

Steps	Actions Needed	Task Owner
	District LR Manager or Designee serves as the Project Compliance Team Lead	Cross Functional District Compliance Team: District Labor Relations/ HR/Finance/ Retail and Delivery Operations
Roll-Out	LR must schedule a meeting with HR, Finance (TACS Coordinator), and Retail and Delivery Management to discuss the contractual provisions to ensure compliance with the Clerk Craft Jobs MOU and the LSSA and Lead Customer Service Clerks and "TACS Duties".	District Labor Relations
Roll-Out	Review the Job Description of the Lead Sales and Service Associate and the Lead Customer Service Clerk and the Lead Clerk Clock Office Role TACS Duties which must be performed by the Lead Clerks. Review the LSSA Participant Training Guide for Cours 1002330 to familiarize the Retail Managers and Supervisors of all the duties which should be performed by LSSAs. Encourage Retail and Delivery Management to utilize the LSSA and Lead Customer Service Clerks optimally to perform all administrative duties as listed in the job descriptions.	District Labor Relations
Roll-Out	If requested, Headquarters Field Labor Relations can present the Continuing Education Session on Lead Clerks and Clock Office Role to the District Compliance Team.	District Labor Relations
1	Run a HCES Report of all Lead Sales and Service Associates, Lead Customer Service Clerks and Lead Mail Processing Clerk Duty Assignments both vacant and filled.	District Human Resources
2	LD & D run a training report of all Lead Sales and Service Associates and Lead Customer Service Clerks to identify those who have been trained on the: - LMS Course #10025624, Lead Clerk Overview Training -Course #31267-01 Time and Attendance Collection System - Supervisor Training	Learning Development and Diversity
3	LD & D run a training report of all Lead Sales and Service Associates to identify those who have received the required training: -Course #10023330 Lead Sales and Services Associate (LSSA)	Learning Development and Diversity
4	Determine if Lead Clerks are performing the "TACS Duties" .	Retail and Delivery Operations
5	Identify duty assignments which may already have "TACS Duties " annotated in the Job Comments of the Duty Assignments.	District Human Resources

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6	Determine if the incumbents of any Duty Assignments identified in Step #4 have been trained (#2) and are performing the "TACS Duties".	Retail Delivery Operations and LDD
7	If no LSSA or Lead Customer Service Clerks duty assignments have "TACS Duties" annotated in the Job Comments of the Duty Assignments, apply Step 8.	Retail and Delivery Operations and HR Local Services
8	HR Local Services must take the necessary actions with HRSSC to officially add <i>"Will Perform TACS Duties – Must complete required TACS training"</i> to the HCES Job Comments on the current LSSA duty assignments that will be performing TACS duties.	HR Local Services
9	Provide the necessary training to all LSSAs and Lead Customer Service Clerks	Retail and Delivery Operations and LDD
10	Retail and Delivery management must determine if Relief LSSA duties could be added to an existing Level 6 SSA or SSDA duty assignment and add the TACS duties added to their duty assignments in order to ensure the work is being performed by the bargaining unit at all times. (See Text Box below)	Retail and Delivery Operations
11	Meet with the Local APWU during the compliance process. The LMOU may require a discussion for any changes made to a duty assignment.	Labor Relations and Retail and Delivery Operations
12	Duty Clarification Letters must be sent to specific Lead Clerks informing them that TACS duties will be added to Bid Comments in HCES with copies to the Local Union. (See Text Box below)	Labor Relations and Retail and Delivery Operations
13	Schedule the Necessary Training. District TACS Coordinator conducts the training for Course #31267-01. Training may be In-Person or Virtual.	L D & D and District Finance (TACS Coordinator)
14	District must establish a Standard Operating Procedure to ensure the training is scheduled as soon as the successful bidder on a Lead Clerk Duty Assignment is identified in a Bid Award Posting.	HR Local Services and Learning Development & Diversity and Finance
	Retail and Delivery Managers may consider changing an existing duty assignment of a level 6 Sales and Service Associate duty assignment and adding following language added to the Duty Assignment: "Relief Lead Sales and Service Associate. Serves as a replacement when the LSSA is off on non-scheduled days and leave."	
	The change to this position is in accordance with ELM 233.3 Criteria for Evaluating Mixed Assignments. Item 233.3b states, "Regularly scheduled on intermittent days in two bargaining unit positions. When a full-time employee is regularly scheduled on intermittent workdays to perform the work of two separate bargaining unit positions in different grades, the employee is placed in the position in which more than 50 percent of the time is spent. If the time is equally divided, the employee is placed in the higher grade position.	
	Therefore, the designated duty assignment will remain a Level 6 SALES, SVCS/DISTRIBUTION ASSOC position.	