

Management Instruction

Function 4 Standardized Customer Service Workload Reporting System

This Management Instruction (MI) establishes the national policies and procedures for recording and reporting daily customer service workload information within Post Offices and station and branch operations.

Introduction

Purposes

The purpose of this instruction is to:

- To establish standardized measurement methods for all Post Offices, stations, and branches to ensure accurate workload reporting.
- Establish procedures to be used for automated end-of-run (EOR) data to increase reporting accuracy.
- Provide standardized procedures for measuring, counting, and converting mail volume into piece count for customer service operations.
- Assist managers in projecting workload trends so they can effectively budget, staff, and schedule in their units.
- Support the establishment of a national base workhour and workload requirement for all customer service operations.

Scope

All Post Offices, stations, branches, Postal Service retail finance units, carrier annexes, detached Post Office box units, delivery distribution centers, delivery distribution units, and all other customer service operations must use these procedures for recording and reporting customer service workload.

Division of Responsibility

Area Vice President

Area Vice Presidents are responsible for implementing and ensuring continued compliance with all provisions of this instruction.

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Unit	Delivery and Post Office Operations



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District Manager

The district manager must:

- Ensure that the necessary training is provided to all employees responsible for compliance with all procedures outlined within, including the use of volume data gathered to make decisions.
- Instruct and support subordinate managers at the District level and in Post Offices, stations, and branches to ensure that all levels of management understand and follow this instruction.

Managers, Operations Programs Support; Managers, Post Office Operations; and Postmasters Who Report Directly to the District Manager

Managers, Operations Program Support; Managers, Post Office Operations, and Postmasters who report directly to the District Manager are responsible for:

- Ensuring that the following procedures from this instruction are followed.
- Ensuring the proper use of the data for decision-making purposes.

All Other Postmasters; Managers, Customer Service Operations; Managers and Supervisors, Customer Service

All other Postmasters; Managers, Customer Service Operations; Managers and Supervisors, Customer Service are responsible for:

- Ensuring procedures used to measure and record daily workloads are consistent with this instruction.
- Utilizing the volume data gathered for decision-making purposes to achieve the maximum benefit possible.
- Maintaining the integrity of the recorded data.

Note: Postmasters are responsible for approving any requests to allow an employee, other than management, to measure and record daily mail volumes.

Use of Volume Information

General

- To effectively manage a unit, you must evaluate the workload every day. You may do this by reviewing the volume data for automation, manual distribution, and Post Office box distribution and then matching the workhours to the workload.
- Unit managers will review and monitor the daily work performance of each employee while evaluating the daily workload of the unit. Clear unit goals and expectations must be shared with all employees in the unit.
- Daily piece counts, recorded in accordance with these procedures, may be used in conjunction with other management records and procedures to monitor the clerk's performance and

to assist supervisors in identifying and correcting performance deficiencies.

Post Office Box Distribution

Accurate daily recording of mail volumes received for distribution into Post Office boxes and knowledge of existing variables enable the manager to project workhours needed to distribute that volume of mail.

Volume Recording

General

- All volume that is received in the Customer Service distribution unit and Post Office box section will be reported as piece count. Mail received with EOR information, either in hardcopy or electronic form, will not require linear measurement. All nonautomated volume will be counted utilizing the instructions contained in this MI. Once mail is measured linearly, all volumes will be converted to pieces utilizing the national standard conversion rates for each type of mail and recorded on PS Form 3922, *Customer Services Volume Recording Worksheet*.
To ensure the proper linear measurement of letter and flat volumes, the mail must be compressed as it is being measured and recorded as directed in these instructions to facilitate accurate recording.
- Linear volume entries may be used only for letters and flats requiring manual distribution and not included in any type of EOR reports currently received from automation. Linear volume is to be measured in inches.
- Workload and productivity are based upon the accurate collection of data related to mail volume, whether by measurement or from EOR reports received through automation. Accurate workloads will allow the manager to determine proper staffing and scheduling, and to appropriately match the workhours to the workload.
- For standardized linear volume recording measurement procedures, letter/flat volume in Function 4 distribution operations mail must be measured as follows:
 1. When linearly measuring mail volume, measure each compressed tray or container in inches prior to placing it in distribution operations. Where reasonable, consolidate trays to ensure that a sufficient quantity is measured to represent a major unit of measurement. All total linear measurements are to be summed and recorded by type.
 2. For mail moving from automated distribution operations, to manual operations, record information from EOR reports provided by the plant, delivery distribution center (DDC), or local automation operation. Record EOR data only for mail requiring further distribution.

