrier positions for replacement of annual and sick leave to the chief, organization and standards branch, when these absences cannot be covered by substitutes, and the positions can be used annually on a continuing basis.

b. Positions will be authorized on Form 1644.

c. Enter change on Form 1817 as outlined in F,1,c.

d. Adjust Form 1832.

4. Substitute Carriers

The distribution, delivery, and vehicle services branch shall observe the following:

- a. Career substitute quota may be no greater than one for each five regular positions or fractions thereof. When there are no career regulars, one career substitute may be authorized.
- b. Where both the maximum number of Annual Rate Regular Employees and Career Substitute Employees are authorized and some augmentation is still necessary to effect delivery service functions, the minimum number of Hourly Rate Regular positions should be established to support the regular and substitute force. The establishment of these positions should be strictly in accordance with Regional Instructions 362-2.
- c. Employment of temporary substitutes shall be authorized only when it is not possible to augment the career substitute force through use of Hourly Rate Regular positions.

G. Maintenance Force---Mail Processing Mechanical Positions
(See also Part 632)

The chief, plant maintenance branch, and the chief, organization and standards branch, shall consider the following when allocating standard positions 6-62, 6-63, 6-64 and 6-65:

1. The position of oiler is to be used where full time cleaning and lubrication routes of machinery can be arranged. Mechanic-helper SP 6-1 may be applied when it permits more advantageous arrangement of employee schedules.
2. Tour foremen of mechanics will provide on-the-job supervision and will participate as necessary in actual performance of the work. They will have knowledge of trouble-shooting procedures and complex maintenance equal or superior to that of the SP 6-64 mechanic.
3. In general, repair work on mail-processing machinery and systems shall be performed by PFS level 6 mechanics (SP 6-63). Level PFS-7 mechanics (SP 6-64) shall perform the more difficult trouble-shooting and testing in complex equipment and circuits as described. They will be allocated only to those tours where there is a positive need for these services to avoid and minimize interruptions to mail processing services and the skill and knowledge of maintenance supervisors is not readily available.

H. Personnel Management Complements

1. Organization and Complement

The instructions in 844.4, Postal Manual, on organization and complement for personnel management are to be used as guides whenever a regional office is examining the suitability of the existing personnel management organization in a post office having total authorized employee complements of 150 or more. Occasions for examining the organization include proposals by post offices for changes, appraisals initiated by the regional office, and studies requested by the Department.

2. Implementation of Guides

Satisfactory personnel management in a post office depends largely on the degree of knowledge local management (particularly the postmaster) has on what a good personnel program can do. Before implementing these guides in a post office, (on a long or short range basis), determine to what extent local management understands the program and where needed, provide further information. Encourage their interest, cooperation, and ideas in implementing the guides. How to do this will vary from office to office in recognition of differences in existing conditions and in degrees of local knowledge and understanding of personnel management.

3. Improved Organization

All regional or post office personnel involved in implementing the guides should recognize that this affords a prime opportunity to improve the organization and complement of their particular post office resulting in a personnel management organization that:

- a. Facilitates satisfactory accomplishment of all functions.
- b. Contains the number of positions needed.
- c. Contains the kinds of positions according to their duties that will contribute most effectively to accomplish these functions.

4. Conduct of Review

- a. When an occasion arises requiring examination of the organization for personnel management in a post office, the director, industrial relations division, should initiate the development of a plan for conducting a review of the total personnel function in that office. The director, postal operations division, must participate with the director, industrial relations division, in construction of the plan. The Regional Director should normally approve the plan. The director, industrial relations division, should enlist the active participation of every branch of the industrial relations division, requiring that they give current evaluations of the status of the personnel management functions in the post office to be studied. All reports on the office should be obtained. The plan should designate who will conduct the review and the group leader. The director, postal operations division, shall designate a member of his staff to be a member of the group to participate in the review. If considered appropriate by the director, industrial relations division, he may include a post office member of the review group.
- b. The director, industrial relations division, should advise the postmaster, prior to a visit by the review group, the reasons and purpose of the review. It may be appropriate to furnish information relating to the guides and the method to be used in conducting the review.
- c. The review group should meet with the postmaster and key members of the post office personnel and operations staff to discuss the review in further detail. The group should also provide for a consultation with the postmaster and interested employee organization representatives. This meeting may be either prior to or after the review, depending on local preferences.
- d. The review group should interview employees of the personnel section and any employees, organizationally located elsewhere, doing personnel work. When the post office has an Establishment Board, the review should include positions, if any, of Executive Secretary and staffs. When the post office is an examining point without an Establishment Board, the review should include the position, if there is one, of Civil Service Examiner-in-Charge. Interviews should disclose what personnel

functions are being performed, who is performing them, where they are being performed, the amount of time being spent on their performance, and the effectiveness of their performance. Incident to the interviews, the review group should check on the adequacy of facilities and equipment for performing these functions.

