

## CLERK CRAFT LEAD CLERK QUESTIONS & ANSWERS

*These questions and the responses are not intended to alter, amend, or change in any way the terms of the 2010-2015 Collective Bargaining Agreement.*

1. How will the Lead Clerk duty assignments be created?

**Answer:** They will be newly created duty assignments posted for bid installation wide to the senior qualified bidder, in accordance with Article 37. Exception: Per item #2.C of the Clerk Craft Jobs MOU, existing LSSA's, Window Service Technicians and other existing clerk craft positions of a similar nature identified by the parties shall be grandfathered into the new position of Lead Clerk.

2. At what level will the Lead Clerk duty assignments be created?

**Answer:** They will be created at one level above other employees in the group. Lead Clerks will provide oversight, direction and support, in the absence of Supervisory presence to a group of bargaining unit employees.

3. Will the Lead Clerk have access to TACS records (clock rings) and can they make adjustments?

**Answer:** Yes, with the approval of the supervisor.

4. Will the Lead Clerk duty assignment have a principal assignment area?

**Answer:** Yes, in accordance with Article 37. However, the designation of a principal assignment area shall not impact the number of Lead Clerk positions, which are determined by the MOU ratio. In addition, based on operational needs, the Lead Clerk in Mail Processing could be directed to temporarily lead another group of clerks within the same facility and function, provided, when working in another area the movement is in accordance with the 2007 JCIM, Article 37, Q&A #142, as cited below:

142. *Are full-time Mail Processing Clerks PS-06 limited to working only in their principal assignment area or can they be assigned to perform work in other mail processing areas?*

**Response:** *Management may assign employees in accordance with operational needs and the employee's qualifications. However, if there is more than one Mail Processing Clerk working in a principal assignment area with the necessary skills, management will move Mail Processing Clerks out of their principal assignment area as needed by juniority.*

5. How will the Lead Clerk be scheduled for overtime, holiday scheduling, leave, etc.?

**Answer:** They will be scheduled in accordance with the LMOU and Collective Bargaining Agreement.

6. Can the Lead Clerk issue discipline or approve leave?

**Answer:** No.

7. Is the ratio of Lead Clerk assignments in the clerk craft complement in a facility based on the entire facility or by tour?

**Answer:** Facility clerk complement.

8. If there are five clerks in any facility, must a Lead Clerk duty assignment be created?

**Answer:** Yes, in accordance with item #2 of the Clerk Craft Jobs MOU which states, "The Employer will fill duty assignments of a Lead Clerk in any facilities where clerks work without direct supervision and in facilities that have a minimum complement of five (5) clerks."

9. Will Lead Clerk duty assignments be created in facilities where clerks work without direct supervision, even if there are less than five clerks?

**Answer:** Yes, in accordance with item #2 of the Clerk Craft Jobs MOU which states, "The Employer will fill duty assignments of a Lead Clerk in any facilities where clerks work without direct supervision..."

10. Can you have a Lead Clerk duty assignment in CFS?

**Answer:** The parties agree that upon consultation with the Union at the National Level, Lead Clerk positions may be created in certain assignment areas with specific qualification requirements (example: CFS). However, the creation of these Lead Clerk duty assignments shall not impact the number of Lead Clerk duty assignments in the facility, which are determined solely by the MOU ratio.

11. In post offices where the supervisor maintained the floor stock and that supervisory job is eliminated, may the floor stock be transferred to the LSSA?

**Answer:** Yes, if the supervisory position is eliminated and separation of duties are maintained consistent with postal regulations and policies.

12. How will higher level details be made to the Lead Clerk duty assignment?

**Answer:** Higher level details will be made in accordance with Article 25 of the Collective Bargaining Agreement.

13. What happens if as the result of an excessing event a clerk facility's complement changes.

**Answer:** If there is an increase in facility clerk complement resulting in an increase of Lead Clerk duty assignments, due to the ratio, then the Lead Clerk duty assignments will be created accordingly. If there is a reduction, then the USPS may reduce the number of Lead Clerk duty assignments based on the ratio, however the impacted clerk(s) would receive saved grade pursuant to Article 37.4.C.6.

14. May the USPS create more lead Clerk assignments than the ratio listed in the MOU?

**Answer:** Yes. The MOU lists the minimum number of Lead Clerk duty assignments required.

15. If a section is undergoing excessing and/or there are clerks with retreat rights to a section and level where Lead Clerk duty assignments are being posted, will the assignment be posted installation wide?

**Answer:** Based on Article 12 and the LMOU, Item 18, the posting may be limited to in-section bidding where the retreat rights are to a section and level.

16. Is there a difference between the Lead Sales & Services Associate (LSSA), and the Lead Customer Service Clerk (LCSC)?

