



**Council of Executive Secretariat  
U.S. Department of Treasury  
April 6, 2004**

**Showcase:** Process for handling an incoming letter that will have an outgoing response signed by the Secretary/top official

- Introduction to TACT (Treasury Assignment and Correspondence Tracking)
- Highlight Electronic Clearance Process - All letters, both for Secretary's signature and direct reply are completely electronic.
- Process Diagram Provided.
  - 1) Letter is Scanned/Indexed/Routed with distribution copies to the appropriate offices.
  - 2) Deadline is 7 Days for regular correspondence and 5 days for congressional correspondence. Every Monday, an automatic list of pending assignments is emailed to the appropriate office personnel. In cases where an assignment is overdue more than 2 weeks, the items are also sent to the Assistant Secretary or Bureau Head, copying the Secretary.
  - 3) Responses are prepared by the appropriate Assistant Secretary's office, Bureau or within the Executive Secretariat (in a limited number of cases).
  - 4) The response is written and uploaded into the system. It is moved electronically to the appropriate offices for clearance (General Counsel and Legislative Affairs). All Congressional letters for Secretary's signature must be cleared by the Assistant Secretary for Legislative Affairs. All documents for Secretary's signature must be cleared by the General Counsel or the Deputy General Counsel. No exceptions. The offices are capable of attaching editable documents so that changes can be made later in the clearance process.
  - 5) For responses requiring the Secretary's signature, the Executive Secretariat edits documents for signature, as necessary, and prints out the response. Once it is signed by the Secretary, the final copy is scanned in and the folder is closed out. For direct reply responses, a copy of the letter is scanned into the system and the folder is electronically sent back to the Executive Secretariat to close out.
  - 6) All items for signature are put in a signature folder daily. Each item has a cover memo to the Secretary from a direct report, then the item for signature, a tab with the incoming letter (if appropriate), then another tab for clearances/concurrence.
  - 7) Treasury faxes correspondence to everywhere outside the DC area. A fax card is included in the hard copy that is mailed indicating the recipient and date the fax was sent.

# Assignment and Correspondence Tracking in Policy Offices