- e. The review group should draft summary statements of its findings on each personnel management activity, such as training, employment, placement, and incentive awards.

5. Development of Proposed Organization

- a. Determine the form and size of personnel management organization allowed by the guides in 844.4, Postal Manual, including both the total number of positions and the number of positions in PFS-7 and above.
- b. Draft a proposed organizational alinement that will provide staffing for the personnel management functions. Personnel assistant positions, with responsibilities in more than one function, may, in some cases, be more suitable than specialist positions in a single function. Positions should not be established solely because the criteria permit, but only when justified on the basis of need to perform functions of the organization.
- c. Post Office Establishment Board personnel and those with related Civil Service examining functions are included in the personnel office organization structure though not necessarily counted against the criteria. The work of the Civil Service Examiner-in-Charge should be integrated to the extent possible with the personnel activity. In applying staffing guides, review each position to determine after organization analysis whether the position:
 - (1) Requires full time and attention to Civil Service examining functions.
 - (2) Is a combination of Civil Service examining and non-personnel functions.
 - (3) Is a combination of Civil Service examining functions and personnel duties.
 - (4) Is one where Civil Service examining functions can be absorbed in the personnel section.

Positions identified with (1) or (2) are not counted as part of the allowance of total number or number of PFS-7 or above positions permitted by the staffing criteria. Positions identified with (3) or (4) will be counted as personnel section positions in applying the staffing criteria.

- d. Assure that the proposed organizational alignment represents the views of all interested regional office divisions.
- e. Meet with the postmaster and his principal personnel and operations staff to present the findings of the review group and the proposed organizational alignment stemming from the review. Discuss any questions and explain what the post office needs to do in requesting organizational and complement changes. Make sure the postmaster understands he is expected to present to the regional office a request which reflects his best judgment after due consideration of the alignment proposed by the review group. His request should include:
 - (1) A chart of the proposed personnel management organization, showing all positions.
 - (2) Descriptions of the positions in the proposed organization having either non-standard assignments or assignments the content of which is not specifically disclosed by mere citation of standard position numbers.
 - (3) A recommendation of the complement changes involved.
 - (4) A statement of reasons supporting the request.

(The chart to be included in the request could be either the identical chart presented by the review group or a variation of it, depending on the views of the postmaster). Inform the postmaster that his request should be forwarded to the director, postal operations division.

6. Regional Level

- a. The review group leader should furnish to the director, industrial relations division, and the director, postal operations division, a copy of the organizational alignment proposed to the postmaster, and a written statement of additional information as may be necessary to assure a full understanding of the status of the project.

- b. The director, industrial relations division, and the director, postal operations division, should examine this report of the review group's work with appropriate members of their respective staffs.
- c. Upon receipt in the regional office, the postmaster's request for complement change and request for position ranking should be processed in accordance with existing instructions.
 - (1) Any differences between the industrial relations division and the postal operations division not resolved by staff discussion should be settled by the directors of these divisions.
 - (2) Any differences between the regional office and the post office should be discussed with the postmaster and be resolved by the regional office.
- d. The director, postal operations division, should submit a report to the Director, Installations Management Division, Bureau of Operations, with a copy to the Assistant Postmaster General, Bureau of Personnel, showing the organization and complement changes endorsed by the regional office. This report should contain:
 - (1) Name of post office and date of review.
 - (2) Present and proposed complement of the personnel management organization.
 - (3) Proposed personnel management organization chart and total authorized employee complement of post office. The chart should show the title and salary level proposed by the regional office for every position in the proposed personnel management organization.
 - (4) Either a copy of description or a citation of standard description for every position in the proposed organization.
 - (5) Request for approval of complement changes requiring prior approval of Installations Management Division.

(6) Narrative explanation of proposed changes, with justification for deviations from the guides and for choices among alternatives within the guides.

e. Upon receipt of Departmental approval, the directors, postal operations division and industrial relations division, should proceed with appropriate actions to effectuate the approved plan, including notification to the postmaster on Form 1644 of approved complement changes and approved position rankings. In addition, the director, industrial relations division, should:

(1) Assist the postmaster in implementing the changeover to the new organizational alignment.

(2) Review status of the changeover after 3-month and 6-month periods.

