

November 30, 2005

Ms. Pat Williams
Assistant Director
Clerk Division
American Postal Workers
Union, AFL-CIO
1300 L Street, NW
Washington, DC 20005-4128

Certified Mail Number
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Dear Pat:

This letter is in response to your November 7, 2005, correspondence requesting information regarding administration of various personnel processes through the Human Resources Shared Services Center (HRSSC). As indicated in your letter, you had previously requested this information during a prior meeting, but as Jack Green of my staff explained during various conversations with Jim McCarthy, the list is very extensive requiring a great deal of review and research in order to adequately respond. This is especially true since operation of the HRSSC is very new and, although much planning has gone into improving employee service's, improving efficiency of personnel services, and ensuring compliance with the National Agreement and Local Memoranda of Understanding, there are some things which can only accurately be determined once the operation is activated.

The following information responds to each of the issues which you raised in your letter. It should be noted that many of the inquiries concerned provisions of a local Memoranda of Understanding and not requirements of the National Agreement. This document does not provide any new provisions or interpretation of Local Memoranda of Understanding.

Job Bidding

- *Face-to Face Meeting on Vacancies (28 Day Bid cycle) – Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*
- *Changes to Duty Assignments (Off days, hours, posted in different section, days off, hours, sections, pay locations, comments qualification standards, etc. – It is currently anticipated that each District Human Resources Office will have a local services person to oversee and assist in management of local requirements regarding bid administration. This person, or designee, will ensure local issues*

are addressed and will communicate the required modifications to the Shared Service's Center (SSC).

- Final Face-to-Face Meeting Prior to Vacancy Going to Printer - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice.
- The local services designee will be a resource for assisting in areas needing resolution.
- Pulling bids from Vacancy Notice – This question is not clear. If it is intended to ask “does the system have the capability to remove a specific job from a specific posting”, then the answer is yes.
- Training Unit and Personnel Correspondence (Training unit 4 within 5, live record, bidding restrictions, who is doing the training) – Whether the employee completed 4 hours within 5 days and other documentation pertinent to the determination of whether the next senior bidder or the next senior qualified bidder will be selected will be traced in the new system. Live Record and bidding restrictions will be tracked in the new system. The District training office will still manage employee training and monitor progress.

Unassigned Process Meeting Face To Face

- Determine Unassigned Employees – When an employee is identified by local procedures as Unencumbered, that status will be entered into the new system and tracked.
- Determine Residual Vacancies – The National Agreement has specific rules pertaining to the process of duty assignment that are considered residual. All rules that can be automated are being programmed into the new system. Where a step in the process cannot be automated, the SSC will interact with the local services person or designee.
- Determine Residuals to be offered – This will be part of the new system and will meet National and Local requirements. Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice.
- Review Residual Bid Sheet (A drafted letter prior to sending out) - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.
- Review Awarding Process (Face to Face) - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.
- Determine Who Qualified for Jobs – Data concerning employee qualifications is being transferred from the old system. The training unit remains the source of employee qualifications as well as information in the data base. The local services designee will be a resource for assisting in areas needing resolution.
- Review Award Notice prior to Posting - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.

History of Bids

- Reversions – *Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*
- Tracking of Duty Assignments (Copies of Newly Established, Reposted Positions, Abolished Positions, Reverted Positions, Withheld Positions, etc.) - *Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*
- Tracking Employee Status (Live Record, Retreat Rights, Saved Grade, Pending Qualification) – *As each office is converted to the new system, we are planning to enter data which is currently monitored manually so that it may be tracked via automation to the maximum extent possible. That data will be maintained in a current status via a coordinated effort between the SSC and the local services designee.*

Requests for Information, Personnel Reports - *A local process is being developed to respond to union requests for information. It is expected that the union would contact a designated local management representative to coordinate information needed from the SSC.*

- Bid History Reports and (Employees) – *Those bids and postings which were processed in the old system will be captured and placed into Archives from which the data can be retrieved in report format. As history accumulates in the new system, reports are available that will provide the information required. Also, employees will continue to be able to review their bid history via Web Bidding as the data accumulates.*
- Form 50's – *What is the intent of this question? A local process is being developed to respond to union requests for information. It is expected that the union would contact a designated local management representative to coordinate information needed from the SSC.*
- Qualification List for Employees – *The SSC will have access to the qualification catalogue in the system. They will also be able to access this information by individual employee. It will be necessary for the training office to contact the SSC to update an individual's qualifications as a result of training until the system is automated to perform this function.*
- Seniority Lists – *Seniority data is being transferred into the new system. Local management will be responsible for printing and posting.*
- Promotion Eligibility Register (Maintenance) – *The maintenance bidding portion of the system has not yet been developed. The system will comply with the National Agreement and local Memoranda of Understanding.*
- Preferred Assignment Register - *The maintenance bidding portion of the system has not yet been developed. The system will comply with the National Agreement and local Memoranda of Understanding.*
- Senior Bidder Lists – *Reports required by the National Agreement or Local Memoranda of Understanding will be available. Although reports may be*

formatted somewhat differently than in the current system, they would contain required information.

