



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

3.30.127

DECEMBER 22, 2025

EFFECTIVE DATE

(12-22-2025)

PURPOSE

- (1) This transmits revised IRM 3.30.127, Work Planning and Control - Workload Scheduling.

MATERIAL CHANGES

- (1) Throughout IRM 3.30.127 - Changed references from Suite of Tools for the Review and Creation of Automated Workplans and Schedules (STRAWS) to ServiceNow Automated Work Plans and Schedules (SNAPS).
- (2) IRM 3.30.127.1.4 - Added to describe how the program is measured and evaluated.
- (3) IRM 3.30.127.1.5 - Added to describe the mechanisms used to oversee the program.
- (4) IRM 3.30.127.1.6 - Updated Acronyms Table
- (5) IRM 3.30.127.1.7 Note - Updated information about OFP SharePoint
- (6) IRM 3.30.127.4(5) - Updated to reflect SNAPS stages
- (7) IRM 3.30.127.4(5) Note - Updated to reflect information of files created from SNAPS
- (8) IRM 3.30.127.5 - Added Workload to Title
- (9) IRM 3.30.127.5(1) Note - Updated to reflect SNAPS titles
- (10) IRM 3.30.127.5.3(3) - Added Assumptions to list
- (11) IRM 3.30.127.5.3(5) - Updated Module functions
- (12) IRM 3.30.127.6(4) - Updated Business Unit Codes table
- (13) IRM 3.30.127.7 - Updated to describe SNAPS Access and User Roles
- (14) IRM 3.30.127.7.1 - Added to provide instruction for requesting SNAPS access
- (15) IRM 3.30.127.7.2 - Added to describe SNAPS User Roles
- (16) IRM 3.30.127.8 - Updated to describe SNAPS Administration Duties
- (17) IRM 3.30.127.9 - Updated to describe the Work Plan Projections Module
- (18) IRM 3.30.127.9.1 - Updated to provide instruction for the Work Plan Projections Data Setup
- (19) IRM 3.30.127.10 - Updated to describe the Work Schedule Updates Module
- (20) IRM 3.30.127.10.1 - Updated to provide instruction for the Work Schedule Updates Data Setup from Work Plan Projections
- (21) IRM 3.30.127.11 - Updated to describe the Work Schedule Spreads Module
- (22) IRM 3.30.127.11.1 - Updated to provide instruction for the Work Schedule Spreads Data Setup from Work Schedule Updates

- (23) IRM 3.30.127.12 - Updated to provide instruction for importing text files to SNAPS
- (24) IRM 3.30.127.12.1 - Updated to provide instruction for the text file layout to import files to WPP and/or WSU
- (25) IRM 3.30.127.12.2 - Updated to provide instruction for the text file layout to import files to WSS
- (26) IRM 3.30.127.14 - Added to provide instruction for initializing a scheduling period and generating prior year history
- (27) IRM 3.30.127.15 - Added to provide instruction for Work Planning and Control
- (28) IRM 3.30.127.15.1 - Added to provide instruction for Workload Scheduling Runs
- (29) IRM 3.30.127.15.2 - Added to provide instruction for Weekly Workload and Staff Hour Schedule
- (30) IRM 3.30.127.15.3 - Added to provide instruction for Daily Workload and Staff Hour Schedule
- (31) IRM 3.30.127.15.4 - Added to describe the Workload Schedule Review

EFFECT ON OTHER DOCUMENTS

IRM 3.30.127, Work Planning and Control - Workload Scheduling, dated July 16, 2024, is superseded.

AUDIENCE

All organizations within the IRS that develop work plans and work schedules.

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Taxpayer Services

3.30.127

Workload Scheduling

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3.30.127.1
(09-30-2025)
Program Scope and Objectives

- (1) **Purpose:** This IRM describes the operations necessary to develop workload plans and schedules using the ServiceNow Automated Work Plans and Schedules (SNAPS).
- (2) **Audience:** All organizations within IRS that develop work plans and work schedules.
- (3) **Policy Owner:** Director Submission Processing (SP), Taxpayer Services.
- (4) **Program Owner:** Taxpayer Services, Customer Account Services (CAS), Submission Processing, Program Management/Process Assistance (PM/PA) Branch, Resource Section.
- (5) **Primary Stakeholders:** All users who develop work plans and work schedules.

3.30.127.1.1
(09-30-2025)
Background

- (1) ServiceNow Automated Work Plans and Schedules (SNAPS) replaced Suite of Tools for the Review and Creation of Automated Workplans and Schedules (STRAWS) as the tool in preparing work plans. SNAPS is built upon a cloud-based enterprise platform called IRWorks that became effective for all organizational use on November 22, 2024. The STRAWS application was retired and decommissioned from further use in July of 2025.

3.30.127.1.2
(04-01-2018)
Authority

- (1) Management within each campus environment must communicate security standards contained in IRM 1.4.6, Managers Security Handbook, to employees and establish methods to enforce them. Employees must take required precautions to provide security for the documents, information, and property they handle while performing official duties.

3.30.127.1.3
(09-30-2025)
Responsibilities

- (1) The Program Management/Process Assistance (PM/PA) Branch, Resource Section, Program Analyst manages IRM 3.30.127 and keeps current information for the operations necessary to develop workload plans and schedules using SNAPS.
- (2) Each Headquarters office sets up their organizations work plan data. In addition, each Headquarters office establishes their organization cut-off dates per the business owner's (Submission Processing) final transmission dates.
- (3) Submission Processing is the business owner of SNAPS. However, each Business Unit's Headquarters Office will assign, for their organization, one Campus Administrator for each center and a backup, if necessary.
- (4) Campus Administrator will perform the campus level administrative requirements of SNAPS.

3.30.127.1.4
(12-22-2025)
Program Management and Review

- (1) **Program Reports:** The reports mentioned in this IRM are used to create the weekly and daily workload management reports.
- (2) **Program Effectiveness:** The program effectiveness is determined by comparing the scheduled data for each function and program to the actual data for each organization within the campuses.

3.30.127.1.5
(12-22-2025)
Program Controls

- (1) Each campus must have at least one SNAPS Power User and one Editor for each Organization.

- (2) Campus Power Users are responsible for reviewing all the scheduling performed within their campus to ensure it is completed in a timely manner.
- (3) Campus Editors are responsible for scheduling all production and/or hours within their organization to align with the data provided by prior year actual production and/or hours worked or by special scheduling methods provided by headquarters in a timely manner.
- (4) Headquarters Administrators are responsible for establishing and revoking user access to SNAPS.
- (5) Headquarters Administrators are responsible for ensuring all scheduling is complete prior to exporting to EFTU.

3.30.127.1.6
(09-30-2025)
Acronyms

- (1) The table lists commonly used acronyms and their definitions.

