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UNITED STATES
POSTAL SERVICE™

TACS
Time and Attendance
Collection System

TACS Time and
Attendance Clerk

Participant's Workbook

Course 31267-03
February 23, 2001

Finance
Payroll

Use of Training Materials

These training course materials are intended for training purposes only. They have been prepared in conformance with existing USPS policies and standards and do not represent the establishment of new regulations or policies.

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TACS TIME & ATTENDANCE CLERK – INTRODUCTION

The TACS Time & Attendance Clerk training program is intended for those employees who have plant- or district-wide timekeeping responsibilities.   Conversion to TACS will change the nature of the work done by craft timekeeping employees. Because TACS provides supervisors with immediate access to employee time records, clock ring correction and other kinds of support required from timekeeping personnel will diminish. The role of timekeepers will change to a more advisory role: they will assist supervisors in complying with timekeeping rules, and will monitor employee clock rings to ensure that all employees are paid accurately, i.e., in accordance with timekeeping rules, and without recourse to payroll adjustments.

TACS TIME AND ATTENDANCE CLERK TRAINING OBJECTIVES

At the conclusion of TACS Time and Attendance Clerk training, participants will be able to:

- Use the Employee Maintenance Module to add and delete employees, create temporary job assignments, and keep employee master files current.
- Use the Badge Maintenance Module to create and assign badge IDs, and Badge reports to track badges.
- Place an employee on hold using the PPWk Holds module.

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EMPLOYEE MAINTENANCE MODULE

We have already reviewed the different tabs in the Employee Maintenance Module in Supervisor training. However, unlike supervisors who have only query access to this module, you will have update access. This module will focus on how to accomplish certain tasks using this module.

THE EMPLOYEE TAB

As you recall from the Supervisor training, when you first enter the Employee Maintenance Module, the Employee Tab screen will appear. An employee ID must be entered before other tabs can be used.

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Users must either click the Find button, hit the "F9" key, or key <Alt> and the letter "F," all of which display a list of employees, or type in the Employee ID, before any access to the other tabs is available.

➢ "Start Pay period" indicates the pay period during which the employee started in the Postal Service.

➢ "Start Date" gives the actual date of hiring, useful for determining seniority.

➢ "Employee Status" indicates if the employee is active, pending, terminated, or deleted.

➢ "LATS Access Level" will indicate the particular user's level of access in LATS.

➢ "Automatic Higher Level Indicator" must be checked for an employee, when his/her base assignment is of the correct D/A Code and LDC, to automatically receive higher level when moving into certain operations.

➢ "Borrowed Employee Indicator" is checked only when the employee is on loan from another performance cluster and is being paid out of the other performance cluster. If this box is erroneously checked for a performance cluster employee, the employee will get LWOP for that period of time.

➢ "Time Collection" indicates whether the employee is in a time clock (EBR) or time card office.

The Borrowed Employee Indicator must be checked whenever an employee is borrowed from **another district** and added to the local TACS instance. **This will allow that employee's time to be tracked only: no check will be generated from the tracking office. Time will have to be reported to employee's office.**

With security permission, the User may access the other screens by clicking a tab. All accessible data displays only one employee ID at a time. If a User has multiple employees to

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change she/he will need to return to the Employee Tab screen for each new employee ID.

JOB ASSIGNMENT/WEEKLY SCHEDULE TAB

Each employee MUST have at least one base job assignment active for any given year, pay period and week, unless the employee's status is "deleted". This screen comes up when the User has clicked on the Job Assignment/Weekly Schedule Tab from the Employee Maintenance module. The Add and Delete buttons are available only when the User has permission for these.

The Employee ID and Name boxes are carried over from the Employee Tab, and the User cannot move into or click on these items.

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Temporary assignments of a week or longer are entered here with a "T" in the "Type of Job Assignment" box. The arrow keys on the keyboard, or the "Diff WK/JA" button will move you from the Base assignment to the Temporary, or between dual assignments. If the job assignment is a Temporary job, it may be deleted. Base and Dual assignments may not be deleted.

When only one week is open, changes made to the Employee Maintenance file will be applied to future weeks. **However, during the time that 2 weeks are open in TACS, changes must be entered and saved in both weeks**. The "Diff WK/JA" button is used to toggle between weeks. This button toggles between open weeks as well as between multiple job assignments (if applicable).

The Weekly Schedule is populated weekly from the download procedure. If the User has made modifications or added new schedules for an employee, the most recent record will be used.

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DAILY SCHEDULES TAB

The Daily Schedules Tab is used to make a temporary change to the employee's scheduled off days and/or scheduled times.

