

**Ethiopian TVET-System**



# **Clerical Work Support**

## **Level-II**

**Based on August 2012 G.C. Occupational Standard**

**Module Title: Handling Mail**

**TTLM Code: EIS CWS2 TTLM 0919V1**

**This module includes the following Learning Guides**

**LG08: Receiving and dispatching incoming mail**

LG Code: - EIS CWS2 M03 LO1-LG08

**LG09: Collect and dispatch outgoing mail**

LG Code: - EIS CWS2 M03 LO2-LG09

**LG10: Organize urgent and same day deliveries**

LG Code: - EIS CWS2 M03 LO3-LG10



Instruction Sheet	<b>LG08:Receiving and dispatching incoming mail</b>
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This learning module is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Ensuring *incoming mail* is *checked* and *registered*
- Identifying titles and locations of company personnel and departments
- Identifying and distribute urgent and confidential mail
- Sorting and despatch mail
- Recording and/or reporting *damaged, suspicious or missing items*

First learning guide will also assist you to attain the following content. Specifically, upon completion of this Learning Guide, you will be able to:

- Ensure ***incoming mail*** is ***checked*** and ***registered***
- Identify titles and locations of company personnel and departments
- Identify and ***distribute urgent and confidential mail***
- ***Sort*** and despatch mail
- Record and/or report ***damaged, suspicious or missing items***

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below
3. Read the information written in the information “Sheet 1 and Sheet 2, Sheet 3, Sheet 4, Sheet 5.
4. Accomplish the “Self-check -1 and Self-check- 2, Self-check- 3, Self-check- 4, Self-check- 5.
5. If you earned a satisfactory evaluation from the “Self-check” proceed to “Other learning outcome.

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Information Sheet-1	Receiving and dispatching incoming mail
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## LO1.Receiving and distributing incoming Mail

- 1.1- Ensuring *incoming mail is checked and registered.*
- 1.2- Identifying titles and locations of company personnel and departments.
- 1.3- Identifying and *distributing urgent and confidential mail.*
- 1.4- *Sorting* and despatching mail.
- 1.5- Recording and/or reporting *damaged, suspicious or missing items.*

### INTRODUCTION

As you know in every office, a large volume of communication—letters, circulars, telegrams are sent to outsiders or received from them. Inside the organisation also written materials are exchanged between different departments. A planned and efficient handling of the mail is essential for the success of any business organisation. It is described as the backbone and an integral part of an office



#### 1.1- Ensuring incoming mail is checked and registered

Mail refers to written communications sent and received by all organizations.

Processing incoming and outgoing mail is an important daily routine and businesses generally develop procedures and practices to ensure that mail reaches the right person promptly and that transactions involving mail are recorded accurately to reduce the chance of lost mail and disputes about whether or when items were received or sent. In large organizations there is a separate department to handle the large volume of mail received and sent. In a smaller organization the office assistant or receptionist handles mail as part of his/her office duties.

**Mail can be delivered by post using a:**

- Postal service
- Courier delivery
- Personally

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- DX delivery (document exchange)

**Mail can also be delivered electronically by:**

- Facsimile machine (fax)
- Email
- The internet

**INCOMING MAIL**

Incoming mail is mail that is distributed within the business. It may come from external sources or it may come from within the organization itself.

Many businesses revolve around what is received in the daily mail, so it is essential that all inward communications are promptly and correctly processed and distributed.

A large organization may have a central mail room where incoming mail is sorted, opened and then delivered, whereas smaller organizations generally allocate these duties to a member of the office staff.

**INCOMING MAIL INCLUDES:**

- ✓ confidential/personal mail
- ✓ urgent mail
- ✓ electronic mail (e.g. faxes, emails to a central address)
- ✓ letters and other forms of correspondence
- ✓ orders, invoices, statements and other financial documents
- ✓ journals/magazines
- ✓ parcels
- ✓ internal mail, such as memos, reports or other information sent between departments or staff
- ✓ junk mail

**Receiving the mail**

- 📁 Collected from a post office box or locked private mail bag at an Australia Post Office
- 📁 Delivered to the office by regular post delivery
- 📁 Transmitted by fax or email
- 📁 Delivered by courier or messenger
- 📁 Collected via the DX system

**Completing a Mail Register**

Many businesses require a record to be kept of all correspondence received.