Acronym	Definition
AM	Accounts Management
BMF	Business Master File
BU	Business Unit
CAS	Customer Account Services
CFO	Chief Financial Officer
CI	Criminal Investigation
CCA	Campus Compliance Services
ECC-DET	Enterprise Computing - Detroit
ECC-MEM	Enterprise Computing Center - Memphis
ECC-MTB	Enterprise Computing Center - Martinsburg
FMSS	Facilities Management and Security Services
FDA	Forecasting and Data Analysis
IMF	Individual Master File
IT	Information Technology
JOC	Joint Operations Center
NSA	National Standard Application
OFP	Organization, Function, and Program
PAC	Program Activity Code
PCB	Workload Scheduling
PIMS	Pipeline Inventory Monitoring System

Acronym	Definition
PM/PA	Program Management/Process Assistance
SBSE	Small Business Self-Employed
SNAPS	ServiceNow Automated Work Plans and Schedules
SP	Submission Processing
STRAWS	Suite of Tools for the Review and Creation of Automated Workplans and Schedules
TAS	Taxpayer Advocate Service
TS	Taxpayer Services
WP&C	Work Planning and Control
WPP	Work Plan Projection
WSS	Work Schedule Spread
WSU	Work Schedule Update

3.30.127.1.7
(09-30-2025)

Related Resources

- (1) SNAPS is described in IRM 3.30.19, Work Planning and Control, Production Control and Performance Reporting.
- (2) Instructions for developing data for the system hinge upon the use of unique numeric or alphanumeric codes for each Organization, Function, and Program (OFP). For more information on authorized OFP codes, check the *OFP SharePoint Home Page*.

Note: The OFP SharePoint Home Page is currently not available to submit new OFPs or make any changes to existing OFPs. Please contact the *OFP Coordinator*

3.30.127.2
(09-30-2025)

Workload Scheduling Overview

- (1) This IRM describes the operations necessary to develop workload plans and schedules using SNAPS.
- (2) SNAPS is described in IRM 3.30.19, Work Planning and Control, Production Control and Performance Reporting.
- (3) Instructions for developing data for the system hinge upon the use of unique numeric or alphanumeric codes for each OFP. For more information on authorized OFP Codes, please check the *OFP SharePoint Home Page*.

Note: If the OFP Home Page link is not working, contact the OFP administrator.

3.30.127.3
(07-16-2024)
IRM Deviations

- (1) IRM deviations must be submitted in writing following instructions from IRM 1.11.2.2.3, Internal Management Documents System - Internal Revenue Manual (IRM) Process. When Procedures Deviate from the IRM and elevated through proper channels for executive approval.

3.30.127.4
(09-30-2025)
Work Plans

- (1) Congress approves the Financial Plan with which the IRS operates. Accordingly, business operating divisions and remote sites develop a resource plan through their respective headquarters organization. This work plan identifies the amount of work to be performed in each planning period for each program. It incorporates those factors that will influence the amount of work to be accomplished at the individual campuses and remote sites in an upcoming fiscal year.
- (2) The work plan process originates within each respective business operating division's headquarters or Joint Operations Center (JOC) resource planning entity. SNAPS is the planning tool currently being used by all organizations in the IRS that develop work plans. The business owner of SNAPS is Taxpayer Services, Customer Account Services, Submission Processing, Program Management/Process Assurance Branch, Resource Section, C:DC:TS-CAS:SP:PM:R.
- (3) IRWorks is a ServiceNow cloud-based Enterprise Service Management platform that is transforming the IRS IT infrastructure, streamlining and automating routine workflows, centralizing data sources, and uniting business functions across the IRS.
- (4) ServiceNow Automated Work Plan and Schedules (SNAPS) is a part of the growing IRWorks ServiceNow platform. SNAPS is a reliable, modern resource projection tool that reduces reliance on manual processes.
- (5) The development of the work plan is a process through four (4) key stages. This allows SNAPS users from both Headquarter and Campus levels to manage and track each record's development from setup through final approval. These stages are as follows:
 1. **Initial** - Includes loading the Prior Year History, Work Plan data, projections provided by RAAS (Research, Applied Analytics, and Statistics) and/or any new planning assumptions.
 2. **Negotiation** - Used by headquarters and sites to propose changes to the Initial volumes, rates and hours provided by HQ in the Initial Stage.
 3. **Review** - Headquarters and field organizations conduct a work plan review conference to work out any differences. It is at this point where the outstanding issues are either agreed or disagreed.
 4. **Final** - After the conclusion of the work plan review conferences, all OFPs are copied and stored. This stage of the work plan is generally used as the basis for benchmarking resources for the upcoming year.

Note: The Work Plan Projection (WPP) in SNAPS will create a Work Plan file (DCC.TXT), which is converted to a PCB 0128, Schedule Master File, and used in the mainframe PCB runs to print the daily (PCB-04-40) and weekly (PCB-05-40) workload schedules. See IRM 3.30.127.12, Exporting Data from SNAPS for OPIS.

3.30.127.5
(09-30-2025)
**Workload Scheduling
System**

- (1) The Workload Scheduling System has three interrelated components:
 - a. A monitoring component, which analyzes Work Planning and Control (WP&C) data
 - b. A cumulative history component, which produces a history of all weekly WP&C data for previous reporting periods; and
 - c. A scheduling component, which produces the work schedules

Note: The scheduling component is the Work Schedule Spread module in SNAPS.

3.30.127.5.1
(02-01-2003)
Monitoring Component

- (1) The monitoring component consists of computer runs which:
 - a. Analyze each OFP's cumulative WP&C data; and
 - b. Produce the summary reports.

3.30.127.5.2
(02-01-2011)
**Cumulative History
Component**

- (1) A weekly OFP History Report (Project Literal for Campus Workload Scheduling, Project PCB (562) (PCB-03-40)) provides a summary of the previous reporting period's WP&C data. The report may be generated and used as a planning tool for scheduling purposes. The OFP History Report data is generated by the Headquarters Submission Processing Resource Section who initialize the reporting period data by requesting a PCB 00Q Initialization run from the Enterprise Computing Center-Martinsburg (ECC-MTB)/Enterprise Computing Center-Memphis (ECC-MEM) scheduler and a PCB 03H History Dump. The Headquarters Submission Processing Resource Section must request these runs within thirty days after the previous reporting period has concluded. See IRM 3.30.127.14 , Initializing a Scheduling Period and Generating Prior Year History.

3.30.127.5.3
(09-30-2025)
Scheduling Component

- (1) SNAPS replaced STRAWS as the tool in preparing work schedules. The work schedule is developed by using both the Work Schedule Update (WSU) and Work Schedule Spread (WSS) Modules in SNAPS. These modules are used by various organizations within the IRS that report to the WP&C.
- (2) The work plan provides the total volume, rates, and staff hours by OFP Code and reporting period. The work schedule allows schedule workload and resources on a weekly or daily basis within each period. Thus, developing a unique work schedule for each of the three reporting periods of the year. These Work Schedule periods are as follows:
 - a. For planning period one, encompassing the first quarter of the fiscal year (October-December).
 - b. For planning period two, encompassing the second and third quarters of the fiscal year (January-June).
 - c. For planning period three, encompassing the fourth quarter of the fiscal year (July-September).
- (3) The first step in the development of a work schedule is to identify any prior year reports or new information that relate to the new scheduling period. While the type of information available might vary, the following is a list of the most used reports.
 - **OFP History (PCB03-40)** - This report provides the prior year's comparable period weekly/daily data concerning the activity (OFP) to schedule for the same period.

