

# **Module 1A**

## **eRMS Messages**

**December 2004**

## Module 1A: eRMS Messages

References	Instructional Aids	Handouts	Overheads	Videos
<ul style="list-style-type: none"><li>• ELM</li><li>• <a href="http://rmdweb">http://rmdweb</a></li></ul>	<ul style="list-style-type: none"><li>• LCD Projector</li><li>• Overhead Projector</li><li>• Web Access</li></ul>	<ul style="list-style-type: none"><li>• None</li></ul>	<ul style="list-style-type: none"><li>• Module Objectives</li><li>• Key Points</li></ul>	<ul style="list-style-type: none"><li>• None</li></ul>

Time Allocated For Unit: 20 Minutes

## Module 1A: eRMS Messages

### Objectives:

At the completion of Module 1A, the participant will:

- Become familiar with the new Microsoft Outlook eMail messaging with regard to your employees' unscheduled absence requests and leave entries via IVR, Call Center "Leave Request Application" and eRMS
- Have an operating knowledge of the new eRMS Message Inbox function (Leave Request)

### Time Allocated for Module:

- 20 Minutes

### Instructional Methods:

- Classroom/Computer Lab

### Media Required:

- LCD Projector, Overhead Projector

### For Further Information

- Refer to the eRMS User's Guide

## Release 3.6 -- Summary of Changes

### IVR Sites Only:

- Supervisors will now receive an immediate Microsoft Outlook eMail notification of all leave requests. All leave entries, which have requested a confirmation number input into eRMS, will also receive a Microsoft Outlook eMail notification.
- The Leave Request generated by the IVR/Call Center "Leave Request Application" System will also generate an eRMS message to the Supervisor. The Supervisor will then have the option to approve, deny or remove the Leave Request.
- Approving the Leave Request will automatically update the employee's leave record and transfer that leave entry to TACS, eliminating the need for the Supervisor to enter it into TACS.
- Denying the Leave Request
  - Denied leave will be reflected on the eRMS 410 screen, "Employee Management – Leave Entry", and will populate the PS3971. It does **NOT** affect TACS.
  - If needed, a new leave entry would have to be created, using the ACS role to create the new entry.
- The Call Center handling of leave requests now mirrors the IVR request process. Call Center agents no longer use eRMS for "leave requests". Call agents now use our new "Leave Request Application" (LRA) and will not have access to eRMS.
- ACSs who enter leave and are not the pay location supervisor MUST enter "YES" to "do you want a confirmation #" so that leave does not go to TACS until the supervisor approves it. Pay location Supervisors can go into the ACS role and say "no" to the confirmation number and it will go directly to TACS.
- All IVR activated sites will be linked to TACS.
- eRMS leave will transfer to TACS "**time clock**" offices ONLY when your site has been IVR activated.
- Leave must be entered into TACS for "**time card**" offices even after your site is IVR activated.

### Non-IVR Sites Only:

- The Leave Entry generated by the Attendance Control Supervisor will not generate an eRMS Message. However, an immediate Microsoft Outlook eMail notification will be sent to those who have requested a confirmation number.
- Non-IVR Sites will **Not** be linked to TACS until the site has been IVR activated. All leave entries into eRMS must be entered manually into TACS.

### IVR and Non-IVR Sites: "Deems Desirable" Function

- The Supervisor will be able to place employees in a "Deems Desirable" status, thus requiring documentation for any unscheduled absences during a specified timeframe. Only the supervisor role can place employees in this status.

**LEAVE REQUEST**

Sample of a Microsoft Outlook Leave Request e-mail generated by the IVR/ Call Center "Leave Request Application" process. This will also generate an eRMS Message that will need to be responded to in order to update the employee's leave record and populate TACS automatically. The call center handling of leave requests now mirrors the IVR request process.