- *To and From Reports (Bidding) (Bid coming from/going to bid sheet - Personnel Change Order) - Reports required by the National Agreement or Local Memoranda of Understanding will be available. Although reports may be formatted somewhat differently than in the current system, they would contain required information.*
- *Copies of Official Personnel Folder's (OPF's) – Employees may continue to request to view their own OPF via whoever is the custodian of that record (i.e., Postmaster/Manager, local Personnel Services Office, or the local services designee or SSC in the future.) At this time local offices will follow established practices with regard to providing copies.*
- *Transfer Lists/Hiring Register – A local process is being developed to respond to union requests for information. It is expected that the union would contact a designated local management representative to coordinate information needed from the SSC. The HRSSC will utilize eReassign to provide any union requested reports regarding reassignment lists not available locally to the installation head.*
- *Hiring Register – The hiring portion of the system has not yet been developed.*
- *Hiring Worksheets (Application Process) - The hiring portion of the system has not yet been developed.*
- *Notice of Rating from Test – Notice of Ratings will be produced by HCES.*
- *Office Memos (Retirements, Reassignments, NOA) (Leaving from and entering craft) - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*

Compliance with Collective Bargaining Agreements (CBA), Local Memoranda of Understanding (LMOU), Local Settlements

- *Removal of Discipline from OPF (done), information purged date) and sent back to the union – Maintenance of OPF's will be the responsibility of the custodian of that record;, i.e., Postmaster/Manager, local Personnel Services Office, or the local services designee or SSC in the future. Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*
- *Lump Sum Settlements Affecting Entire Craft – (Personnel provides necessary information to process settlements) - Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution. It is anticipated that information previously provided by the local personnel office will be provided by the SSC.*
- *Settlements Dealing with Employee's Jobs (Transfers, Promotion Eligibility Register, Preferred Assignment Register, Reinstatements, Reassignments, Improper Awarding of Duty Assignment, Clothing Allowances, Uniform Allowances) – Coordination of compliance with settlement agreements will be dependent upon specific language in the settlement agreement. The local services designee will be a resource for assisting in areas needing resolution.*

General Problems

- Testing for In-Service Exams – *The local services designee will have responsibility for coordinating this activity.*
- Scheduling Exams (In-Service) - *The local services designee will have responsibility for coordinating this activity.*
- Where Will Tests be given - *The local services designee will have responsibility for coordinating this activity.*
- Notice of Rating Related to Exam – *Notice of Ratings will be produced by HCES.*
- Custodian of Records – *The nature of this question is unclear. What records are being referred to and for what purpose?*
- Reassignments (Where will Union Access Information) – *Union requests for information should be submitted to the appropriate Installation Head or designee for processing. Meetings and information provided to the local union will be determined by provisions of local Memoranda of Understanding and/or binding past practice. The local services designee will be a resource for assisting in areas needing resolution.*
- Submitting Change of Address - *Employees are encouraged to submit Changes of Address through the Personnel Services Kiosk or Lite Blue. Otherwise employees may submit the Change of Address via PS Form 1216 to the HRSSC.*
- Requesting Change of Address for Union Records – *The question is unclear as to what organizational level of the union and for what specific purpose. Additionally, what is the specific contractual requirement?*
- Benefits (Health and Life Insurance) – *For open season employees are encouraged to use PostalEase through the Interactive Voice Recognition system (IVR), Personnel Services Kiosk, or Lite Blue. For changes due to Qualified Life Events, Life Insurance and other benefits issues will be handled through the HRSSC.*
- Thrift Savings Plan (TSP) – *For Open Season enrollment, change, cancel; or TSP Catch-up enrollment, change, or cancel; employees are encourage to use PostalEase through the Interactive Voice Recognition system (IVR), Personnel Services Kiosk, or Lite Blue. TSP changes in the 5 funds allocations must be completed directly through www.tsp.gov.*

Retirements

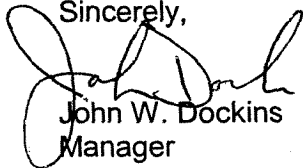
In your letter you stated, “in reviewing the ELM Section 569.141 Objectives and Responsibility- It states; ‘...district managers are responsible for ensuring that at least one group retirement counseling seminar is held each fiscal year for employees within 3 years of optional retirement eligibility.’ And ‘Group counseling is supplementary to, but not a substitute for, individual counseling prescribed in 569.12.

You also stated, “It further states in Section 569.142 Location and Participation, ‘...Group counseling sessions may be held on Postal Service premises, if available, or in any other available place. Employees within 2 to 5 years of retirement age and employees actively considering retirement are encouraged to attend. Participation is voluntary and off-the-clock and may include husbands and wives. The important aspects of retirement may be adequately covered in approximately six to eight session of 2 hours each.”

You then ask, "Under the Shared Service/Accounting Implementation" is the agency unilaterally changing these above cited provisions of the ELM?" *On a minor point of correction, this initiative is not "Shared Service/Accounting". It has been and is now referred to as Human Resources Shared Services or Postal People. It is a separate initiative from Shared Services Accounting which occurred a number of years ago. The Postal Service is not unilaterally changing provisions of the ELM. Group counseling sessions and individual counseling will be provided in accordance with the ELM. As information, individual counseling is not required to be face to face which has never been the intent of the ELM.*

If you have any questions concerning this matter, please contact Jack Green of my staff at (202) 268-8300.

Sincerely,

A handwritten signature in black ink, appearing to read "John W. Dockins", written over the typed name.

John W. Dockins
Manager

Contract Administration (APWU)