- **WP&C Performance and Cost Report (Manager's Report) (PCC60-40)** - The Manager's Report is designed to be a tool for evaluating current actual performance against work schedule as well as receipt patterns, production rates, and inventories.
 - **WP&C Program Analysis Report (PCC62-40)** - Like the Manager's Report, it is designed to be a tool for evaluating current actual performance against work schedule as well as receipt patterns, production rates and inventories. This report allows review of OFPs that have volume only or OFPs that have less than 0.5 hours, which do not appear on the Manager's Report.
 - **Final Work Plan** - The Final Work Plan provides the baseline planning data work schedules. This includes systemic, procedural and legislative changes that were addressed in the work plan.
 - **Assumptions** - More program guidance received from each individual Business Unit's Headquarter Office of any known changes to a specific program. This request is issued in memorandum form twice a year. Once during the Work Plan process in the October-December period and again during the January-June Work Schedule process.
- (4) Consideration of changes planned for the current work schedule period that are different from the same period last year is a commonsense approach to developing a good work schedule. Some of the examples of known changes are as follows:
- Reorganizations
 - OFP Changes
 - New Programs
 - Special Projects
 - Inventory Levels
 - Tax Law Changes
 - IRM Procedural Changes
- (5) SNAPS currently consists of four modules that will assist the Work Schedule developer. These modules are as follows:
- **Administrative Module** - There are several tables and function limited to the SNAPS Admin team. This menu allows data to be loaded and exported, set parameters and control user access. Those functions under the Administrative Menu are:
 - Business Unit/Office/Organization/Function/Program (BOOFP)
 - Calendar Generator
 - Import Data
 - Export Data for OPIS
 - User Access
 - **Work Plan Projection (WPP) Module** - Provides an early, high-level view of projected volume and hours for all OFPs across all three planning periods (October-December (P1), January-June (P2), and July-September (P4)). The data serves as a foundation for creating financial statements and developing early-season hiring plans for filing.
 - **Work Schedule Updates (WSU) Module** - Used to update quarterly needs with any new information that has emerged since the Initial Work Plan. The work schedule process begins with data from the Work Plan

as a baseline. During this process, campuses also complete detailed weekly and daily schedules for each OFP that has planned production activities or hours.

- **Work Schedule Spreads (WSS) Module** - Used to develop a more detailed weekly and/or daily work schedule for each individual planning period. The data generated in the Work Schedule Spreads Module is exported out and used in developing the PCC-60-40 WP&C Managers Report. This report tracks actual data as it compares to the schedule.
- (6) The Work Schedule Update (WSU) module in SNAPS is used to schedule only the totals for each period at the parent OFP level. When the WSU module is setup, these totals are loaded to the Work Schedule Spreads (WSS) module. The totals can then be spread out on a weekly and/or daily basis at the fifth digit level if applicable.
 - (7) The Work Schedule Spread module in SNAPS will create a Work Schedule file (PCB 0128.OUT), which is converted to a PCB 0128 Schedule Master File and used in the mainframe PCB runs to print the daily (PCB-04-40) and weekly (PCB-05-40) workload schedules.
 - (8) The PCB 0128 Schedule Master File is used to generate the Schedule Review Report (PCB-85-40), which is a comparative report of Work Plan, Work Schedule, and Prior Year Actual data. It is sometimes referred to as the Three-Way Comparison Report.
 - (9) Date records (e.g., PCB 0121 Scheduling Date Master, PCB 0122 and PCB 0124 Schedule Conversion Record) are input by Information Technology (IT) Schedulers. A ticket is initiated to ECC-MTB or ECC-MEM via email from Headquarters Submission Processing Resource Section.

3.30.127.6
(09-30-2025)
Definitions and Codes

- (1) Listed below are definitions:
 - **Julian Date** - Unless otherwise noted, this date is expressed as a three-digit number, which indicates the sequential day of the year.
 - **ECC-MTB Enterprise Computing Center** - Martinsburg (ECC-MTB) provides Tier 1 computer level service to five of the ten campus locations - Andover, Austin, Brookhaven, Ogden, and Philadelphia.
 - **ECC-MEM Enterprise Computing Center** - Memphis (ECC-MEM) provides Tier 1 computer level services to five of the ten campus locations - Atlanta, Cincinnati, Fresno, Kansas City, and Memphis.
 - **OFP** - An abbreviation for Organization, Function, and Program codes, which can be numeric or alphanumeric codes used in combination to identify work processes. For more information on valid organization, function and program combinations, please visit the *OFP SharePoint Home Page*.
 - **Performance and Cost (P&C)** - Data that measures campus production by OFP, as described in IRM 3.30.19, Work Planning and Control, Production Control and Performance Reporting.
 - **Schedule Master File (PCB 0128)** - The Schedule Master File is created after the data in STRAWS is validated and an exportable PCB 0128.OUT file is saved. This file is used to create the Schedule Master File (PCB 0128) to produce the various work schedule output reports and is incorporated into the WP&C system. It provides the baseline against which OFPs are monitored.

- **SNAPS** - This cloud-based application is used for development of Work Plans and Work Schedules. It replaces STRAWS.
- (2) Listed below are new SNAPS terminology that will be used to ensure consistency of terms as they relate to OFP calculations and report outputs:

Term	Definition
Direct Hours	All OFPs except for Function 880 and 990
Overhead Hours	All Function 990
Other Direct	Direct less the Quality Excluded. Used to calculate the hours for a Quality OFP based on the percent to the Direct Hours.
Overhead Direct	Direct plus Quality less the overhead excluded. Used to calculate the hours for an Overhead OFP based on the percent to the Direct Hours
Overhead Excluded	Total hours for OFPs identified as excluded from Overhead Calculations
Total Direct	Direct plus Quality - excluding all Function 990 (Overhead Hours)
Quality	All Function 880 programs
Quality Excluded	Total hours for OFPs identified as excluded from Quality calculations

- (3) Listed below are codes:

- **Organization Code** - A unique five-character numeric or alphanumeric code identifying a campus organization level. All scheduling documents require only the entry of the first two characters, Operations (Submission Processing (SP) and Compliance (CS)) or Department (Accounts Management (AM)).
- **Function Code** - A three-digit number identifying a work action or group of actions.
- **Program Code** - A five-digit number identifying a return or document being processed.
- **Process Code or OFP Type** - An indicator that tells how the OFP is being processed. The following are a list of the Process Codes:

Process Code	OFP Type
H	Hours Only
V	Hours with Standard
P	Production Only
S	Production with Standard
O	Overhead Calculated
Q	Quality Calculated

- (4) Listed below are the available assigned Business Unit Codes in SNAPS. Contact the Business Unit's Headquarters Office to determine the assigned business code.

Bus Unit Code	Description	Orgs
AMBMF	Taxpayer Services Accounts Management Business Master-file (BMF) Centers	AW, AY, AZ, B1, B9
AMBREM	Taxpayer Services Accounts management BMF Acct. Remote	E1, E9
AMIREM	Taxpayer Services Accounts Management IMF Acct. Remote	D1, D9
AMITLREM	Taxpayer Services Accounts Management IMF Tax Law Remote	D1, D9, E1, E9
EPSS	Electronic Products & Services Support	1C
IDTVA	Taxpayer Services IDT/Victim Assistance	IY, IZ, I1, I3
SP	Taxpayer Services Submission Processing	12, 20, 23, 24, 31, 32, 34, 35, 36, 37, 38, 43

3.30.127.7
(09-30-2025)
SNAPS Access and User Roles

- (1) This section provides the definition for each entitlement to help each user determine what entitlement to request as well as the instructions on how to request access to SNAPS.