Prior to making changes in this tab, make sure the appropriate week and job assignment is displayed in the YRPPWK and JA fields. When 2 weeks are open, the latest week is automatically displayed. The prior week must be selected from the Job Assign/Weekly tab by toggling between weeks or job assignments as previously explained.

You can change single reporting times in the fields **Begin** and **End** tour and **Lunch** begin time if it changes. "Out of Schedule" can be checked only if an employee schedule is changed by management (Form 1723 is required). Holiday and Sunday premium will automatically be updated when you save the

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changed days off of the employee in a holiday week. Sunday premium is not due if the change in days off was at the request of the employee (via form 3189).

PRIOR ASSIGNMENTS TAB

Any assignments the employee has held over the previous eight pay periods will be listed here.

Unless an employee has had a temporary job assignment (i.e. detail H/L), or has moved into a different position, the job would remain the same each week. "B" in the "Job" column indicates base job and "T" indicates temporary.

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ADD A NEW EMPLOYEE (WAS B1 IN PSDS)

(Use the production database. If not available, use the Training Database.)

1. Open the Employee Maintenance Module, Employee Tab. Press the "Add" button.
2. Key in the new employee's "Employee ID," or social security number. You do not need to use dashes (-) between the numbers of the ID.
3. Press <Enter>, <Tab>, or Click on the "Name" box.
4. Key in the Employee's last name and press <Enter>, <Tab>, or click on the "First Name" box.
5. Key in the Employee's first name and press <Enter>, <Tab> or click on the Middle Initial" box and input the initial.
6. Press <Enter>, <Tab>, or click on "Start Pay Period." Key in the year, pay period and week. Use the four-digit year (i.e., 2000-05-1). **An employee must start in the current week or within one pay period.**
7. Click on the Job Assign/Weekly Tab. The cursor will be located at the "Type of Job Assignment" field. Press either the <F9> key for a list of values, or key in the letter "B" for Base.
8. Press <Enter>, <Tab>, or click in the "Start YrPPWk" field. Press <F9>and select the appropriate start date (i.e, 1999071) and press <Enter> or <Tab>. (O = open F = future)
9. Skip "End YrPPWk" by pressing <Enter> or <Tab>.

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EXERCISE 1

Follow the steps above and add a new employee (Part-time flex). (For Customer Service, use Finance Number 47-4632, LDC 2100, Operation 7220. For Processing & Distribution, use Finance Number 47-4634 LDC 1400, Operation 0300.)

JA=B;   D/A type = 41-0(PDC) or 43-4(CS);
RSC = E;   RSC Suffix = always 0;
Position Level = 05; Step Code = A;
FLSA = N;   Employee Type = Craft;
Fin Unit = 0000;
Pay location = 017(CS), 101(PDC);
LU is 00;   Work Week Type = 5.

Click on "Schedule ID" at the bottom of the screen, and select a schedule (it is set to '0' which is a default schedule). If appropriate, select the rotating week. Enter the employee's begin and end tour times which are by default set to 0800 to 1650. (In production the Daily Schedules may be changed, but even if they are left at the default settings, the employee's clock rings dictate the Casual and PTF employee's schedule).

Note: Scheduled days off and schedule times are allowed by the system even if the employee is a Casual, Part Time Flex (PTF) or Temporary (TE).

Click on the Daily Schedule tab to populate this module with the information entered on the Job Assignment tab.
Click on the Save button, or press <Alt> and the letter <S>, to save the record.

After adding a new employee, a badge is automatically assigned to this employee in the Badge Maintenance Module.

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CHANGE/DELETE AN EXISTING EMPLOYEE

Temporary Schedule Change (Form 3189 should be on file)

1. Call up an employee on the Employee Tab. When the employee is displayed, click on the Daily Schedules Tab.
2. Use your mouse to click on the check mark (indicates non-scheduled days) to make the box blank so you can change days off temporarily. (You can only change open weeks).
3. Click on the day of the week you want the non-scheduled day to be.
4. Click on the "Save" button," or press <Alt> <S> on your keyboard when you are finished.

Note: If two weeks are open you may need to go to the Job Assign/Weekly tab to toggle to the appropriate week prior to making the temporary schedule change.

Change Pay Locations (Was B3 in PSDS)

1. Click on the Job Assign/Weekly Tab.
2. Highlight the Pay location using the mouse and press the <F9> key.
3. Select the new pay location, and Press <Enter>. Then "Save."
4. When you change the pay location in TACS, it will also be changed on the main frame in Minneapolis.