III Employee Complement Control

A. Actions Required At The Regions

1. The chief, organization and standards branch, shall maintain Form 1832 and such other office records as may be needed to provide up-to-date information of the actions affecting the complements of post offices.
 - a. First-, second- and third-class post offices shall prepare in quadruplicate Form 1832 reflecting the number of positions authorized on the first day of each postal fiscal year. In addition, post offices with 50 or more employees shall prepare in quadruplicate Form 1832-A and an organization chart as of the same date. Three copies of Forms 1832 and 1832-A, and the organization chart where applicable, shall be submitted to the director, postal operations division, within 5 working days after the beginning of the postal fiscal year. One copy of each shall be retained in the post office until superseded.
 - b. The chief, organization and standards branch, shall make a prompt review of the forms to insure that they are complete, legible, accurate, and that the finance number of the post office is correctly listed.
 - c. He shall submit one copy of Form 1832 and any related forms to the Installations Management Division, Bureau of Operations, by the end of the first week in August each year.

2. The chief, organization and standards branch, shall prepare authorization and record of changes on Form 1644, Authorized Change In Complement, for the signature of the director, postal operations division. The form should include the following information:
 - a. Number of positions being authorized or reverted.
 - b. Titles and PFS levels for new or additional positions as well as for positions to be reverted.
 - c. Type of service under which positions are assigned, i.e., parcel post, collection service, etc.
 - d. Identify the unit in which positions are assigned, i.e., "Registry Section", "West End Station", etc.
 - e. Specify action as "Increase" for addition to existing complement; and "Decrease" for position (s) reverted.
 - f. Show "increases" and "decreases" on same form when both actions pertain to the same specific complement, and space permits.
 - g. Amend forms as necessary to identify complement totals properly as "supervisory", "clerks", or other.
 - h. Use "Remarks" to:
 - (1) Explain basis of action.
 - (2) Point out that authorization is not authority for increased hours.
 - (3) Indicate whether or not supervisory authorization increases clerical complement.
 - (4) Other pertinent statements.
 - (5) For supervisory changes only:
 - (a) Attach Forms 820 in duplicate for ranking action.
 - (b) When position is ranked, send Forms 1644 and 820 to postmaster.

3. A control number should be entered on each Form 1644 when required. The exact post office finance number must be shown in the appropriate block, and the appropriate change action block must be checked to indicate the type of change being effected.
4. Each Form 1644 should be serially numbered when the form is used to authorize an increase or decrease in the complement of any first-, second-, or third-class post office. In order that a uniform practice be maintained in serially numbering the forms, it is desired that the first form will be No. 1, preceded by the accounting period in which the form is issued. For example, the first form issued in A/P 1 shall be numbered "1-1"; the second form will be numbered "1-2", etc. In A/P 2, the form shall be numbered "2-1", "2-2", etc. This numbering system shall continue throughout the fiscal year and begin anew with the new fiscal year.
5. When Form 1644 is issued for purposes other than an actual change in complement of any employee category or designation code, the form need not be numbered and a copy need not be distributed to the Postal Data Center.
6. When authorizing changes in the complement of a post office, whether the Form 1644 is issued to the Postal Data Center, or the Postmaster, or both, complete information must be entered, including the net changes, and total authorized complement on Line 37.
7. When a Form 1644 is issued authorizing positions of a different title and different PFS level within the same designation code, no entries shall be made opposite the employee category, and neither shall a copy of the form be distributed the Postal Data Center as stated in Paragraph 5 above. A statement under "Remarks", such as "one General Foreman, Mails, PFS-9", is authorized in lieu of a "Foreman, Mails, PFS-7", will be sufficient to affect changes in titles and levels within the same category.
8. The authorization of both temporary indefinite and temporary limited (NTE) positions must be accomplished by the use of Form 1644 without exception. Also, it will be necessary to issue Form 1644 reverting temporary positions. Therefore, it will be necessary that a control file be established to insure the issuance of a Form 1644 reverting those temporary (not-to-exceed) positions on the expiration date of the authorization. Otherwise, the Postal Data Center will not be able to pick up the changes in this category of employment.