3.30.127.7.1
(09-30-2025)
Requesting SNAPS Access

- (1) Users request access to SNAPS (ServiceNow Automated Work Plans and Schedules) through the Business Entitlement Access System (BEARS).
- Access *BEARS* and click the bear's head logo to log in.
 - After logging in, click Manage my Access on the BEARS Home screen.
 - At the Manage My Access screen, search for one of the following BEARS entitlements and select the correct application based on the data in the table below and click Next:

SNAPS BEARS Entitlement	Accesses
PROD MGR SERVICENOW SNAPS BUSINESS OWNER MANAGER (IRWORKS)	Top-level system administrator limited to a small number of users in the PMPA Resources Staff.
PROD OPER SERVICENOW SNAPS HQ POWER OPERATOR (IRWORKS)	HQ user with limited administrative access to provide support for BUs outside of SP.
PROD USER SERVICENOW SNAPS HQ EDITOR USER (IRWORKS)	HQ user with access to update work plan/schedule data during the negotiation process.

SNAPS BEARS Entitlement	Accesses
PROD USER SERVICENOW SNAPS HQ USER (IRWORKS)	HQ user with read only access needed to review work plan/schedule data and generate reports.
PROD OPER SERVICENOW SNAPS CAMPUS POWER OPERATOR (IRWORKS)	Campus user with limited administrative access to provide support for offices in the field.
PROD USER SERVICENOW SNAPS CAMPUS EDITOR USER (IRWORKS)	Campus user with access to update work plan/schedule data during the negotiation process.
PROD USER SERVICENOW SNAPS CAMPUS REVIEWER USER (IRWORKS)	Campus user with read only access needed to review work plan/schedule data and generate reports.

- (2) At the Review and Submit screen, click the Submit button.
- (3) When prompted to provide more information, click Complete Form.
- (4) At the Complete Work Item box, input special instructions indicating Business Unit, Office and Org(s) to which access is needed. Alternately, you may provide the name and SEID of a user who has the same access that you require. Then click OK.
- (5) Read the confirmation note as well as the terms and conditions, then click Accept.
- (6) The request will be processed and approved or denied by your manager and then by a member of the approval team in PMPA Resources.

3.30.127.7.2
(09-30-2025)

SNAPS User Roles

- (1) Listed below are the available assigned User Roles in SNAPS.
 - SNAPS leverages user roles to allow access to functionality within the application including administrative activities, data setup, input of work plan and work schedule data, and creation of reports. Below are the user roles that exist within SNAPS and their corresponding permissions and BEARS entitlements.
 - a. **Admin User Role** - Activity is permitted in all Business Units, Offices and Organizations.

User Group	User Permissions
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SNAPS Admin • BEARS Entitlement: PROD MGR SERVICE- CENOW SNAPS BUSINESS OWNER MANAGER	<ul style="list-style-type: none"> • Create and assign new users to specific Business Unit, Offices, and Organizations • Edit and inactivate OFP (Organization-Function-Program) records • Manage OFPs excluded from systemic calculations • Generate and manage the Calendar Generator including setting up fiscal year data • Upload files to import data to WPP (Work Plan Projections), WSU (Work Schedule Updates), and Work Schedule Spreads (WSS) • Export data from WPP and WSS for use in the WP&C (Work Planning & Control) run streams • Manage data setup for WPP and WSU • Update, deactivate, and approve records in WPP, WSU, and WSS in the Initial, Negotiation and Review stages • Adjust historical data for each OFP by week • Access SNAPS standardized reports and create personalized reports
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- b. **HQ User Roles** - Activity is restricted to the user's assigned Business Units, Offices and Organizations.

User Group	User Permissions
HQ Power User • BEARS Entitlement: PROD OPER SERVICE- CENOW SNAPS HQ POWER OPERATOR	<ul style="list-style-type: none"> • Edit and inactivate OFP (Organization-Function-Program) records • Manage OFPs excluded from systemic calculations • Upload files to import data for WPP (Work Plan Projections), WSU (Work Schedule Updates) and WSS (Work Schedule Spreads) • Manage data setup for WPP and WSU • Update, deactivate, and approve Projection records in WPP, WSU and WSS in the Initial, Negotiation and Review stages • Adjust historical data for each OFP by week • Access SNAPS standardized reports and create personalized reports

User Group	User Permissions
HQ Editor • BEARS Entitlement: PROD USER SERVICE NOW SNAPS HQ EDITOR USER	<ul style="list-style-type: none"> • Upload files to import data to WPP (Work Plan Projections), WSU (Work Schedule Updates) and WSS (Work Schedule Spreads) • Update and approve Projection records in WPP, WSU and WSS in the Negotiation and Review stages. • Adjust historical data for each OFP by week • Access SNAPS standardized reports and create personalized reports
HQ Reviewer • BEARS Entitlement: PROD USER SERVICE NOW SNAPS HQ REVIEWER USER	<ul style="list-style-type: none"> • Read records in WPP, WSU and WSS in the Negotiation and Review stages • Access SNAPS standardized reports and create personalized reports

- c. **Campus User Roles** - Activity is restricted to user's assigned Business Unit, Office and Organization.

User Group	User Permissions
Campus Power User • BEARS Entitlement: PROD OPER SERVICE NOW SNAPS CAMPUS POWER OPERATOR USER	<ul style="list-style-type: none"> • Upload files to import data to WPP (Work Plan Projections), WSU (Work Schedule Updates) and WSS (Work Schedule Spreads) • Update, deactivate and approve Proposal records in WPP, WSU and WSS in the Negotiation stage • Adjust historical data for each OFP by week • Access SNAPS standardized reports and create personalized reports
Campus Editor • BEARS Entitlement: PROD USER SERVICE NOW SNAPS CAMPUS EDITOR USER	<ul style="list-style-type: none"> • Update and approve Proposal records in WPP, WSU and WSS in the Negotiation stage • Adjust historical data for each OFP by week • Access SNAPS standardized reports and create personalized reports
Campus Reviewer • BEARS Entitlement: PROD USER SERVICE NOW SNAPS CAMPUS REVIEWER USER	<ul style="list-style-type: none"> • Read records in WPP, WSU and WSS • Access SNAPS standardized reports and create personalized reports

3.30.127.8
(09-30-2025)
SNAPS Administrative Duties

- (1) Submission Processing is the business owner of SNAPS. However, each Business Unit's Headquarters Office will assign, for their organization, on Campus Power User for each center and a backup, if necessary, to perform the campus level administrative requirements of SNAPS. Each Headquarters office must also do the following:

- Approve all SNAPS requests via the Business Entitlement Access Request System (BEARS) for their organization
- Establish cut-off dates and locks for their organization
- Importing data to setup Work Plan Projections and Work Schedule Update modules for their organization
- Add, delete and lock OFPs
- Define percentages to direct for related Quality and Overhead programs for their organization
- Define thresholds for requiring narratives and tolerance levels for the hours variance between Work Schedule Updates and Work Schedule Spreads for their organization
- Validate the accuracy of their organizations data prior to final transmissions