**Answer:** Yes. The Lead Sales & Service Associate is utilized in a Function 4 facility with a retail/window operation. The Lead Customer Service Clerk (LCSC) will normally be utilized in a Function 4 facility that has no window/retail operation. In a large facility (50 or more clerks) with a retail window and a large distribution operation, there may be both based on operational needs and the MOU ratio. In this situation, you could have a Lead Sales & Services Associate for the window/retail, and a Lead Customer Service Clerk for the distribution operation, as operational needs require.

17. Are there any other current Level 7 clerk positions that can be grandfathered into Lead Clerk positions?

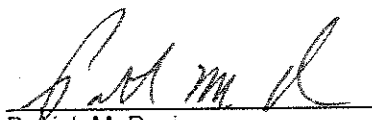
**Answer:** In accordance with Section 2.C of the Clerk Craft Jobs MOU, other existing clerk craft positions of a similar nature identified by the parties shall be grandfathered into the new position of Lead Clerk. This determination is made at the National Level.


18. Can Lead Clerk positions be posted as Non-Traditional Full-Time (NTFT) duty assignments?

**Answer:** Yes, provided they are posted in accordance with the Non-Traditional Full-Time (NTFT) Duty Assignments MOU. In Function 1 no more than 50% of all duty assignments in the facility may be NTFT duty assignments of 30-48 hours, unless otherwise agreed to by the parties. In Function 4, as many NTFT duty assignments as operationally necessary may be created.

19. What training and testing requirements will there be for the Lead Clerk positions?

**Answer:** Training will be provided, where necessary, to assist the Lead Clerk in providing oversight, direction and support to other employees and to perform administrative duties. It is anticipated that Lead Clerks will have, based on their experience, the ability to provide technical guidance to other employees.

  
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Date: May 4, 2012

**LEAD CUSTOMER SERVICE CLERK (P7-7)**  
**OCCUPATION CODE: 2320-XXXX**

**FUNCTIONAL PURPOSE**

Performs a variety of clerk duties required for customer service using automated mail processing equipment or manual methods of sortation and distribution as well as change of address entry / validation and processing undeliverable as address forwardable and return to sender mail. May work with or without direct supervision or as a working leader to one or more customer service employees resolving problems that may occur during operations and determining when a supervisor should be involved.

**OPERATIONAL REQUIREMENTS**

This position is for use in Customer Service facilities that do not have retail window operations. However, in a large facility (50 or more clerks) with both a retail window and a large distribution operation, a Lead Customer Service Clerk may be used in addition to a Lead Sales & Service Clerk.

**DUTIES AND RESPONSIBILITIES**

1. Makes primary and one or more secondary distributions of incoming mail by delivery point, (for example, classified or contract station or branch or other delivery unit, general delivery, lockboxes, rural, highway contract route, or city carrier route) based on a knowledge of the distribution scheme.
2. Makes primary and one or more secondary distributions of outgoing mail for dispatch (for example, by city, state, or region) based on a knowledge of the distribution scheme.
3. In addition, may perform any of the following duties: maintain records of mails; examine balances in advance deposit accounts; face and cancel mail; tie mail and insert facing slips; open and dump pouches and sacks; operate cancelling machines; record and bill mail (for example, c.o.d., registered, etc.) requiring special service; and provide service at public windows; data entry of change of address requests; process UAA forwardable / returns mail and the associated allied functions resulting from processing of UAA mail.
4. Maintains a working knowledge of regulations, policies and procedures related to mail processing and post office operations activities. Provides guidance to customer service employees assigned to post office operations. Resolves problems that may occur during operations and determines when a supervisor should be involved.
5. As a working leader of customer service employees, will cooperate with the supervisor to plan, direct, organize and monitor customer service related programs/projects and the work of people to meet unit goals, including coordinating and scheduling work hours.
6. May perform any of the following duties: provide service at public window for non-financial transactions; maintain records related to mail; examine balances in advance deposit accounts; and record and bill mail requiring special service.
7. Verifies mailings as to size, weight, postage and other mailability requirements when necessary.
8. Processes accountable mail for delivery and clears carriers and accountable mail.
9. Uses established safe work methods, procedures, and safety precautions.
10. Maintains and services PO Boxes; Caller and Reserves.

11. Performs required scans of packages with barcodes.
12. Performs other job related tasks in support of primary duties.

**SUPERVISION**

Supervisor, Customer Services or other designated supervisor

**SELECTION METHOD**

Senior Qualified

**BARGAINING UNIT**

Clerk

**LEAD CUSTOMER SERVICE CLERK (P7-7)**  
**OCCUPATION CODE: 2320-XXXX**

**BARGAINING UNIT QUALIFICATION STANDARD**  
**(2320-xxxx) CUSTOMER SERVICE CLERK**

DOCUMENT DATE: TBD

**FUNCTION:**

Performs a variety of clerk duties required for customer service using automated mail processing equipment or manual methods of sortation and distribution as well as change of address entry / validation and processing undeliverable as address forwardable and return to sender mail. May work with or without direct supervision or as a working leader to one or more customer service employees resolving problems that may occur during operations and determining when a supervisor should be involved.