9. When a temporary limited (NTE) authorization is extended for an additional specified period, a Form 1644 should be issued without a control number and without entries on any of the numbered lines. The position (s) will be identified under the "Remarks" section of the form and the new period of authorization shown thereon.
10. When authorizing changes in the number of Annual Rate Regular positions, any resulting change in the corresponding career substitute positions must be entered on the same Form 1644.
11. When a new post office is established (other than fourth-class), issue Form 1644 for the positions authorized in each employee category and designation code under the column headed "Authorized Complement". In every instance, the columns must be totaled so that the overall complement will appear on Line 37. Check change block #2.
12. When a post office is discontinued (other than fourth-class), it will be necessary only to complete the heading of the form, and check block #3.
13. In the event a post office (other than fourth-class) changes name and finance number, two Forms 1644 shall be issued:
 - (a) One form shall be issued for establishment of a new post office as outlined in Paragraph 11 above.
 - (b) The other form shall be issued for the discontinued post office as outlined in Paragraph 12 above.
14. The net of all changes at fourth-class post offices, including establishment of new offices, discontinuance of existing offices, and changes in the number of rural carriers shall be reported on one consolidated Form 1644 each accounting period. This one form shall be identified as "All Fourth-Class Post Offices" in the block entitled "To Postmaster". The finance number "99980" and the Regional Code as assigned by the Postal Data Center shall be used. Check the appropriate block under "Change Actions". (Change actions 2 and 3 will not be used at any time for reporting changes in complements at fourth-class post offices).
15. Class advancements and relocations shall not be reported on Form 1644, except for advancements from and relocations to fourth class.

- a. If a fourth-class advances in class, one form shall be issued for establishment of a new post office as outlined in Paragraph 11 above. The corresponding reduction in complement shall be included on Form 1644 covering normal accounting period activity for all fourth-class offices. (Paragraph 14).
 - b. If an office relegates to fourth-class, one form shall be issued for discontinuance of an existing post office as outlined in Paragraph 12 above. The corresponding increase in complement will be included on Form 1644 covering the normal accounting period activity for all fourth-class offices. (Paragraph 4).
16. Distribute serially numbered Forms 1644 as indicated on each of the five copies. The copies for the Postal Data Center shall be held for forwarding as one group at the close of business each Friday in control number sequence. The transmittal slip must show inclusive control numbers.
 17. Upon receipt of the accounting period report of Status of Employee Complement from the Postal Data Center, an immediate review shall be made to determine that the combined figures given on each line (1 through 37) under columns headed "Complement Filled" and "Complement Under-Over" (vacancies and excesses), equal the figures given on the same lines under the columns headed "Complement Authorized".
 18. Promptly determine the cause for discrepancies and, if necessary, issue Form 1644 correcting any error (s) before the end of the accounting period.

B. Actions Required By Postal Data Centers

1. Prepare the following "Status Of Employee Complement" reports:
 - a. Detail reports for each first-, second-, and third-class post office in duplicate, except for the last accounting period in each quarter, when they will be prepared in triplicate.
 - b. Summary reports by regions and each class in each region in quadruplicate.
2. Prior to preparation of accounting period reports on Status of Employee Complement, the Postal Data Center will:
 - a. Update the complement control tape to include all complement changes covered by Forms 1644 issued through the last Friday of each accounting period.

- b. Update the payroll master tape to include all Forms 50 manually processed through the fourth Wednesday of each accounting period. Forms 50 received late are not included because of manual or machine processing difficulties.
3. The report on the Status of Employee Complement and summary cards should be prepared not later than the second Tuesday of each accounting period. The "net change" column on the Status Of Employee Complement represents the net of the increases and decreases authorized for each employee designation during an accounting period. The "Ending Complement" column represents the authorized complement at the end of an accounting period after adjustment of the prior periods' "Ending Complement" for the net changes. The "Complement Filled" column represents the complement on the payroll master tape. The "Complement Under-Over" column represents the difference between the "Ending Complement" and the "Complement Filled". This difference will be shown under the caption which applies to it. "Over" complement will also be indicated by two asterisks (**).
4. Distribute the Status of Employee Complement reports and summary cards as follows:
 - a. Original detail reports to Postal Operations Division.
 - b. Duplicate detail reports retained at Postal Data Center for two accounting periods.
 - c. Triplicate detail reports (prepared the last accounting period of a quarter) to postmaster.
 - d. Original summary reports and related summary cards to:

Director
Installations Management Division
Bureau of Operations
Washington, D. C. 20260

These reports must arrive at Headquarters not later than the second Wednesday of each accounting period.

- e. Duplicate summary reports to Postal Operations Division.
- f. Triplicate summary reports to Regional Controller.
- g. Quadruplicate summary reports retained at Postal Data Center for two accounting periods.

IV. Instructions Superseded

This issuance supersedes sub-chapter 362, Regional Manual and Regional Letters ~~66-93~~, dated 6-3-66; ~~66-111~~, dated 7-21-66; ~~66-117~~, dated 7-28-66; and 66-145, dated 10-3-66.

OK
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W. M. Krueger
Assistant Postmaster General