3.30.127.9
(09-30-2025)
**SNAPS - Work Plan
Projection Module**

- (1) The work plan is developed to project the staffing needs for each office for the fiscal year. The work plan is developed in phases allowing input from both Headquarters and the Field Offices. All three periods are planned along with the total for the fiscal year. The work plan normally begins in late June and is completed in late August each year. It is used as the basis for the development of the work schedules.
- (2) The Work Plan Projections (WPP) table is a list of WPP records and is visible in the list view.
- (3) Open a record by selecting the Record Number from the list.
- (4) The WPP record will have three sections:

First Section	Includes the Number, Stage, Program Type, PAC, Fiscal Year, OFP, HQ Agrees check box and Campus Agrees check box as well as the Projection and Proposed sections for each Period.
Second Section	Includes the Initials Tab and the Activities Tab. <ul style="list-style-type: none"> • Initial Tab - This tab shows the initial values for Production, Standard and Hours for Periods 1, 2 and 4. • Activities Tab - A log of activities, updates and communications related to WPP.
Third Section	Includes any Related Links and/or Related Lists. <ul style="list-style-type: none"> • Related Link - are quick-access links that are displayed at the bottom of a record that will direct the user to related records or more information. • Reference Data - Provides a detailed view of associated records that serve as supporting data for the current records, offering more context or relevant information from other sources with the system.

- (5) All valid SNAPS user will have access to the Work Plan Projection Module screens and their user permissions will determine the level of access they are

granted. However, only SNAPS Administrators, HQ Power Users and Campus Power Users can import and/or export, load and/or copy data with the Work Plan Module.

3.30.127.9.1
(05-09-2022)

**Work Plan Projection
Data (WPP) Setup**

- (1) Only the SNAPS Administrators and HQ Power Users will have access to complete the data setup process.
- (2) Each Business Unit office must set up their organizations work plan data. In addition, each Business Unit office must establish their organization cut-off dates per the business owner's (Submission Processing) final transmission dates.
- (3) The process of data setup is used to select specific data as a starting point to begin the Work Plan process. Normally, that data would be Prior Year Actual data.
- (4) The following steps will help the user to select and move data to Work Plan Projection:
 - a. Navigate to the OFPs table
 - b. Select the proper parent OFPs by selecting the check boxes to the left of the records that show (empty) in the Parent OFP column or by filtering the list down to Parent OFPs only by hovering over an (empty) in the Parent OFP column, right clicking and selecting "Show Matching".
 - c. Select the **WPP Data Setup** button in the upper right corner.
 - d. The Work Plan Data Setup window will open. The Fiscal Year of the Work Plan Projection that is being setup must be selected. Select what prior Fiscal Year (FY) and type of data you want the setup to pull from (Prior Year Actual or Prior Year Projection Data) for all three periods.
 - e. Click Proceed
 - f. The SNAPS Process Log window will open with the status of the Data Setup
 - g. Once completed, the status will automatically update to Complete, and a Record List will populate.

3.30.127.10
(09-30-2025)

**Work Schedule Update
(WSU) Module**

- (1) The Work Schedule Update (WSU) is developed for each individual planning period. The work plan and any other recent data is used to develop a summary schedule for each OFP. Only totals for the period are scheduled currently. The process is worked simultaneously with the sites using the Proposal and Projection method.
- (2) The Work Schedule Update is used as the basis for the Work Schedule Spreads (WSS).
- (3) All valid SNAPS users will have access to the Work Schedule Update Module screens and their user permissions will determine the level of access they are granted. However, only Headquarters Administrators, Headquarters Power Users and Campus Power Users can import and/or export, load and/or copy data within the Work Schedule Update Module.

3.30.127.10.1
(09-30-2025)

Work Schedule Update (WSU) Data Setup from Work Plan Projection (WPP)

- (1) Only the SNAPS Administrators and HQ Power Users will have access to complete the data setup process.
- (2) Each Business Unit must set up their organizations work schedule data. In addition, each Business Unit must establish their organization cut-off dates per the business owner final transmission dates.
- (3) The process of data setup is used to update quarterly needs with new information that has emerged since the Initial Work Plan.
- (4) The Work Schedule process begins with data from the Work Plan as the baseline.
- (5) During this process, campuses also complete detailed weekly and daily schedules for each OFP that has planned production or assigned hours.
- (6) The following steps will help the user to select and move data from Work Plan Projection:
 - a. Navigate to the WPP table in SNAPS
 - b. Select the proper records by selecting the check boxes to the left of the records or by filtering the list down to the proper records.
 - c. Select the **WSU Data Setup** button in the upper right corner.
 - d. The SNAPS Process Log window will open with the status of the data setup

Note: During the WSU Data Setup, the application will also be setting up the WSS records in preparation of spreading the production and/or hours to the OFPS related to the Parent OFP.

- e. Once completed, the status will automatically update to Complete, and a Record List will populate.

3.30.127.11
(09-30-2025)

Work Schedule Spreads (WSS) Module

- (1) SNAPS Editors, Power Users and SNAPS Admins can use the Mass Spread feature within the WSU module to efficiently update and adjust multiple WSS records simultaneously.
- (2) The Work Schedule Spreads (WSS) Module is used to develop a more detailed weekly and/or daily work schedule for each individual planning period.
- (3) The data generated in the WSS Module is exported out and converted to a PCB 0128 Schedule Master File which is used in the mainframe PCB runs to print daily and weekly workload management reports. These reports help each campus in comparing, tracking, projecting and negotiating their resource usage.

3.30.127.11.1
(09-30-2025)

Work Schedule Spreads (WSS) Data Setup from Work Schedule Update (WSU)

- (1) The Work Schedule Spread process begins with data from the Work Schedule Update Module as the baseline.
- (2) During this process, campuses also complete detailed weekly and daily schedules for each OFP that has scheduled production and/or hours.
- (3) The following steps will help the user to select and move data to Work Schedule Spreads:
 - a. Navigate to the WSU Module in SNAPS

- b. Select the proper records by selecting the check boxes to the left of the records.
- c. Select the **Actions on Selected Rows** drop-down and select **Mass Spread** from the menu options.
- d. The **Mass Update Spreads** window will open. Complete each drop-down field to determine how the production, hours and weekly standard are to be spread (evenly, actual or projections).
- e. Select if the production and/or hours will be spread to the zero child only or to all child OFPs. Click OK.
- f. Once completed, the status will automatically update to “Complete”, and a Record List will populate.

3.30.127.12
(05-15-2023)

Importing Data via Text File to SNAPS

- (1) Importing Data from a CSV file allows an approved user to upload multiple rows of data at one time.
- (2) Only SNAPS Administrators and HQ Power Users can import data in CSV format to be loaded to Work Plan Projections (WPP), Work Schedule Updates (WSU), or Work Schedule Spreads (WSS) modules.
- (3) Before importing a text file to load into one of the SNAPS modules, the user must first format the data to be compatible with the SNAPS application:
 - a. Through the IRWorks All Menu, type “Service Catalog” in the filter box and locate “Service Catalog” in the “Self-Service” section.
 - b. On the Service Catalog screen, access the “SNAPS-Import Data” function by typing “SNAPS” in the Search Catalog box at the upper right corner.
 - c. On the SNAPS-Import Data screen, select the module to which the data will be loaded, input a note describing the data being uploaded and click the “Click to Add” link to select the CSV file to be uploaded.
 - d. The request will move through Authorization and Fulfillment stages to Closed Complete or Closed Incomplete.