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Delete an Employee (Was B2 in PSDS)

1. Display an employee's record.
2. Click on the "Delete" button to remove this employee record from the file. The "Active" status will change to "Terminated."
OR, Click on the "Status" box, then the <F9> key, to display options and to mark the record as "Deleted" or "Terminated."
3. If left as terminated or deleted, the employee record will be eliminated from TACS at the next weekly close-out.
4. Click on the "Save" button.

Note: The system will default to "Pending" status if the employee has rings for the current week. The status must be changed to "Terminated " or "Deleted" the following week.

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GIVE AN EMPLOYEE A HIGHER LEVEL ASSIGNMENT / LOAN AN EMPLOYEE

1. After displaying the employee on the Employee Tab in the Employee Maintenance Module, click on the Job Assign/Weekly Tab.
2. Click on the "Add" button, or press <Alt> <A> on your keyboard.
3. Key in the letter 'T' for Temporary, or press the <F9> key to list the options and select "Temporary Assignment."
4. Press <Enter> or <Tab> to get to "Start YrPPWk." Press the <F9> key, select a start date (2000-05-1 in training database), and then press <Enter>. **Note: If the YrPPWk is in the future, the system will not automatically fill in the base job information.**
5. From the "Start Date," use <Tab> or <Enter> to move down to "End Date."   Key in the "End Date" and press <Tab> or <Enter>. (An end date is required for a temporary assignment. This end date cannot be longer than one year from the start date.)
6. The information from the base job will be automatically filled in, with the Rate Schedule Code (RSC), PO Level and Work Week fields blank. Change the indicative information according to the temporary assignment (i.e., D/A = 090, RSC = E, RSC Suffix = 0, Level = 16, LDC = 2000, Oper/LU = 7050, Work Week Type = 5.) If you are changing a carrier, be sure the route is blank.
7. If you are loaning an employee to an active Finance number in your TACS instance, you must change the pay location, LDC, and operation number according to the temporary assignment.   If you are loaning an employee to a Finance number not active in your TACS instance, you can only use operation numbers 9880-9970 and the corresponding LDC.
8. Click on the appropriate radio buttons to indicate whether the temporary assignment will entail use of a 1261, will have

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lunch automatically entered, and will be subject to variable EAS conditions.

9. Click on the "Sched ID" field. The schedule will be set to the employee's current schedule. You may change the schedule if the temporary assignment so requires.

10. Save your work.

11. Click on the Daily Schedule Tab (this could be changed but just click on "Save" or <Alt> <S>).

Note: After the temporary assignment is saved, and any time an employee has more than one job assignment, the "Diff Wk/JA" button allows you to toggle from one assignment to another.

EXERCISE 2

Add a week-long higher level assignment to an employee. Use the production database if at all possible, but if you don't have any 1723s, use the training database with the following information.

Customer Service	**PDC**
D/A = 090	D/A = 090
RSC = E	RSC = E
Level = 16	Level = 16
LDC = 2000	LDC = 1000
Oper/Lu = 7050-00	Oper/Lu = 7010-00
Work Week Type = 5	Work Week Type = 5

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EMPLOYEE REPORTS

Some employee reports will be run by timekeepers.

Employee File Comparison Report, lists TACS employees found with differences between what is in the master file in Minneapolis and TACS.

Higher Level Details Report will generate a report listing those employees on long term higher level details.

LTD Duty/REHAB Report displays for each person on limited duty or rehabilitation, total hours to date for each operation. These are persons on Operation 9590, or for whom the base Labor Distribution Code is 6900.

PPWK Status Report will provide information on the number of employee records ready for the weekly close out.

REHAB/PTR Holiday Report will list those employees for which the holiday must be manually entered.

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BADGE MAINTENANCE MODULE

The software in your badge making equipment is able to assign a badge type and sequence number to a particular badge. You are able to assign a Badge ID to an employee. For the most part the Badge ID will match the Employee ID or Social Security Number (SSN). Exceptions may occur when you assign an Authorizing, Dual, Temporary or Vehicle badge to an employee.

Whenever a new employee is added to the Employee Maintenance Module, TACS automatically assigns a badge in the Badge Maintenance Module.

There are six types of badges that can be assigned to an employee. All badge types in existence will be badge type '0' when you start using TACS. When an employee loses a permanent or any other type of badge, you should assign the next number in sequence to the replacement badge ID. This will identify the badge to the TACS system and if the employee uses a badge that does not have the correct sequence number that you assigned, you will see an error in the Clock Ring error report. This will help prevent employees from using more than one badge.