**A mail register provides:**

- ❖ Evidence of the date the item was received
- ❖ A note of any enclosures

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- ❖ A record of who the mail was assigned to
- ❖ An opportunity to monitor follow-up action

**A mail register generally indicates:**

- ❖ The date the correspondence is received
- ❖ The name of the company who sent it
- ❖ Briefly what the subject is
- ❖ If there were any enclosures
- ❖ The person or section to whom the document was assigned
- ❖ Action taken

**Type of information to record**

You will need to record information in a register.

**The type of information you may be asked to record in the register includes the:**

- ✓ date of dispatch
- ✓ sender's name
- ✓ sender's department
- ✓ addressee or organization
- ✓ type of service used; for example, Express Post
- ✓ reference number; for example, Australia Post prepaid Express Post envelopes
- ✓ contain a bar-coded reference number for the sender to keep
- ✓ receipts attached where appropriate; for example, receipts issued for registered
- ✓ mail items to provide evidence the item has been sent

***Incoming mail takes all of the following forms:***

<b>PAPER-BASED DOCUMENTATION</b>	<b>PACKAGES</b>
<ul style="list-style-type: none"> <li>• Letters</li> <li>• Internal memoranda</li> <li>• Journals/magazines</li> <li>• Plans</li> <li>• Legal contracts</li> <li>• Brochures</li> <li>• Reports</li> </ul>	<ul style="list-style-type: none"> <li>• computer disks</li> <li>• tapes</li> <li>• CD Rooms</li> <li>• Product samples</li> <li>• Books</li> </ul>
<b>ELECTRONIC DOCUMENTS</b>	<b>FINANCIAL/ACCOUNTING DOCUMENTS</b>
<ul style="list-style-type: none"> <li>• Faxes</li> <li>• Emails</li> <li>• Internet communications</li> </ul>	<ul style="list-style-type: none"> <li>• Cheques</li> <li>• Invoices</li> <li>• Bank statements</li> </ul>

So that mail can be tracked through the organization, incoming mail must be accepted, registered, checked that it is all present and correct, and sorted and passed on to the correct person or department within a suitable time frame.

**Some examples of problems that could happen during the handling of incoming mail**

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Stage	Problems
Accepting mail	If a parcel is delivered by courier and it is not signed for, it may not be possible to trace it later if it does not reach the intended receiver.
Registering	If a legal contract is not date stamped and recorded, it may be difficult to establish when the contract came into force.
Checking that it is all present and correct	If a cheque should have been delivered with a letter but has not been, it may be difficult later to determine whether or not the customer has paid for their goods
Sorting	If mail is incorrectly sorted, it could get lost, misfiled and not reach the intended receiver.
Distributing to correct person	If mail is addressed to a staff member who has since left the business, it may get lost or not acted upon if a decision is not made as to who should now receive the mail.
Within a suitable time frame	If 'urgent' mail is not attended to quickly, the receiver is not able to take action straight away and problems could occur.

<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

1- Explain the incoming mail and what it includes? 3 point

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1- Explain what mail register indicates? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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## 1.2- Identifying titles and locations of company personnel and departments

### Collecting mail from the post office

If the business rents a post office box, it is usual for an employee to collect the mail on their way to work.

Before leaving the post office, the person should check through the mail for:

- ✓ A card from Australia Post indicating that there are items of mail which do not fit into the box, and which must be collected from the counter.
- ✓ Any mail for another company which has been placed in your box by mistake.

If the post office is some distance from the office, it may be better to wait until after 9 am when the post office is open to collect the mail. Alternatively, the post office can be revisited later in the day if larger items need to be collected or incorrectly-sorted items handed in over the counter.

### OPENING THE MAIL

All organizations will have procedures to follow for processing the mail. In most organizations, **all** mail is opened, even if it is addressed to an individual, on the basis that mail addressed to employees will be of interest to the business. Letters are opened by hand with the help of a paper knife. If the number of letters is very large, a letter opening machine may be used. The mail should be opened carefully to ensure safety of mail. It must also be seen that no papers are left inside the envelope. A responsible officer should supervise this process.