**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 provide oversight, direction and support of co-workers in the absence of a supervisor.
2. Ability to communicate orally (refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information).
3. Ability to perform basic mathematical computations (refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers).
4. 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.
5. 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.
6. Ability to coordinate, open and close, and operate a postal unit. This includes planning and organizing the work of a small group of employees to achieve unit goals.
7. Ability to safely perform the duties common to the position.

**EXAMINATION REQUIREMENTS:**

Applicants must successfully complete Postal Service Test 473, which includes the following measures of job-related knowledge, skills, and abilities:

- A. Address Checking
- B. Forms Completion

C. Coding & Memory

EXPERIENCE REQUIREMENTS:

Applicants must have a minimum of one year experience in a customer service position.

PHYSICAL REQUIREMENTS:

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

ADDITIONAL PROVISIONS:

Lead Customer Service Clerks must work their assigned tour and days of work often within a customer service environment. Lead Customer Service Clerks must follow Postal Service policies and procedures for personal conduct at work, including adhering to rules and regulations.

Lead Customer Service Clerks at any time may be assigned to provide service to the public. They must maintain a neat and professional appearance and demeanor in such interactions, including wearing a uniform when required.

**LEAD MAIL PROCESSING CLERK (P7-7)**  
**OCCUPATION CODE: 2315-XXXX**

**FUNCTIONAL PURPOSE**

Performs a variety of clerk duties required to process mail using automated mail processing equipment or manual methods of sortation and distribution. May work with or without direct supervision or as a working leader to one or more mail processing employees resolving problems that may occur during tour operations and determining when a supervisor should be involved.

**DUTIES AND RESPONSIBILITIES**

1. Provides current scheme, schedule, and routing information, as required by the distribution function, to efficiently route mail, and meet dispatch schedules. Makes one or more sortations of outgoing and/or incoming mail using the appropriate sort program or manual distribution scheme.
2. On a rotational basis, may perform the following duties: loads mail onto automated equipment, culling out non-processable items; enters sort plan and starts equipment; monitors flow of mail to ensure continuous feed; sweeps separated mail from bins/stackers; and stops equipment when distribution run or operation is completed. Runs machine reports, clears jams and contacts maintenance for assistance when required:
3. Prepares work area, ensuring all necessary support equipment and materials, including labels, trays, and other containers are in place.
4. Removes sorted mail from bins or separations and places into appropriate trays or containers for further processing or dispatch based on knowledge of operating plans and dispatch schedules, or at the instruction of supervisors or expeditors; may riffle or verify mail to ensure sortation accuracy as needed.
5. Maintains a working knowledge of regulations, policies and procedures related to mail processing activities. Provides guidance to mail processing employees assigned to mail processing operations. Resolves problems that may occur during tour operations and determines when a supervisor should be involved.
6. As a working leader of mail processing employees, will cooperate with supervisor to meet established targets for identified goals. Will work to maintain efficiencies and meet dispatches based on the installation operating plan. Shifts employee in the group from one assignment to another, in accordance with the Collective Bargaining Agreement, to balance workload. Trains new employees in a specific area of specialization.
7. In addition, may perform any of the following duties as needed: provides service at public window for non-financial transactions; maintains records related to mail on hand and mail processed; examines balances in advance deposit accounts; and records and bills mail requiring special service; provides services in the receipt and dispatch of express mail; distributes, weights, computes, and processes all classes and types of postage due mail; maintains accounts and records; submits reports.
8. Uses established safe work methods, procedures, and safety precautions.
9. Performs other job related tasks in support of primary duties.

**SUPERVISION**

Supervisor, Distribution Operations; Supervisor, Customer Services or other designated supervisor



**SELECTION METHOD**

Senior Qualified

**BARGAINING UNIT**

Clerk

**LEAD MAIL PROCESSING CLERK (P7-7)  
OCCUPATION CODE: 2315-XXXX**

**BARGAINING UNIT QUALIFICATION STANDARD  
(2315-xxxx) MAIL PROCESSING CLERK**

DOCUMENT DATE: TBD

**FUNCTION:**

Performs a variety of clerk duties required to process mail using mail processing equipment or manual methods of sortation and distribution. May work with or without direct supervision or as a working leader to one or more mail processing employees resolving problems that may occur during tour operations and determining when a supervisor should be involved.