Type 1: Permanent Regular Badge
Type 2: Permanent Authorizing Badge
Type 3: Permanent Dual Badge
Type 4: Temporary Employee Badge
Type 5: Temporary Authorizing Badge
Type 9: Vehicle Badge

The Badge Maintenance screen is displayed upon entering the Badge Maintenance module. When a badge ID is entered, the employee file or table will be searched for a matching SSN and if found, the SSN will be inserted into the Employee ID field and the employee Last Name, First Name, and Middle Initial will be

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displayed on the Assign Tab. If a match is not found, or a duplicate badge ID is found, these fields will not be filled in. The Badge Description Field will be filled in with a Vehicle Description if this is a Vehicle Badge. The Finance Number and Local Unit fields will be filled in with information from the employee if the Employee ID was found in the employee table.

ASSIGN TAB

The Assign Tab is used to assign badges to employees. An employee should generally have only one badge assigned to them at any given time. An exception to this rule would be temporary authorizing badges that are needed for 204-B employees (acting supervisors). Generally, only a few people within the office will be responsible for creating, maintaining and assigning badges to the employees.

HISTORY TAB

The History Tab provides information on the types and number of badges used by an employee over the years.

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CREATE A BADGE

1. Go to the Badge Maintenance Module under the Employee menu.
2. Enter the employee ID into the "Employee ID" field.
3. Click on "Add." The cursor will move to the "Badge Type" field.
4. Enter a badge type, (you can use <F9> or "Find"), press <Enter> or <Tab>. The "Badge Description" and "Sequence Number" will fill in automatically. You will need to enter a finance number. Comments are optional.
5. Click on "Save," and then on the Assign tab.
6. Press the "Assign" button on the Assign tab.

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BADGE REPORTS

The Badge Reports Module allows you to create and run 3 reports.

The **Badge Assignment Report** shows for all badges, or a particular type of badge, which are currently active or which were active for a given time frame.

The **Unassigned Badges Report** shows badges that were assigned but have been deactivated either currently or for a particular time frame.

The **Badge Type Listing Report** lists the 6 different types of badges.

There is an additional report that is critical in badge control, for it will identify rings that have not processed because of a badge problem.

 Raw Ring Report (Clock Ring Reports Module)

This is a valuable report that will help you identify why some rings have not been processed by TACS. For example, look for error codes 098 and 105. The clock rings for these employees will reappear in the Clock Ring Editor after you correct these badge maintenance problems.
Let's look at some of the error codes in the Raw Ring report.

CODE 098
Indicates an invalid employee badge ID. It is most likely caused by an employee using a badge that has not been assigned to an employee in badge maintenance at all, or by an employee using a new badge while the old badge assignment is still in effect. (For example, using a badge with 01 sequence while 00 sequence is still active.) If the condition is corrected, the rings

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should automatically post to the clock ring table. If rings have been entered via the Clock Ring Editor before the correction is made, the correction could cause duplicate rings in the clock ring table.

CODE 105
A ring came in from the EBR with an invalid Authorizer badge ID. Correct the same as error 098.

CODE 106
Rings from the EBR came in with an expired badge ID. The employee should use the new badge and the old badge should be taken out of circulation. Corrections will have to be made via the Clock Ring Editor until the correct badge is used.

CODE 107
A ring came in from the EBR with an invalid finance number or operation number. Likely causes might be a mismatch of EBR and TACS finance number or operation numbers. Depending on the cause, the rings might post when the situation is corrected or they might have to be entered via the Clock Ring Editor.

CODE 108
There is a problem with the job assignment for the employee badge ID. Perhaps there is no job assignment, or the ring is for a week without a job assignment.

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PPWK HOLDS MODULE

The PPWk Holds module is used for keeping an employee's time record locked so it does not get pulled up to the Minneapolis mainframe during the first few passes. Whether you release the hold or not, the record will be pulled into Minneapolis directly prior to the 6:00 PM local time close-out on Mondays. If the employee's time is in error, the system will generate either LWOP or non-scheduled time for the time missing.

You would use this module, for example, when an employee turned in a 3971 for sick leave and, after looking in the employee file, you saw the employee did not have enough leave. If you could not get in touch with the employee immediately to discuss his or her options, then you might want to lock the record until it can be determined which course to take.

In the PPWk Holds Module, Year-PP-Wk tabs at the top of the screen reflect the pay period and week, either past or present. Make certain you choose the current one.