From: eRMS-NOTIFICATION@usps.gov [mailto: eRMS-NOTIFICATION@usps.gov]  
Sent: Tuesday, March 02, 2004 8:53 AM  
To: Supervisor Name  
Subject: ACTION REQUIRED

LEAVE REQUEST FOR Employee Name FROM 02-MAR-04 TO 02-MAR-04

This is an auto-generated e-mail. Do not reply to this e-mail. If you have any questions, contact your manager.

**LEAVE ENTRY**

Sample of a Microsoft Outlook Leave Entry e-mail generated by the Attendance Control Supervisor. This will NOT generate an eRMS message. TACS will NOT be automatically updated; therefore, supervisors MUST enter this leave entry into TACS.

From: eRMS-NOTIFICATION@usps.gov [mailto: eRMS-NOTIFICATION@usps.gov]  
Sent: Tuesday, March 02, 2004 8:36 AM  
To: Supervisor Name  
Subject: ACTION REQUIRED

LEAVE ENTERED FOR Employee Name FROM 02-MAR-04 TO 02-MAR-04

This is an auto-generated e-mail. Do not reply to this e-mail. If you have any questions, contact your manager.

## The eRMS Message Inbox (IVR Sites Only)

### Login as Supervisor:

The eRMS Message Inbox is the heart of the messaging system. All current, unanswered or undeleted messages within eRMS, whether User-to-User or System-Generated, will appear in the Inbox upon a successful login.

**NOTE:** On initial login to retrieve messages from the Main Menu screen, you may need to select the "Message" button.

### Supervisor Response to Leave Request

When a leave request is entered by an employee using the IVR/ Call Center "Leave Request Application" system, the responsible Supervisor(s) will receive a Leave Request Message, as given below. To respond, click the "Respond" Button. You will be taken to the Employee Management Screen with a Leave Request Overlay. You will have 3 options: "Approve" the Leave, "Deny" the Leave or "Remove" the Leave. You will also have the option of reviewing the employee's record prior to responding to the request if you wish. The first Supervisor to respond to the message will remove the message from all other responsible Supervisors' Inboxes.