The contents of the envelopes should be scrutinized to find out the purpose of the correspondence and the department to which it relates. If there are enclosures, they should be checked to verify that they are in order. Any discrepancy should be brought to the notice of the mail room supervisor especially when the enclosures are cheques, drafts, postal orders, et. The following points are general **guidelines** for opening the mail, but always check with your organization for its preferred procedures.

1. Sort the mail into Names or Departments
2. Put letters marked 'Confidential' or 'Personal' to one side – DO NOT OPEN
3. Tap each letter on the desk so the contents fall to the bottom.
4. Using a letter opener (manual or electric), carefully slit the top of each letter.
5. Date stamp each item to indicate when it was actually received. Traditionally, the stamp is placed on the top right hand side of a letter, but it depends on the layout of the document.
6. Stamp any cheques not already so marked with a 'Not Negotiable' stamp.



7. Briefly look at each letter and check if all enclosures are there. If any are missing, note it on the bottom of the letter and in the inward mail register, and contact the sender as soon as possible to let them know.
8. Attach any loose enclosures with a paper clip or a temporary staple. Fasten across the top left-hand corner so pages can easily be turned.
9. Repair any damaged mail with sticky tape.
10. In accordance with company procedures, either attaches the envelope to the back of each letter with a paper clip, or place emptied envelopes inside the largest envelope received and retain them for a day. This will allow any attachments mistakenly left inside or a return address on an envelope, accessible for the day.
11. When collecting faxes, check the number of pages received against the cover sheet, which will indicate how many pages should have been received. If any pages are missing, telephone the sender immediately and ask them to resend the missing pages.
12. If it is company policy, write the details of each item of mail received in the INCOMING MAIL REGISTER.
13. Sort the mail in order of importance, with the letters marked 'Confidential' or 'Personal' unopened on top.
14. Place all the mail in a manila folder ready for distribution.

**Mail Opened by Mistake**

If you inadvertently open a letter marked 'Confidential' or 'Personal', place it back in the envelope and reseal it with sticky tape, and then write on the front of the envelope "Sorry, opened by mistake" and sign your name.

Self-Check -2	Written Test
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**Directions:** Answer all the questions that are you are asked below.

**1- What are the general guidelines for opening the mail? 3 point**

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**2. - If Mail is opened by Mistake what can be done? 3 point**

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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### 1.3-Identifying and *distributing urgent and confidential mail*

#### DISTRIBUTING THE MAIL

In a small business, the manager may wish to peruse all incoming mail before it is distributed, whereas in a large organization, the mail may be distributed to the manager of each department. Urgent and confidential mail should be dealt with according to your organization’s policies and procedures.

#### Urgent Mail

Priority should be given to urgent mail. Some mail is marked ‘Urgent’ on the packaging, or it could be received by fax, courier, and messenger, Registered Mail or Express Post. An organization may have specific procedures in place for sorting and distributing urgent mail, but generally, you should either deliver urgent mail immediately to the person it is addressed to, or make sure it goes to the top of the pile when you are prioritizing mail for that person.

#### Circulation slips

Some mail may need to be given to a number of people. The most efficient way to organize wide distribution is to attach a circulation slip, listing all the names of the people who must read the item, to the documentation. Everyone then initials the circulation list when they have finished reading the attachment, and passes it on to the next person on the list. When everyone on the list has seen the document, it is filed away. An alternative is to photocopy the documentation and place it in individual staff member’s pigeon holes or incoming mail trays.

Opened mail is then sorted with the most urgent and important items on the top.

#### A suggested order of priority is:

- Urgent mail/confidential mail
- Cheques
- Account for payment
- Parcels
- Magazines
- Trade journals
- Newspapers and advertising matter

#### Circulating Mail

Some mail may need to be circulated to all staff, or to a particular group of staff. For example, magazines or trade journals may need to be circulated to each member of a certain department each month. These documents may be circulated to various staff by: Listing their

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names on a distribution sheet (also referred to as a circulation slip) attached to the documents.

- ❖ Prioritizing the order of distribution if required, with the person responsible for storing the document last on the distribution list.
- ❖ Providing a column where recipients can initial and date to verify that they have viewed the documents.
- ❖ Storing the documents once they have been viewed.

