# Management Instruction

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Delivery Services Department

| Title | Signature & Title |
|---|---|
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| Customer Services Management Data System (CSMDS) | Assistant Postmaster General |

## I. Introduction

### A. Purpose

The Customer Services Management Data System (CSMDS) is an information system that provides efficient data collection and analysis methods to support management decision-making and to measure performance in customer services and delivery operations. CSMDS includes data gathering, analysis, and reporting for use in planning, budgeting, and management review of these operations.

### B. Scope

*1. Use of Form 3930 at the Unit.* Use of Form 3930, *Operations Analysis, i s* mandatory in all delivery and customer services units of city and rural delivery offices. This includes stations and branches, postal finance units, carrier annexes, detached post office box units, and computerized forwarding and central markup sites. Contract stations and branches and community post offices are not included. MOD I and MOD II offices include mail and post office box distribution hours used only in stations and branches or at non mail processing facilities that function as stations. These instructions do not apply to mail or post office box distribution at MOD I and MOD II main post offices.

*2. Optional Use of CSMDS at the MSC.* Although completion and use of Form 3930 is required at the unit level (station, branch, etc.), submission of the form to the MSC and use of CSMDS at the MSC are optional. Each division will determine the extent to which its MSCs will participate in the system. The guidelines provided in these instructions pertain primarily to those utilizing the system to its fullest extent.

## II. Management Responsibilities

### A. Division General Manager/Postmaster

The division general manager/postmaster determines the extent of participation in CSMDS by subordinate Management Sectional Centers (MSCs) and subordinate offices outside MSCs. For offices outside MSCs, the division general manager/postmaster must perform the functions of an MSC manager as outlined in II.B.

### B. MSC Manager

The MSC manager is responsible for continuing use of the system. MSC managers must arrange for all necessary training, provide support to managers in associate offices, stations, branches, and computerized forwarding system/central markup unit (CFS/CMU) sites, and ensure that all levels of

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management understand and use the system properly.

**C.** Postmaster

The postmaster is responsible for implementing CSMDS in CFS/CMU, delivery, and customer services units and for ensuring that these procedures are used in all reporting units.

**D.** Reporting Unit Manager

Managers of the reporting units are responsible for maintaining CSMDS is their units and ensuring the system is used to achieve the maximum benefits possible.

## III. System Overview

**A.** Operational Documents

The following documents, although completed for other functional reasons, also constitute a major source of data for CSMDS. They are listed here as information only.

   *1.* City Delivery Offices

      a.    Form 1412-A, *Daily Financial Report*

      b.    Form 3921, *Daily Delivery Unit Volume Recording Worksheet* (or programmable calculator printouts)

      c.   Form 3922, *Daily Customer Services Unit Volume Recording Worksheet* (or programmable calculator printouts)

      d. Form 3997, *Unit Daily Record*

   *2. Rural Delivery Offices.*    Form 3921, *Daily Delivery Unit Volume Recording Worksheet*

   *3. CFS/CMU Sites*

      a.   Form 2345, *Personnel Manpower -- MOD*

      b. Statistics Print Report

**B. CSMDS** Documents

   *1. General.*   CSMDS relies on basic data collection and analysis forms used primarily at the operating level and on

data input forms, which are used to submit actual and plan data to the MSC. All units in city and rural delivery offices complete data collection and analysis forms. Procedures for completing these forms and for submitting data input forms (where required) are outlined in IV.

   *2. Data Collection and Analysis Forms*

      a.   Form 3925, *Daily Address Information Operations Analysis.* CFS/CMU sites use Form 3925 to record and analyze actual and plan data on address information operations.

      b. Form 3930, *Operations Analysis.* Units in offices with city and rural delivery service gather data on Form 3930. Form 3930 is used for recording and analyzing operational data. It is an in-house form which is not normally submitted to the MSC.