3. Establish a procedure for obtaining EOR reports from the processing unit and/or identifying the appropriate data. Delivery point sequence letters and flats, sector/segment, and no linear measurement (NLM) mail are the types of mail to record in Function 4 operations as indicated on EOR reports.
 - FLASH data input should include applicable EOR piece counts and all manual volume recordings totaled in inches and converted to pieces. Conversion rates for reporting are as follows:
 - 19 pieces per inch for letters (227 pieces per foot)
 - 9.5 pieces per inch for flats (115 pieces per foot)
 - Mail Arrival Profiles: Each unit will record on a daily basis all mail volumes, by type, that arrive on all incoming trips including unscheduled and emergency trips.
 - There may be a documented local need or reason to provide for unit variance authorized by the Area Manager, Delivery Program Support, or the manager's designee.

PS Form 3930

Transfer recorded volumes daily to PS Form 3930, *Operations Analysis*, using the following guidelines:

1. Line 40, Letter-Size Mail: Total the linear measurement of manually distributed mail, including missorts, measured in inches and convert to pieces. This includes letters manually distributed for downstream offices in SCF operations and secondary letter distribution. **Note:** Secondary letter distribution must be approved by the District Manager as a result of a Function 4 review.
Line 40 total should also include any automated volume, from EOR, that requires manual distribution.
2. Line 41, Flat-Size Mail: Total the linear measurement of manually distributed mail, including missorts, measured in inches and convert to pieces. This includes flats manually distributed for downstream offices in SCF operations and secondary flat distribution. **Note:** Secondary flat distribution must be approved by the District Manager as the result of a Function 4 review.
Line 41 total should also include any automated volume, from EOR that requires manual distribution.
Line 41, Irregular Parcels and Pieces (IPPs): Credit as one piece per IPP (no conversions) if received in a container separate from parcels and record as a flat.
3. Line 43, Parcels: Total the piece count after conversion. (Container conversions currently include IPPs. Do not separate from the container for the purpose of subsequent handling.) Include drop shipment parcel volume from PS Form 8125.
4. Line 46, Box Manual Letters: Total the linear measurements in inches and convert to pieces. Add any automated volume, from EOR, excluding DPS. Use mailer attached facing slips to obtain piece counts for sequenced sets. A saturated mailing should be

recorded in pieces by crediting one piece per rented box. Include only volumes walled or distributed into PO Boxes.

5. Line 47, Box DPS Letters: Enter the total pieces from EOR reports minus any firm direct trays or bundles. Include only volumes walled or distributed into PO Boxes.
6. Line 48, Box Flats: Total the linear measurements in inches and convert to pieces. Add any automated volume from EOR. Use mailer attached facing slips to obtain piece counts for sequenced sets. A saturated mailing should be recorded in pieces by crediting one piece per rented box. Include only volumes walled or distributed into PO Boxes.
7. Line 50, Box Parcels: Enter the total piece count.
8. Line 67, Automated Letter Volume: Enter the total pieces fed on automated equipment in customer service operations, i.e. CSBCS and DBCS. The total pieces fed includes carrier route, sector/segment, DPS, box section, directs, etc.
9. Line 68, Automated/Mechanized Flat Volume: Enter the total pieces fed on automated and/or mechanized equipment in customer service operations, i.e. AFSM 100 and FSM 1000. The total pieces fed includes carrier route, sector/segment, box section, directs, etc.

Volumes Not Recorded as distribution volume:

- Direct bundles and direct trays (mail not requiring further handling or verification) before presentation to the letter carriers or customers.
- Mail being riffled to check for errors.
- Accountables.

Parcels are to be recorded as currently outlined in Handbook M-32, *Management Operating Data System*. It is recognized that IPPs arrive frequently commingled with parcels. The container capacity is based on pouches. Record parcel volumes using the container conversion charts. These charts apply only to Function 4 parcel volume recording and are not to be used in the recording of Function 2 parcel volume by route.

Note: Handbook M-32 was updated March 2009 and is available for download from <http://blue.usps.gov/cpim>.

National Container Conversion Rate

Parcels – Mixed Containers

Containers of large outside parcels, machineable parcels, and IPPs.

Equipment	Full	3/4	1/2	1/4
Orange Sack	10.89	8.17	5.45	2.72
U-Cart	10.62	7.97	5.31	2.66
Medium Hamper (1033)	19.23	14.42	9.62	4.81
Large Hamper (1046)	42.50	31.88	21.25	10.63
GPMC/APC/ERMC	85.00	63.75	42.50	21.25
Wiretainer	85.84	64.38	42.92	21.46
Pallet 4'	136.70	102.53	68.35	34.18
OTR/BMC	170.00	127.50	85.00	42.50
Gaylord 5'	283.30	212.48	141.65	70.83