If the documents are confidential, they can still be circulated by attaching a distribution sheet to the front of a well-sealed envelope. The seal can be initialed over so that any tampering will be apparent. Interoffice mail is generally circulated from one department to another within an organization in unsealed, reusable envelopes of various sizes. The receiver reuses the envelope by crossing out their name and readdressing it:

<b>Confidential mail</b>	<b>Urgent mail</b>
<ul style="list-style-type: none"> <li>❖ Mail marked confidential, personal or private should not be opened, unless you are authorized to open it.</li> <li>❖ If you open this mail by mistake, you should quickly reseal the envelope with tape and write on it 'Opened by mistake' and your initials.</li> <li>❖ It is not possible to do this for faxes and emails.</li> <li>❖ If an email message is marked confidential and the addressee's name is written in the message subject line, you can leave it unopened and forward it to the receiver or send a message to let them know the mail has arrived</li> </ul>	<ul style="list-style-type: none"> <li>❖ Some mail is marked urgent. If it is also marked confidential or personal, you should treat it as confidential first and not open it.</li> <li>❖ You can either deliver urgent mail immediately to the person it is addressed to or you can make sure it goes to the top of the pile when you are prioritizing mail for that person.</li> <li>❖ Another form of urgent mail is Express Post.</li> <li>❖ The sender pays extra postage for an item to be priority processed for prompt delivery, usually the next working day.</li> <li>❖ An organization may have specific procedures in place for sorting and distributing urgent mail.</li> </ul>



**Self-Check -3**

**Written Test**

**Directions:** Answer all the questions that are you are asked below.

1- Explain distributing the mail? 3 point

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2- Differentiate confidential mail and Urgent mail? 3 point

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Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_



### 4.1- Sorting and despatching mail

#### Opening, sorting and prioritizing incoming mail

Workplaces have procedures to ensure that all incoming mail is treated in an appropriate, consistent and efficient manner, to give employees a framework so that they know what is expected of them – both by the organization itself and by senders of mail.

A specific area should be set aside for the sorting of mail – all necessary equipment can be on hand in this area. Mail should be sorted into categories. **Urgent mail** should be delivered to relevant personnel immediately. Articles marked “**Confidential**” or “**Private**” should be set aside for the attention of the person named, and not opened. If an article of mail is opened in error, it should be resealed and marked “opened in error” on the envelope that includes your initials and the date. Other mail can be opened by the office assistant or receptionist.

Mail should be date stamped, also with the time received, and with the initials of the person opening it. Envelopes should not be destroyed until the return address is checked. Ensure that all enclosures have been received. If any are missing, add a notation to the correspondence. Enclosures should be attached

#### Prioritizing Mail

Mail should be sorted in order of importance and then placed neatly in a manila folder or folders for distribution. It is important that mail is not lost or misplaced in this process, so follow these simple guidelines when prioritizing the mail:

1. Personal or confidential letters, unopened, are at the top of the pile.
2. Any **small** items such as a receipt that is not accompanied by a letter, and may be easily lost.
3. Any letter, fax etc that needs to be dealt with **urgently** (consider deadlines etc)
4. Letters with cheques attached
5. General correspondences such as letters or faxes with all attachments fastened securely
6. Financial documents such as invoices, adjustment notes and bank statements
7. Quotations, orders, drawings
8. Relevant promotional literature and flyers
9. Trade journals
10. Price lists and catalogues
11. Newspapers
12. Junk mail

Remember, this order is only a guide, placing unopened, small and urgent mail at the top of the pile, general correspondence in the middle, and the larger books and newspapers at the bottom.

#### DISPATCHING MAIL

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When the mail has been opened, sorted, recorded and prioritized, it needs to be dispatched to the nominated person. This may be to the manager of the business, to a department manager, to an administrative support person in a particular department, or to an individual addressee. What method is used depends on the size of the organization, whether there is a pigeon hole system for departments or individuals, and other organizational requirements. Pigeon holes are a cabinet with many slots inserted, and each slot has the name of an individual or a department on it.