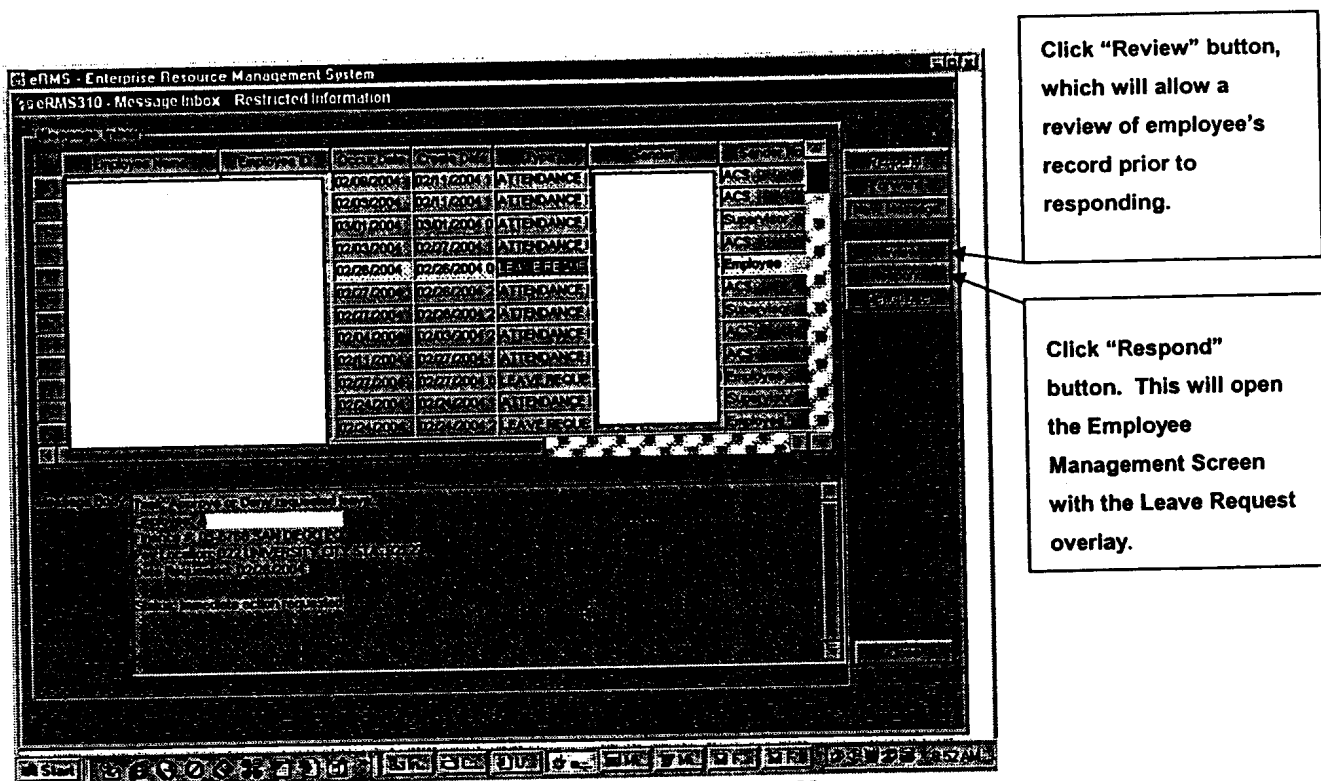


Figure 1A-1: Message Inbox with Leave Request Message

- [illegible]

**IMPORTANT:** The results of the above steps will update the 3971, 3972, Employee Key Indicator Report and all other relevant reports within eRMS. eRMS will also populate TACS based on the leave request approval. Please ensure that all entries are correct and accurate as they affect pay and leave balances.

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## Denying the Leave Request

1. Click "Deny" Leave within the Leave Request Overlay. This will open the "Deny Leave" screen.
2. Enter the reason for denying the leave in the "Note" screen, as shown below.
3. Click "Save".
4. Click "OK" to Save Successful Message. You will now be prompted to print the 3971.
5. Click "Yes" to this prompt and print the 3971 for the employee to sign upon his/her return. The calendar will then reflect the denied leave appropriately.

eRMS - Enterprise Resource Management System

tpaRMS420 - Deny Leave - Restricted Information

EMPLOYEE INFORMATION

EMPLOYEE ID: 19-4018 HERLER, KS

EMPLOYEE NAME: SEUSS, THEODORE G

EMPLOYEE POSITION: 000 DEFAULT

LEAVE TYPE: 125-00 ANNUAL LEAVE REGULAR

FROM: 05/02/2003

TO: 05/02/2003

REASON FOR DENIAL: 05/02/2003

NOTE

Type reason for denying Leave Request here.

Buttons: Save, Undo Denial, Print

**Figure 1A-3: Deny Leave Screen**

**NOTE:** If needed, a new leave entry would have to be created, using the ACS role.



## Approving the Leave Request

1. Click "Approve" Leave within the Leave Request overlay.
2. Click "Save".
3. Click "OK" to Save Successful Message. You will now be prompted to print the 3971.
4. Click "Yes" to this prompt and print the 3971 for the employee to sign upon his/her return. The calendar will reflect the approved leave for date(s) requested, and update all reports and balances.
5. This action will also automatically transfer the leave to TACS, eliminating the need for the Supervisor to enter it manually.

The screenshot shows the eRMS interface with the 'Approve Leave Request' overlay. The top section displays employee information: Employee ID 11111111, Name HEPLER, JOSE, and Department 000 DEFAULT. Below this is a calendar view for April and May 2003, showing days of the week and dates. The bottom section contains a table of leave balances and requests.