Note: If the request is Closed Incomplete, a list of rows with errors will be displayed. If the request is Closed Complete, a message stating “Closed Complete” will be displayed.

 - e. Check any rows with errors in the original upload file to determine the problem and submit another request with the corrections made as necessary.

3.30.127.12.1
(09-30-2025)

Work Plan Projection (WPP)/Work Schedule Update (WSU) Import Text File Layout

- (1) Only SNAPS Administrators and HQ Power Users can import data in CSV format to the Work Plan Projection (WPP) and the Work Schedule Update (WSU) modules.
- (2) Before importing the text files to load into either of these modules, user must first format the data to be compatible with the SNAPS application.
- (3) Import files for WPP and WSU must be in a CSV (comma separate values) format that is compatible with Microsoft Excel and must have a specific column and data layout as follows:
 - a. Each row (record) of data represents a single BOOFP with the data to be scheduled.
 - b. All headers (Field Name) must be there and spelled exactly as shown.

Note: Use the chart shown in paragraph (6) below to properly lay out the file in Excel.

- (4) The cell format for all fields other than fields 8 through 10 should be text so the leading zeros are not lost. User will need to select the data and change the format to text by selecting Format - Format Cells from the Quick Access Tool bar in Excel or right clicking on the affected cells and selecting Format Cells. Select the Number tab and change the Category to Text before selecting OK.
- (5) Other than Standard, all other fields from 8 through 10 should be set as numbers with decimals and no commas.

Note: For those OFPs with production that won't need a daily spread, put the weekly production in **both** the Friday and Production fields.

- (6) Use the following chart to properly lay out the file in Excel:

Field #	Field Name	Length (Maximum)	Description
1	Business Unit	8	Business Unit Code (SP, EPSS, AMIMF, etc.)
2	Office	4	Campus Acronym (AUSC, KCSC, OSC, etc.)
3	Organization	2	2-digit Organization Code
4	Function	3	3-digit Function Code
5	Program	5	5-digit Program Code
6	PAC	2	2-character Program Activity Code of the data in record
7	Program Type	1	Program Type (P, H, S, V, O or Q)
8	Production	9	Production (Volume)
9	Standard	7	Weekly Standard (Rate) (Decimal allowed, e.g. 152.4)
10	Hours	9	Total Weekly Hours
11	Period	2	Reporting Period (P1, P2 or P4)
12	Fiscal Year	4	Fiscal Year (letters "FY" followed by last two digits of Fiscal Year)
13	Load Fields	10	Stage data should be loaded to (Initial, Projection, Proposal)

- (7) The field lengths for the “Production”, “Standard”, and “Hours” fields listed above are maximums. User will only need to put the actual numbers in these cells; leading zeros will not be necessary because these fields will be separated by commas when the file is converted.
- (8) Please note the following before converting your file to the correct file format to avoid potential errors:
 - Make sure that the daily totals combined equal the weekly production exactly.
Note: Numbers should be whole numbers so there are not rounding errors.
 - Each field (1 through 13) must be entered in a separate column and each record in a separate row.
 - Ensure all data is on one tab/sheet and all other remaining tabs/sheets deleted.
- (9) Once all the above steps have been taken, the file can now be saved as a comma-delimited file format by doing the following:
 - a. Choose file, Save As.
 - b. Change the File Type to .csv (comma delimited).
Note: There are several .csv file types. Select the file type that says “CSV (Comma delimited)(*.csv)”.
 - c. An alert will pop up asking about the file format chosen. If all precautions listed above were followed prior to converting, click YES.
 - d. Close the file.
 - e. Verify that the data saved correctly by retrieving the file through Note Pad.
 - f. When the file is retrieved via Note Pad, the file should contain a comma between each required field in the table above. SNAPS looks at the commas to determine which field each piece of data is copied to rather than the total number of characters.
 - g. The Office and Program numbers should display any leading zeros. The production and standard fields for programs that are Hours Only will all have a zero.
 - h. After verification, close the file.

3.30.127.12.2
(09-30-2025)

Work Schedule Spreads (WSS) Import Text File Layout

- (1) Only SNAPS Administrators, HQ Power Users and Campus Power Users can import data in CSV format to the Work Schedule Spreads (WSS) module.
- (2) Before importing a text file to load into WSS, user must first format the data to be compatible with the SNAPS application.
- (3) Import files for WSS must be in a CSV (comma separate values) format that is compatible with Microsoft Excel and must have a specific column and data layout as follows:
 - a. Each row (record) of data represents a single week ending of data for a BOOFP with the data to be scheduled.
 - b. All headers (Field Name) must be there and spelled exactly as shown.**Note:** Use the chart shown in paragraph (6) below to properly lay out the file in Excel.

- (4) The cell format for all fields other than fields 9 through 16 should be text so the leading zeros are not lost. User will need to select the data and change the format to text by selecting Format from the menu or by right clicking on the affected cells and select Format Cells. Select the Number tab and change the Category to Text before selecting OK.
- (5) Other than Standard, all other fields from 8 through 10 should be set as numbers with no decimals and no commas.

Note: For those OFPs with production that won't need a daily spread, put the weekly production in **both** the Friday and Production fields.

- (6) Use the following chart to properly lay out the file in Excel:

Field	Field Name	Length (Maximum)	Description
1	Business Unit	8	Business Unit Code (SP, EPSS, AMIMF, etc.)
2	Office	4	Campus Acronym (AUSC, KCSC, OSC, etc.)
3	Organization	2	2-digit Organization Code
4	Function	3	3-digit Function Code
5	Program	5	5-digit Program Code
6	PAC	2	2-character Program Activity Code of the data in record
7	Program Type	1	Program Type (P, H, S, V, O or Q)
8	Week #	2	Period Week Number
9	Monday	9	Daily Production
10	Tuesday	9	Daily Production
11	Wednesday	9	Daily Production
12	Thursday	9	Daily Production
13	Friday	9	Daily Production
14	Production	9	Total Weekly Production
15	Standard	7	Weekly Standard (Rate) (Decimal allowed, e.g. 152.4)
16	Hours	9	Total Weekly Hours
17	Reporting Period	2	Reporting Period (P1, P2 or P4)

Field	Field Name	Length (Maximum)	Description
18	Fiscal Year	4	Fiscal Year (letters "FY" followed by last 2-digits of Fiscal Year)

- (7) The field lengths for the "Production", "Standard", and "Hours" fields listed above are maximums. User will only need to put the actual numbers in these cells; leading zeros will not be necessary because these fields will be separated by commas when the file is converted.
- (8) Please note the following before converting your file to the correct file format to avoid potential errors:
- Make sure that the daily totals combined equal the weekly production exactly.
Note: Numbers should be whole numbers so there are not rounding errors.
 - Each field (1 through 13) must be entered in a separate column and each record in a separate row.
 - Ensure all data is on one tab/sheet and all other remaining tabs/sheets deleted.
- (9) Once all the above steps have been taken, the file can now be saved as a comma-delimited file format by doing the following:
- a. Choose File, Save As.
 - b. Change the File Type to .csv (comma delimited)
Note: There are several .csv file types. Select the file that only says "CSV (Comma delimited) (*.csv)".
 - c. An alert will pop up asking about the file format chosen. If all precautions listed above were followed prior to converting, click YES.
 - d. Close the file.
 - e. Verify that the data saved correctly by retrieving the file through Note Pad.
 - f. When the file is retrieved via Note Pad, the file should contain a comma between each required field in the table above. SNAPS looks at the comma to determine which field each piece of data is copied to rather than the total number of characters. The Office and Program numbers should display any leading zeros. The production and standard fields for programs that are Hours Only will have a zero.
 - g. After verification, close the file.