<b>Self-Check -4</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

1- What is Prioritizing Mail? 3 point

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2- What is dispatching mail? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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### 5.1- Recording and/or reporting *damaged, suspicious or missing items*

#### Recording incoming mail

Methods of recording mail will vary from employer to employer. Some businesses may record all incoming mail in an **Inwards Mail Register** or it may be only used to record cheques, money orders or valuable and important documents, information which may be required at a later date.

An example of an **Inwards Mail Register** is shown below.

<b>INWARDS MAIL REGISTER JONES CLEANING SERVICES</b>				
<b>Date</b>	<b>Nature of mail</b>	<b>Received from</b>	<b>Enclosures</b>	<b>Passed to</b>
4 July 07	Business cleaning service	Casey Consulting	-	James White
7 July 07	Rates enquiry	Simone Davis	Plan of offices	Shirley Black

Many businesses recycle certain envelopes. It is possible to reuse large postage packs. Other mail matter which is no longer of use can be shredded or placed in a recycle bin

#### Suspicious Mail

Some organizations are prone to receiving suspicious mail, particularly political or religious organizations. However, everyone should remain vigilant to suspicious mail. It is any mail that looks unusual, makes noises or smells strange. Mail that has been re-sealed and looks as if it was previously opened or interfered with, or is delivered in a way that cannot be identified, should also be treated as suspicious. NEVER open suspicious mail, and do not touch or move the item. Notify your supervisor or your organization’s security staff immediately, and follow their directions and organizational policies such as evacuation procedures.

If your organization has concerns regarding security issues, it may have an X-ray machine to check the safety of incoming mail. In this case you would be required to follow specific procedures, and training would be provided. The office assistant/receptionist should be aware of the recommended procedures to follow if a suspicious mail package is received. The Attorney-General’s Department has released a fact sheet on dealing with suspicious mail. Refer to their website for more details, at [www.ag.gov.au/department.html](http://www.ag.gov.au/department.html).

#### Characteristics of suspicious mail:

- Handwritten or poorly typed address
- Addressed to someone no longer with the organization

- Incorrect title but no name
- Misspelled words
- No return address
- Postmark shows a city or State that does not match the return address
- Excessive postage
- Excessive tape, string or wrapping
- Unexpected or from someone unfamiliar to the recipient
- Of unusual weight, given its size, or lopsided or oddly shaped
- Has protruding wires
- Has a strange odor, or is stained or discolored
- Makes a noise
- Leaking unidentified powder

## DAMAGED MAIL

Mail may have become damaged in the course of its travels. For example it may have got wet, crushed, torn or the name of the recipient may have been smudged or torn off, so that it can no longer be read. In these cases, an appropriate note should be made in the Inwards Mail Register. The mail should be opened and the recipient identified, if possible by the contents (eg. their name may appear on a letter inside the item). If the recipient cannot be identified, and it is unclear what the item relates to, you should try to establish the sender's details and contact them to find out more information

### Incoming mail may be damaged for a variety of reasons:

- ☞ Mail exposed to weather (e.g. water damage from rain)
- ☞ Mail roughly handled (e.g. broken contents, torn address labels)
- ☞ Pilfered mail (contents may be missing, parcels slit open)

### DAMAGED MAIL



### DAMAGED MAIL

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Self-Check -5	Written Test
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**Directions:** Answer all the questions that are you are asked below.

1- What is Suspicious Mail? 3 point

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1- What are the Characteristics of suspicious mail? **3 point**

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**Note:** Satisfactory rating – 5 and above points

**Unsatisfactory - below 5 points**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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Instruction Sheet	<b>LG09. Collecting and dispatching outgoing mail</b>
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This learning module is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Collecting, checking and sorting outgoing mail
- *Recording and processing outgoing mail*
- Dispatching mail to meet designated time lines

Second learning guide will also assist you to attain the following content. Specifically, upon completion of this Learning Guide, you will be able to:

- Collect, check and sort outgoing mail
- **Record** and **process** outgoing **mail**
- Dispatch mail to meet designated time lines **items**

#### **Learning Instructions:**

6. Read the specific objectives of this Learning Guide.
7. Follow the instructions described below
8. Read the information written in the information “Sheet 1, Sheet 2 and Sheet 3.
9. Accomplish the “Self-check -1 and Self-check- 2, Self-check- 3.
10. If you earned a satisfactory evaluation from the “Self-check” proceed to “Other learning outcome.