   *3. Data Input Forms*

      a.  Form 3931, *CSMDS Input Sheet (Weekly Actual Data).*   Form 3931 is used by delivery and customer services units to report actual weekly total data to the MSC. After entry into the computer, this data forms the basis of analyses generated by the MSC.

      b. Form 3932, *CSMDS Plan Input Sheet.* Form 3932 is a utility form that may be used to submit delivery and customer services planned workhours and workload to the MSC computer site if other local forms or printouts showing weekly plan data are not available or do not exist. The CFS/CMU plan data is submitted on Form 3925.

      c.   Form 3925, *Daily Address Information Operations Analysis.* Form 3925 is used by CFS/CMU site managers to report weekly totals to the MSC. The weekly total column must be completed.

**C.** Collecting Data

   *1. Basic Data.*   Certain basic data is gathered and used daily, weekly, and each accounting period to analyze operations.

Same period last year (SPLY) and plan data may be used to make comparative analyses with actual data.

*2. Same Period Last Year (SPLY) Data.* Unit managers may choose to record SPLY data at the top of Form 3930 for comparison to current actual performance. It is not required. SPLY data is maintained automatically by the computer system and is available on reports.

*3. Plan Data.* Total fiscal year plan data will not change once budget allocations have been approved, unless authorized during periodic reviews. Plan data will be spread to accounting period and weekly figures. Daily plans are optional and may be used at the unit level to facilitate analysis and comparison with actual performance.

*4. Data Elements.* Data elements consist primarily of workload, workhours, overtime and leave usage.

*5. Periodic Data Reviews.* It is important that all data entries be timely and accurate. Postmasters and MSC managers must make periodic reviews to verify the accuracy and timeliness of all data.

**D.** Analyzing Data

An essential part of CSMDS is daily, weekly, and accounting period analysis by the managers responsible for each operation. Following are several types of operational analysis that responsible managers may perform.

*1. Workhours.* Compare actual workhours with planned and SPLY hours for each function.

*2. Workload.* Analyze planned, SPLY, and actual workload data to help determine probable causes of operational deficiencies, to spot trends and changes in mail flow and mix, and to forecast future trends.

*3. Efficiency Indicators and Productivity Figures.* Calculate efficiency indicators and productivity figures daily, weekly, and

by accounting period and compare them to plan, SPLY, or local goals. These calculations indicate the relative efficiency and productivity of operations and serve as indicators of operational irregularities.

*4. Overtime.* Calculate overtime percentages and use them as a guide to manage workhours efficiently. Local, MSC, or division managers establish overtime percentage goals.

## IV. Procedures for Completing and Submitting CSMDS Forms

**A.** General

Detailed instructions for completing Forms 3930, 3931, and 3932 are printed on the reverse side of each form. The guidelines provided below outline optional and required information.

**B.** Form **3925,** *Daily Address Information Operations Analysis*

All CFS/CMU sites complete the data elements and entries per the instructions provided in Notice 225, *How to Complete Form 3925*, and submit the form to the MSC weekly. Form 3925 includes weekly plan workhour and volume data.

**C.** Form **3930,** *Operations Analysis*

*1. Reporting Units with 10 or More City Delivery Routes.* Complete all the items as outlined on the reverse of the form. Report actual data daily and plan data weekly. SPLY data is optional.

*2. Reporting Units with Less Than 10 City Delivery Routes.* Complete all items weekly. Charge all city delivery and collection hours to either letter route office, letter route street, or router office time. SPLY data is optional.

*3. Reporting Units with Rural Delivery Routes Only.* Complete the rural route volume line entry weekly.

**D.** Form **3931,** *CSMDS Input Sheet (Weekly Actual Data)*

MSC/division reporting units participating in the computerized CSMDS, submit Form 3931 to the MSC weekly. Certain weekly totals are copied from Form 3930. See the instructions on the reverse of Form 3931. Data in the middle section of the form is available from other records at the reporting unit. Units with rural routes will generally report only rural route hours and volume.

**E.** Form **3932,** *CSMDS Plan Input Sheet*

MSC/division reporting units participating in the computerized CSMDS submit delivery and customer services workload and workhour plan data on Form 3932 if no other means exists for providing the data to the computer site. There is no fixed schedule for completing Form 3932 because plan data may be entered in advance. However, the plan through the current week must be loaded before meaningful reports can be generated.