Leave Type	Balance	Request Date	Request Amount	Request Status
ANNUAL LEAVE - REGULAR	160.00	05/02/2003	00.00	00.00
SICK LEAVE - REGULAR	160.00	05/02/2003	00.00	00.00
COMPENSATION TIME	160.00	05/02/2003	00.00	00.00
PTO - REGULAR	160.00	05/02/2003	00.00	00.00
PTO - VACATION	160.00	05/02/2003	00.00	00.00
PTO - SICK	160.00	05/02/2003	00.00	00.00
PTO - JURY	160.00	05/02/2003	00.00	00.00
PTO - MATERNITY	160.00	05/02/2003	00.00	00.00
PTO - FATHERLY	160.00	05/02/2003	00.00	00.00
PTO - PARENTAL	160.00	05/02/2003	00.00	00.00
PTO - JURY	160.00	05/02/2003	00.00	00.00
PTO - MATERNITY	160.00	05/02/2003	00.00	00.00
PTO - FATHERLY	160.00	05/02/2003	00.00	00.00
PTO - PARENTAL	160.00	05/02/2003	00.00	00.00

Figure 1A-2: 410 Screen with Approve Leave Request Overlay

**IMPORTANT:** The results of the above steps will update the 3971, 3972, Employee Key Indicator Report and all other relevant reports within eRMS. eRMS will also populate TACS based on the leave request approval. Please ensure that all entries are correct and accurate as they affect pay and leave balances.

**Example;** You approve 1 hour late and the person comes in only 30 minutes late. The Supervisor would only annotate the 3971 and TACS will automatically be adjusted when the employee clocks in. However, the eRMS leave entry will need to be edited to ensure accuracy of 3972s. You will need to, after approving the late request, go in as your ACS role and edit the approved leave request.

## Denying the Leave Request

1. Click "Deny" Leave within the Leave Request Overlay. This will open the "Deny Leave" screen.
2. Enter the reason for denying the leave in the "Note" screen, as shown below.
3. Click "Save".
4. Click "OK" to Save Successful Message. You will now be prompted to print the 3971.
5. Click "Yes" to this prompt and print the 3971 for the employee to sign upon his/her return. The calendar will then reflect the denied leave appropriately.

eRMS - Enterprise Resource Management System

eRMS420 - Deny Leave - Restricted Information

EMPLOYEE ID: 10515117

EMPLOYEE NAME: SEUSS, THEODORE G

EMPLOYEE ADDRESS: 19-4016 HERLERS

EMPLOYEE CITY: 000 DEFAULT

NOTE

Type reason for denying Leave Request here.

Save Cancel Undo Denial

**Figure 1A-3: Deny Leave Screen**

**NOTE:** If needed, a new leave entry would have to be created, using the ACS role.

## Removing the Leave Request

1. Click "Remove" Leave within the Leave Request Overlay.
2. Click "Save". This will clear the employee's request for leave.

### Cautionary Note: "Remove Leave" Button

This will remove the entire record of leave recorded for that request from eRMS. But you will create unnecessary work for yourself if you remove a leave request unless it is a duplicate request.

This should only be used for duplicate entries. There are actually 3 ways to deal with a duplicate request.

#### Example:

An employee calls and requests EAL on the IVR, then calls back and requests LWOP for the same number of hours. Only one of the entries can be approved by the Supervisor. Let's assume you plan to approve the LWOP since it was the last request received. The following are 3 options to handle this situation, in order of preference:

1. "Deny" the EAL and "Approve" the LWOP  
There will be a denied leave record for the EAL, and the reason would be that "the employee requested another leave type for this absence".
2. "Ignore" the EAL and "Approve" the LWOP  
If you do not act on the EAL, it would result in a message to the next level manager. However, you can explain that you did not act on the leave request because it was a duplicate request.
3. "Remove" the EAL, and "Approve" the LWOP  
When you "Remove" the EAL and "Approve" the LWOP, you will not have a record in eRMS of the EAL leave request.

Do not "Remove" leave using this button for any reason other than duplicate leave request. "Approve" and "Deny" leave buttons should handle all other requests.

**Note:** First, review the employee's record before you respond. Go to the "Employee Management" screen where you can review the employee's record, including any Administrative Actions, Supervisor Comments or any other part of their record. You can also view the 3971 for any comments using the "Emp Reports" button on screen 410. To return to the Message Inbox, click "Close" on the "Employee Management" screen.