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Information Sheet-1	Collecting and Dispatching outgoing mail
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## LO2. Collecting and dispatching outgoing mail

- 2.1- Collecting, checking and sorting outgoing mail
- 2.2- **Recording** and **processing** outgoing **mail**
- 2.3- Dispatching mail to meet designated time lines

### 2.1- Collecting, checking and sorting outgoing mail

#### OUTGOING MAIL

Outgoing mail should be collected from designated collection points at regular intervals throughout the day and prepared for posting.

The greater the volume of mail to be handled, the more frequently it should be collected to allow continual preparation and to avoid ‘bottlenecks’ towards the end of the day. The procedures will state:

- The time the mail is to be at the collection point(s) so all staff are aware of the latest time for mail to be collected
- The time that the Mail Clerk is to be at the Post Office.

The Mail Clerk should also know the other services offered by Australia Post. Full information on these services can be obtained through your local Post Office. The Postal Charges Booklet that all businesses should keep up-to-date also gives most of the important details of available services.

#### CHECKING OUTGOING MAIL

Outgoing mail should be checked thoroughly before dispatch so that there are no delays caused by errors in addressing, packaging, enclosures, etc.

The following is a list of things that should be checked before mail is dispatched:

- Check that both the letter and the envelope are addressed to same person
- Check the letter has been signed
- Check that all relevant enclosures are included in the envelope/package
- Use file reference numbers on letters for identification purposes
- Check that the return address is included
- If using recycled packaging, ensure any previous address is covered up

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- Ensure that packaging is secure (breakable articles should be wrapped using bubble wrap, polystyrene foam, shredded paper, cotton wool or padded bags).

## ORTING OUTGOING MAIL

Mail must be sorted according to its destination, size, weight and method of posting to ensure it is processed and sent as quickly as possible.

Letters should be sorted into the following categories:

- Local
- Elsewhere
- Overseas

**Bulk Mail** has a range of services and discounts suitable for businesses that post mail in large quantities. Bulk mail options are generally used for marketing mail outs, publication mail outs, flyers and local mail.

There are **THREE** categories of bulk mail:

- 1) **Pre-Sort discounts** – mail is sorted by postcodes before being lodged with Australia Post
- 2) **Bulk Local Delivery Service** – discount rates apply to local organizations sending large quantities of mail at the counter of the local Post Office
- 3) **Print Post** – a service for the delivery of publications. Publishers of regular newsletters and magazines can save money using this service

## PARCELS

Parcels can be sent by:

- Parcel Post
- Express Post
- Registered Post
- Air mail
- Courier



## STEPS TO FOLLOW

1. **Sort** – sort mail into categories as defined above
2. **Bundle and Batch** – bundle up categorized mail and place rubber bands around each pile to secure

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### 3. Postage Charges – calculate postage charges

#### Correctly Preparing Items for Dispatch

Before posting, mail should be checked for accuracy and completeness. This includes checking that:

- ❖ the letter and envelope are addressed to same person
- ❖ all letters and cheques have been signed
- ❖ all enclosures or attachments are included and are securely fastened to letters
- ❖ address details and layout are correct
- ❖ the address is correctly positioned if using window-face envelopes
- ❖ a return address is included
- ❖ letters are folded correctly to ensure minimum creasing and ease of opening
- ❖ parcels are securely packaged
- ❖ If possible, all matter for one address is assembled together to go in one envelope.

Sort the mail into similar items – parcels, general letters, special services such as express or registered mail, overseas mail – to take advantage of cost savings and to more easily calculate postage.

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<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

1- What is outgoing mail? 3 point

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2- How to sort outgoing mail? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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<b>Information Sheet-2</b>	<b>Recording and processing outgoing mail</b>
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## 2.2- Recording and processing outgoing mail

Recording and processing outgoing mail for dispatch and *Recording* outgoing mail may include:

- Electronic (specialist software, database, spreadsheet systems)
- paper-based (mail book, form, file)

*Processing mail for dispatch* may include:

- calculating and paying for postage
- DX mail
- registering mail

### **ALCULATING THE COST OF POSTAGE**

It is important for the Mail Clerk to accurately calculate the cost of each article from the organization. The cost of the article is calculated according to the following criteria:

- Size
- Thickness
- Weight
- Destination of article
- Any extra services required (eg. registered, express post)



Always ensure that an up-to-date Postage Charges Booklet is in the mail room/desk of your organization.