The "Hold Indicator" indicates whether or not the employee's weekly time will be held until the final release on Monday. You may key in the Employee ID or click on the "Find" button to select the employee you want to hold. Once the employee's name appears next to the "Employee ID" box, click on the box next to the "Hold Indicator" (Checked equals Yes, unchecked equals No).

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After filling in the information regarding the Hold Indicator, you have the option to key in a Hold Comment, which can be used to describe why this employee is in 'Hold' status. Be sure to click on the Save button or press <Alt> S on your keyboard.

"Crossfoot Amt" displays the number of hours that have been calculated up to this point in time for the current week.

"TA Entry Code" tells whether the employee's time is entered via timecards or automatically calculated from clock rings.

"Release date" provides a time-stamp of when this employee's time was released to Minneapolis for mainframe processing. If the employee record is ready to go on Friday evening, this box will reflect that date. If the employee's record is not ready but is in the last run on Monday, then the date will reflect Monday.

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The "Status Code" will be set to either an 'I,' an 'R' or a 'C.' An 'I' indicates 'Incomplete,' which means the employee's record is not ready to be pulled into Minneapolis. The 'R' indicates 'Ready,' which means the employee's record will be uploaded Friday evening or the next pass. The 'C' indicates 'Closed,' which means the record cannot be held or changed and has been or will be uploaded to Minneapolis shortly.

"Days worked" indicates the number of days this employee has worked in the current week, based on the number of hours processed and other calculations.

"Last day worked" reflects the T&A day that this employee last worked in the current week. This number will be selected from one (1) through seven (7).

PLACE AN EMPLOYEE ON HOLD

1. Find an employee.
2. Click on the "Hold Indicator" box.
3. Key in a description of why the employee is on hold.
4. Click on "Save."

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PPWK REPORTS

The **Non-Crossfoot Errors Report** lists employees who do not crossfoot for the week. This report is designed to be a tool at the end of the week, and it is recommended that it not be used until you are ready to release T&A data.

The **Pay Week Status Report** provides information regarding time transmitted to Minneapolis.

The **Weekly Form 1261 Report** provides employee clock rings in 1261 format.

The **Weekly Total Hours Report** provides the total amount of hours of each hours code and reason type recorded for the week.

The **Pay Period Report** provides the status of aggregate pay period clock ring data.

The **Pay Week Status Detail Report** provides pay period status for individual employees: on hold, ready to upload, or closed.

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CLOSE-OUT TACS

The TACS system will close weekly, just like all of the Postal timekeeping systems. Here are the time frames:

Week 1 - A batch program will run that will create the hours totals and the LTATS entries for the week. The file will be captured by Minneapolis on Monday, Week 2, Day 3 of the pay period, at 1800 hours local time. One pass only.

Week 2 - A batch program will run that will create the hours totals and the LTATS entries for the week. This program will run several times starting on Friday, Week 2, day 7, at 1800 hours local time. There will be multiple passes:

Week 2 Day 7 - At 1800 hours local time;
Week 1 Day 01 – At 1800 hours;
Week 1 Day 02 – At 1800 hours;
Week 1 Day 03 - This will be the 'final' close-out; at 1800 local time.

The close-out will take place automatically. The system will pull all employees at the final close out for both weeks whether the clock rings are corrected or not (or if an employee is still in a 'Hold' status).

Note: PTFs, TEs, Casuals, and PTRs will not be pulled on Fridays. Supervisors will be pulled on Fridays. Supervisors for whom the Variable EAS indicator is checked in the Job Assignment Tab of the Employee Maintenance Module will be held until Monday.

Even though the transmission of rings to Minneapolis is an automated process, there are important local activities that need

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to be performed just prior to that transmission. It is very important that all employees crossfoot before their rings are transmitted, and it is the responsibility of the data site to monitor employee clock rings and ensure that all employees do crossfoot. If an employee is out of crossfoot when the week is closed, it is likely that a payroll adjustment will be required.

Four reports need to be used at the end of the week to ensure that all employees crossfoot: the Clock Ring Error Report, Missing Time Report, Employees Out of Crossfoot Report, and Pay Week Status Detail Report.

- **Clock Ring Errors Report** will display errors on a clock ring or set of clock rings that can not be posted for an employee..
- **Missing Time Report** will show employees who do not have time posted for a scheduled day or who do not crossfoot on any day.
- **Non-Crossfoot Errors Report** lists employees who do not crossfoot for the week. This report is designed to be a tool at the end of the week, and it is recommended that it not be used until you are ready to release T&A data.

- **Pay Week Status Detail Report** provides pay period status for individual employees: on hold, ready to upload, or closed.