3.30.127.13
(09-30-2025)
**Exporting Data from
SNAPS for OPIS**

- (1) Only SNAPS Administrators can export data in a flat file format to be loaded to OPIS for PCX run stream processing through IRWorks. The flat file is created from the Work Plan Projections (WPP) module.
- (2) To begin this process, the SNAPS Admin will complete the following steps:
- Submitting Export Request
 - Approving Export Request
- (3) To submit the Export Request, do the following:

- a. Through the IRWorks **All Menu**, type “Service Catalog” in the filter box and locate the “Service Catalog” item in the “Self-Service” section.
 - b. On the Service Catalog screen, access the “SNAPS-Export Data” from the results list.
 - c. On the SNAPS-Export Data screen, select the module and input the Fiscal Year from which the data will be exported.
 - d. Clicking the “Order Now” button will submit the request for approval and redirect user to a status screen for the request.
 - e. The request must be approved before it will move from Authorization, through Fulfillment and eventually to Closed. Review the file linked on the status screen before approving the request.
- (4) To approve the Export Request, do the following:
- a. Through the IRWorks **All Menu**, type “Approvals” in the filter box and locate the “My Approvals” item in the “Self-Service” section.
 - b. On the Approvals screen, locate the request to be approved by matching the request ID (RITM) under the **Approval For** column with the RITM number provided when the export request was submitted. The **State** column should show “Requested” for the requested item. Click on Requested.
 - c. In the next screen, in the **State** drop-down, select “Approve” and then click “Update” located in the upper right corner.
 - d. Once approved, the request will move to the Fulfillment Stage to the Closed Stage and the export file will be placed on the MID server for pickup via EFTU. It will then be sent to the proper group to be processed.

Note: The Processing Date for the DCC.TXT file for the FY2026 Work Plan is **August 27, 2025**.

3.30.127.14
(09-30-2025)

**Initializing a Scheduling
Period and Generating
Prior Year History**

- (1) Following the completion of each reporting period, the Weekly OFP History will generate thirty days after the conclusion of that period. This listing can be used as a planning tool for preparation of the next year’s schedule. The Weekly OFP History contains weekly actual prior year data, by OFP code, for all organizations with Operations and/or Department totals.
- (2) To produce the Weekly OFP History, the Headquarters Submission Processing Resource Section will start the initialization process within thirty days of the end of the OFP History period. The Headquarters Submission Processing Resource Section will perform the following steps:
 - Complete Form 8242, Scheduling Date Master, to create the source document for the PCB 0121. The PCB 0121 establishes the date parameters for the new Work Schedule period.
 - Complete Form 8244, Scheduling Conversion Record, to create the source document for the PCB 0124. The PCB 0124 establishes the date parameters for the prior year period, the week ending dates and holidays.
 - Prepare the Automated Work Schedule (AWS) PCB Run Request PCB 00Q, Schedule Initialization, to initialize the period.
 - Prepare the Automated Work Schedule (AWS) PCB 03H, History Dump, to generate the PCB-03-40 OFP History Report.

- Send the Automated Work Schedule (AWS) PCB Run forms (PCB 00Q and PCB 03H) as well as Forms 8242 and 8244 to the Computing Center Scheduler via an IRWorks Incident Ticket and an email as a backup form of communication.

(3) The following table lists the processing dates for the Weekly OFP History (PCB 03-40) file:

Work Scheduling Period	Processing Date
January - June 2025	July 9, 2025
July - September 2025	October 8, 2025
October - December 2025	January 7, 2026 Note: The date for the October - December period falls into CY2026

(4) The following steps will help in submitting an Incident ticket in IRWorks:

- Through IRWorks **All Menu**, select “Incident” in the filter box and locate “Create New”.
- The Incident form will appear. Take note of the Incident Number at the top.
- All items with a red asterisk next to them are required fields.
- The following items will automatically be populated when the form opens:
 - Incident Number
 - Reported By
 - Customer
 - Location
- The user should fill in the following items:
 - Server - Data/Database
 - Contact Type - Email
 - Impact - 3 Multiple Users
 - Urgency - 3 Average
 - Assignment Group - Operations Svcs Unisys Support
 - Short Description - Run Request for OD FY2025 FY History & OD FY2026 Initialization
 - Description - Use the body of the email by copying and pasting it in the box
- Select Submit - User will receive an email from IRWorks confirming the ticket was opened.

3.30.127.15
(09-30-2025)

Work Planning and Control

- (1) The Headquarters Submission Processing Resource Section will create the PCB 0128, Schedule Master Files, for each campus and exporting each PCB 0128 file to the ECC-MTB and ECC-MEM for processing via the Electronic File Transfer Unit (EFTU) scanning system.

- (2) Each Campus Administrator will be responsible for validating their campus schedules via Control-D for accuracy before ECC-MTB and ECC-MEM processes the Work Schedule PCB 9011 Reel - Schedule Analysis Tape (Quarterly Data) file for their center.
- (3) The Work Schedule PCB Reels processed by ECC-MTB / ECC-MEM are to be transmitted timely to correspond with the chart below. The tapes will be electronically transmitted from ECC-MTB / ECC-MEM to Enterprise Computing Center (ECC-DET). See IRM 3.30.123, Processing Timeliness: Cycle, Criteria and Critical Dates for Work Planning and Control.

Final Campus Shipping Dates	Period Covered
June 17, 2025	FY25 J-S Final WS to be transmitted to ECC-DET by C:DC:TS:CAS:SP:PM:R
August 27, 2025	FY26 Final WP to be transmitted to ECC-DET by C:DC:TS:CAS:SP:PM:R
September 24, 2025	FY26 O-D Final WS to be transmitted to ECC-DET by C:DC:TS:CAS:SP:PM:R
December 17, 2025	FY26 J-J Final WS to be transmitted to ECC-DET by C:DC:TS:CAS:SP:PM:R

- (4) The final transmission dates are critical to ensure that a good PCB 90 is available to initialize the new quarter. Without a timely final work schedule PCB 90 available, the correct work schedule data will not be shown on the PCC-60-40, WP&C Managers Report. This would necessitate a run after the due date and delay when the correct work schedule data will appear on the PCC-60-40.
- (5) When an organization needs to run a work schedule through the PCB process after the due dates, as published above, they will need to request authorization through the system's business owner SE:W:CAS:SP:PM:R. ECC-MTB and ECC-MEM will not process a subsequent work schedule run after the due dates without authorization from the business owner.