**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 provide oversight, direction and support of co-workers in the absence of a supervisor.
2. Ability to communicate orally (refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information).
3. Ability to perform basic mathematical computations (refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers).
4. 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.
5. Ability to safely perform the duties common to the position.

**EXAMINATION REQUIREMENTS:**

Applicants must successfully complete Postal Service Test 473, which includes the following measures of job-related knowledge, skills, and abilities:

- A. Address Checking
- B. Forms Completion
- C. Coding & Memory
- D. Personal Characteristics and Experience Inventory

**EXPERIENCE REQUIREMENTS:**

Applicants must have a minimum of one year experience in a mail processing position.

**PHYSICAL REQUIREMENTS:**

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

**ADDITIONAL PROVISIONS:**

Lead Mail Processing Clerks must work their assigned tour and days of work often within an industrial plant environment. Lead Mail Processing Clerks must follow Postal Service policies and procedures for personal conduct at work, including adhering to rules and regulations.

Lead Mail Processing Clerks at any time may be assigned to provide service to the public. They must maintain a neat and professional appearance and demeanor in such interactions, including wearing a uniform when required.

**LEAD SALES & SERVICES ASSOCIATE (P7-7)**  
**OCCUPATION CODE: 2320-XXXX**

**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 as a working leader, providing administrative and technical guidance to one or more clerks assigned to retail and post office operations.

**OPERATIONAL REQUIREMENTS**

This position is for use in Customer Service facilities with retail operation windows.

**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. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.
2. Communicates and provides administrative and technical guidance to retail and post office operations employees assigned to the unit, informing them of changes or clarifications in policies, procedures, operations, schedules, and regulations. Ensures that work is performed efficiently.
3. Forecasts and maintains a separate stamped inventory to fill requisitions submitted by other retail clerks assigned to the office.
4. Prepares a local bank deposit and/or a consolidated funds bank deposit. Prepares and maintains unit accounting records of retail activities.
5. 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.
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. Maintains an adequate supply of materials required for the operation of a retail office.
7. Processes and/or accepts and verifies applications for redeemed stamps and stamped paper. Prepares and submits necessary stock for destruction.
8. Instructs and advises individual employees in correct financial and retail sales procedures.

9. 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.
10. Provides product and service information to customers, including informing customers regarding special offers and the layout of the store; refers customers to sales and promotional programs by promoting products based on customer needs. Answers customer inquiries.
11. Maintains appearance of store by setting, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers. Checks and maintains post office self service equipment and postage meters.
12. Trains new employees to ensure quality service.
13. Maintains records, files and submits reports, as assigned.
14. May verify presort and bulk mailings of all classifications; computing and maintaining on a current basis mailers' credit balances.
15. In addition, may assign and clear accountable items and distribute mail as required.
16. Performs other duties as assigned.

**SUPERVISION**

Supervisor, Customer Services or other designated supervisor

**SELECTION METHOD**

Senior Qualified

**BARGAINING UNIT**

Clerk

**LEAD SALES & SERVICES ASSOCIATE (P7-7)**  
**OCCUPATION CODE: 2320-XXXX**

BARGAINING UNIT QUALIFICATION STANDARD  
(2320-xxxx) LEAD SALES & SERVICES ASSOCIATE

DOCUMENT DATE: TBD

**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 administrative and technical direction to one or more clerks assigned to retail and post office operations.

**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, matching products and services to customer needs, providing product information, creating/maintaining an aesthetically pleasing retail environment and completing sales transactions.
2. Ability to work and transact business 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 provide oversight, direction, and support of co-workers in the absence of a supervisor.
4. Ability to communicate orally refers to expressing spoken ideas or facts clearly and logically when answering questions, giving instructions, and providing information.
5. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication, and division with whole numbers, fractions and decimals.
6. 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.
7. 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.

8. 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.
9. Ability to coordinate, open and close, and operate a retail postal unit. This includes planning and organizing the work of a small group of employees to achieve unit goals.
10. 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.
11. Ability to safely perform the duties common to the position.

#### EXAMINATION REQUIREMENTS:

Applicants must successfully complete Postal Service Test 473, which includes the following measures of job-related knowledge, skills, and abilities:

- A. Address Checking
- B. Forms Completion
- C. Coding & Memory
- D. Personal Characteristics and Experience Inventory

#### 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 distribution associate) providing a comprehensive knowledge of postal regulations, rulings, policy, and procedures relating to window work.

#### 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.

#### ADDITIONAL PROVISIONS:

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.

Lead Sales & Services Associates must work their assigned tour and days of work. Lead Sales & Services Associates must follow Postal Service policies and procedures for personal conduct at work, including adhering to rules and regulations.

Lead Sales & Services Associates are required to provide service to the public. They must maintain a neat and professional appearance in such interactions, including wearing a uniform and name tag when required.