# **Module 1B**

## **Employee Management**

**December 2004**

## Removing the Leave Request

1. Click "Remove" Leave within the Leave Request Overlay.
2. Click "Save". This will clear the employee's request for leave.

### Cautionary Note: "Remove Leave" Button

This will remove the entire record of leave recorded for that request from eRMS. But you will create unnecessary work for yourself if you remove a leave request unless it is a duplicate request.

This should only be used for duplicate entries. There are actually 3 ways to deal with a duplicate request.

#### Example:

An employee calls and requests EAL on the IVR, then calls back and requests LWOP for the same number of hours. Only one of the entries can be approved by the Supervisor. Let's assume you plan to approve the LWOP since it was the last request received. The following are 3 options to handle this situation, in order of preference:

1. "Deny" the EAL and "Approve" the LWOP  
There will be a denied leave record for the EAL, and the reason would be that "the employee requested another leave type for this absence".
2. "Ignore" the EAL and "Approve" the LWOP  
If you do not act on the EAL, it would result in a message to the next level manager. However, you can explain that you did not act on the leave request because it was a duplicate request.
3. "Remove" the EAL, and "Approve" the LWOP  
When you "Remove" the EAL and "Approve" the LWOP, you will not have a record in eRMS of the EAL leave request.

Do not "Remove" leave using this button for any reason other than duplicate leave request. "Approve" and "Deny" leave buttons should handle all other requests.

**Note:** First, review the employee's record before you respond. Go to the "Employee Management" screen where you can review the employee's record, including any Administrative Actions, Supervisor Comments or any other part of their record. You can also view the 3971 for any comments using the "Emp Reports" button on screen 410. To return to the Message Inbox, click "Close" on the "Employee Management" screen.

## Module 1B: Employee Management

References	Instructional Aids	Handouts	Overheads	Videos
<ul style="list-style-type: none"><li>• ELM</li><li>• <a href="http://rmdweb">http://rmdweb</a></li></ul>	<ul style="list-style-type: none"><li>• LCD Projector</li><li>• Overhead Projector</li><li>• Web Access</li></ul>	<ul style="list-style-type: none"><li>• None</li></ul>	<ul style="list-style-type: none"><li>• Module Objectives</li><li>• Key Points</li></ul>	<ul style="list-style-type: none"><li>• None</li></ul>

Time Allocated For Unit: 15 Minutes

## Module 1B: Employee Management

### Objective:

At the completion of Module 1B, the participant will:

- Have a working knowledge of the Employee Management – “Deems Desirable” Functionality

### Time Allocated for Module:

- 15 Minutes

### Instructional Methods:

- Classroom/Computer Lab

### Media Required:

- LCD Projector, Overhead Projector

### For Further Information

- Refer to eRMS User's Guide

## **Module 1B - Employee Management**

### **Overview**

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The eRMS 410, "Employee Management-Leave Entry" screen is the launching point for any function performed within eRMS.

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The "Deems Desirable" function is located on "Employee Administration" screen, eRMS260. This is a select/deselect check box that allows the supervisor to require documentation when the employee calls in during the specified timeframe set by the supervisor. When you select the box, the "Deems Desirable" display on "Employee Management" screen eRMS410 will display the date range entered.

If an employee calls in and you have activated this function to indicate that documentation is "deemed desirable" for the protection of the Postal Service, the IVR System, Call Agent or Attendance Control Supervisor will inform the employee that he/she is required to provide documentation for any leave request on the specified dates indicated.

\* Note: Only the supervisor role can activate the "Deems Desirable" function.



## Module 1B: Employee Management

"Deems Desirable" Function – allows the supervisor to require documentation from the employee any time the employee calls in during the specified date range. The Supervisor should also indicate the reason for requiring documentation.