3.30.127.15.1
(09-30-2025)
**Workload Scheduling
(PCB) Runs**

- (1) The data generated in the Work Schedule Spreads (WSS) Module is exported out and converted to a PCB 0128, Schedule Master File, which is used in the mainframe PCB runs to print daily and weekly workload management reports. These reports help each campus in comparing, tracking, projecting and negotiating their resource usage.
- (2) Prior to submission of the PCB runs to ECC-MTB or ECC-MEM, the Headquarters Submission Processing Resource Section must submit to ECC-MTB and ECC-MEM the Form 8242, Scheduling Date Master (PCB 0121), and the Form 8244, Schedule Conversion Record (PCB 0122), for the period being scheduled. See IRM 3.30.127.13 for more information.
- (3) The Headquarters Submission Processing Resource Section will create the PCB 0128, Schedule Master Files, for each campus and exporting each PCB 0128 file to the ECC-MTB and ECC-MEM for processing. However, each Campus Administrator will validate their schedules via Control-D for accuracy before ECC-MTB and ECC-MEM processes the Work Schedule PCB 9011, Schedule Analysis Tape (Quarterly Data), file for their campus.

- (4) Once validation is complete, each Campus Administrator will give the go ahead to ECC-MTB and ECC-MEM to process the Work Schedule PCB 9011 for their campus. In turn, ECC-MTB and ECC-MEM will provide the PCB 9011 Reel Number for the campuses. These numbers must then be submitted to DCC via email from Headquarters Submission Processing Resource Section to finalize the work schedule.
- (5) The following lists the PCB runs generated by ECC-MTB and ECC-MEM:
 - PCB00S - Inputs the PCB 0128.OUT schedule data and creates the Schedule Master File PCB 0128.
 - PCB 04 - Inputs the Schedule Master File (PCB 0128) and Summary Control Record (PCB 0129). The output is the Daily Workload and Staff Hour Schedule Report (PCB 04-40).
 - PCB 05 - Inputs the Schedule Master File (PCB 0128) and Summary Control Record (PCB 0129). The output is the Weekly Workload and Staff Hour Schedule Report (PCB-05-40).
 - PCB 80B - Inputs the Quarterly PC Tape PCB 7002 and produces the Quarterly PC Disc PCB 8002. The PCB 7002 is the Quarter ending data for each WP&C period.
 - PCB 80C - A continuation of the PCB 80B and inputs the Work Plan tape 540-81-11 from Work Plan and produces the Work Plan Disc PCB 8001 SC.
 - PCB 80 - Inputs the Quarterly PC Disc PCB 8002, the Schedule Master File PCB 0128, and the SC Work Plan Disc PCB 8001. It takes the Prior Year Actual, Work Schedule and Work Plan and creates the Schedule Review Master File PCB 8021.
 - PCB 85 - Inputs the Schedule Review Master File PCB 8021 and produces the Service Center Workload Schedule Review Report PCB-85-40, often referred to as the Three-Way Comparison Report.
 - PCB 90 - Inputs the Schedule Master File PCB 0128 and creates the Schedule Analysis Tape (DCC) Quarterly Data, PCB 9011, Schedule Master Tape (DCC) Weekly Data, PCB 9012, and the Schedule Master Tape (DCC), PCB 9013. The Schedule Master Tape PCB 9013 is later used to create the PCB 93, which is used in the initialization process for each WP&C period.

3.30.127.15.2

(09-30-2025)

Weekly Workload and Staff Hour Schedule

- (1) The Weekly Workload and Staff Hour Scheduled is produced by PCB 05. It contains data from the PCB 0128, Schedule Master File, displaying for each OFP code, the week's scheduled volume, production, standard, hours, and schedule staff weeks. Scheduled data for each week, as well as cumulative schedule for the period is displayed. Scheduled OFPs are summarized at the fourth digit of the program code. Operations for Submission Processing and Compliance Services, Operations and Departments for Accounts Management, and campus total levels.
- (2) When a Schedule Summary Control Record (PCB 0129), Form 8245, Schedule Summary Control Record, is used to specify the range of OFPs to be printed on the Weekly Workload Schedule and Summary, contact the ECC-MTB and ECC-MEM scheduler to use run condition work T-2.
- (3) To print the weekly schedule for organizations 31000 (Receipt and Control Operations), 34000 (Document Perfection Operations), and 35000 (Data Conversion Operations), the first OFP in 31000 and the last OFP in 35000 would be entered on Form 8245. If only direct programs are to be printed,

several ranges of OFPs will be entered on Form 8245. There is not a limit to the number of Forms 8245 that can be input to Run PCB 05. When a reorganization has occurred, this might impact the OFP range and will require a new Schedule Summary Control Record (PCB 0159), Form 8245, to be input. If a Schedule Summary Control Record is not input, the entire file will be printed.

3.30.127.15.3
(09-30-2025)

**Daily Workload and Staff
Hour Schedule**

- (1) The Daily Workload and Staff Hour Schedule is produced by PCB 04. It displays the volumes scheduled for each day. This is necessary for those areas that must schedule daily volumes and staff hours.

Note: For guidelines in scheduling cycles for Submission Processing programs, refer to the requirements in IRM 3.30.123 Processing Timeliness: Cycles, Criteria, and Critical Dates.

- (2) Form 8245, Schedule Summary Control Record (PCB 0129), is used to specify the beginning and ending OFP range to be printed on the Daily Workload and Staff Hour Schedule and Summary. To print the weekly schedule for organizations 31000 (Receipt and Control Operations), 34000 (Document Perfection Operations), and 35000 (Data Conversion Operations), refer to IRM 3.30.127.15.2 Weekly Workload and Staff Hour Schedule.
- (3) In addition to printing the daily schedule for the OFPs selected, the Daily Workload Schedule and Summary for Submission Processing provides 4th digit program code, function, and operation summaries and campus totals. It also provides direct, total overhead, and total hours for operations summaries and campus totals. While only the OFPs specified on the Schedule Summary Control Record are displayed on the daily schedule, the totals and summaries represent the total hours on the Schedule Master File for all OFPs, not just the selected OFPs.
- (4) To suppress summary printouts at desired levels, enter slashes (/) in the proper columns of Form 8245, Schedule Summary Control Report. If no suppression is desired, columns 1-8 may be left blank. The following chart shows the summary levels that can be suppressed by a slash (/):

/ In Column	Summary Level Suppressed
1	Suppresses summary at 4th digit of Program Code
2	Suppresses summary at 3rd digit of Program Code
3	Suppresses summary at 2nd digit of Program Code
4	Suppresses summary at 1st digit of Program Code
5	Suppresses summary at Function Level
6	Suppresses summary at Department Level
7	Suppresses summary at Operations Level
8	Suppresses 10000/50000 Total and Campus Level

3.30.127.15.4
(09-30-2025)

**Workload Schedule
Review (Three-Way
Comparison Report)**

- (1) Computer Run PCB 85 produces the Workload Schedule Review, Three-Way Comparison Report. This report displays the total hours, volume and production standards scheduled for the period by each OFP code. In addition, Work Plan and Prior Year Actual data are displayed for each OFP, with the difference between Work Schedule and Work Plan, and Work Schedule and Actual for hours, volume, and production standard printed as "+" or "-". All OFPs are summarized at each digit of program code, by Function and by Operations for Submission Processing and by Department and Operations for Accounts Management, in addition to Campus totals. Total direct hours, total overhead hours, and total direct and overhead hours are shown for each Operation and Campus, with variance from Work Schedule to Work Plan and Work Schedule to Prior Year Actual.
- (2) Campus officials may use the Workload Schedule Review Module as a convenient tool for reviewing the schedule and comparing this year's Work Schedule to Work Plan and Prior Year Data.