### *Accessing the Actions*

1. Activate eRMS and Log In..
2. From the Main Menu, click "Employee Management".
3. **Find** and **Select** an employee. This will return you to the "Employee Management– Leave Entry" screen with the information of the selected employee.

Use this option...	Where to find/Purpose...
"Edit Emp"	The screen opens up to Employee Administration eRMS260 screen.  This screen is where you'll find the "Deems Desirable" select/deselect checkbox.
"Deems Desirable"	Use this option to place a "Deems Desirable" status on the employee to indicate that documentation is required for unscheduled leave requests for a specified timeframe.
"Supervisor Cmts"	To record reason for placing employee in "Deems Desirable" status.

***Table 1B-1: Employee Management – Action Options***



## Overview of the Employee Management “Deems Desirable” Functionality

### How to Use the “Deems Desirable” Functionality

In accordance with the ELM 513.361, the Supervisor is able to indicate when documentation is required for an unscheduled leave request because it is deemed desirable for the protection of the Postal Service.

1. Find and select an employee.
2. Click the “Edit Emp” button on the lower right side of the eRMS410 screen.
3. You will be sent to the “Employee Administration” eRMS260 screen. Where it says “Deems Desirable” in the middle of the screen, click the box beside “Documentation Required”. This will activate the “Date From” and “Date Through” boxes, allowing the Supervisor to make date entries.
4. Type a date range in the from/through boxes (date range must be current date or later).
5. Click “Save”. Click “OK” to “Save” Successful Message. Click “Close”.

### To Add Comments to Why the Documentation is Required:

6. Click “Supv Cmts” button.
7. Click “Add”.
8. Type “Deems Desirable” in “Title” block.
9. Change the “N” under Share to “Y” so that others can see why you placed the employee in the “Deems Desirable” status.
10. Enter comments as needed for placing the employee in the “Deems Desirable” status.
11. Click “Save”. Click “OK” to “Save” Successful Message. Click “Close”.

**NOTES:**

Emphasize that the Supervisors comments must remain professional when entered and must abide by proper business rules.

Numerous disputes have arisen over situations in which a Supervisor has required an employee not in the restricted sick leave status to provide medical documentation for an illness of three days or less. Generally, to challenge such a decision successfully the union should demonstrate that the Supervisor acted arbitrarily, capriciously or unreasonably in requiring the employee to obtain medical documentation. The union should be prepared to show that the grievant has a good overall sick leave record or no record of support. Management should be prepared to articulate the reason for requiring documentation, based on the employee's pattern of absences, or the circumstances surrounding the absence that caused management to suspect abuse.

Supervisors should seek and follow advice from Labor Relations regarding acceptable reasons for requiring documentation in accordance with ELM 513.361.

The screenshot shows the 'eRMS260 - Employee Administration Restricted Information' window. It contains several input fields and checkboxes. A white arrow points to the 'Restricted Information' checkbox, which is checked. The 'Start Date' and 'End Date' fields both show '03/17/2004'. The bottom of the window has a standard Windows taskbar with icons for Start, Run, and other applications.

**Figure 1 B-2 – Employee Administration Screen eRMS260**

**Figure 1B-3 - Employee Management Screen eRMS410 with Deems Desirable Information**

eRMS - Enterprise Resource Management System

eRMS515 - Supervisor Comments Restricted Information

Employee Information

Employee ID: [Redacted] Employee Name: [Redacted]

Supervisor Comments

Seq	Date/Time	Title	Show	Author	Supervisor	Date/Time
1	03/02/2004	Deems Desirable	Y	XJOVB0	Supervisor	03/02/2004 09:36:03
2						
3						
4						
5						
6						
7						

Per ELM 513.361.  
In conjunction with a reoccurring event

2/20/2004 9:38 AM

**Figure 1B-4: Supervisor Comments Window**

Note: To add comments per items #6 through 10, here is where the Supervisor would indicate the reason for "Deems Desirable" documentation request. Please keep your comments short and professional. Refer to the ELM 513.361, as needed for using "Deems Desirable".