### **MAILING SERVICES**

There are a range of mail services available, both from Australia Post and private providers. Conditions and costs vary, and change periodically.

- ☞ Decide on the type of service required – normal post, express, registered, bulk, Document Exchange, fax or email.
- ☞ Choose the most appropriate carrier – Australia Post, a courier service, or DX Mail.

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**This could depend on:**

- ❖ The type, size and weight of items to be lodged
- ❖ Cost of the different services
- ❖ Destination and urgency of delivery
- ❖ Necessity for proof of delivery
- ❖ Number of items being dispatched

📁 Process in accordance with the organizational requirements of that carrier – address requirements, packaging, and documentation.

**Correctly Addressing the Mail**

The speed and success of delivery of your mail depends on correct details on the envelope. Australia Post stipulates the following guidelines for correctly mail to allow for efficient processing:

- Display correctly – use ‘open punctuation’ (this means no unnecessary punctuation – no commas at the end of each line, no full stops after Titles or between the initials of States etc)
- Use the addressee’s full, correct name
- Street number using a dash to indicate a number range e.g. 231-251 Smith Street
- Flat, unit, apartment or suite number in conjunction with the street number e.g. 3/21 Smith Street
- Floor or Level using a comma to separate from the unit and street address e.g. Level 5, 3/21 Smith Street
- City, State and Postcode as the last line of the address – **ALL IN CAPITAL LETTERS AND PUNCTUATION FREE**
- Don't indent or stagger address lines - each line should start at the same point on the left hand side.
- Do not underline anything - no words in the address should be underlined.
- Do not use postcode squares for machine-addressed letters.
- Include your return address on the envelope
- Attach appropriate stickers

Maxamilion Strauss PO Box 828 HORNSBY NSW 1630  <b>REGISTERED POST</b>	<div style="border: 1px solid black; width: 150px; height: 80px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">             Postage Paid Ethiopia           </div>	The Manager Auchenflower International Trading Co Level 8, 3/241 Raymond Street ARTARMON NSW 2064





## Addressing Letters to Businesses

**A letter must always be addressed to a person at the place of business.**

- For a Company, address the letter to The Manager  
E.g. The Manager  
Arnott's Biscuits Pty Limited
- For an Organization or Club, address the letter to The Secretary  
E.g. The Secretary  
Nelson Bay Netball Club Inc
- For several people use their titles to address the letter  
E.g. Messrs Noel Brown and Associates  
Messrs Dick Smith and Rod Taylor, but  
Mr Ali and Miss Hawoaden
- The person's position in the business may follow their name  
EgHawoadenand Mr Ali  
Solicitors  
Mr Abdirahman  
Managing Director  
AMP Pty Limited

## PROCESSING THE OUTGOING MAIL

In a small organization, the outgoing mail is generally collected and processed by a nominated member of the office staff. However, in a large organization, outgoing mail is generally:

- Placed in **out trays** on people's desks
- Collected several times throughout the day and processed
- Taken to a mailing department for dispatch

## Equipment Used in Processing Outgoing Mail

- ❖ A letter gauge indicating whether letters will be classified as small (standard) or large letters
- ❖ A Postcode book
- ❖ A set of scales to weigh large letters and parcels to help determine cost of postage
- ❖ A current Postal Charges Book or access to the internet to calculate exact postage
- ❖ Stamps or postage meter, or documents required for paying postage, such as by bulk mail
- ❖ Assorted special stickers and envelopes, eg Fragile, Airmail, Express Envelopes
- ❖ Paper clips, stapler, packaging materials, string and labels for secure packaging

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- ❖ An Outward Mail Register to record all outgoing mail
- ❖ Mailing lists for regular volume mailings

<b>Self-Check -2</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

1- How to calculate the cost of postage? 3 point

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2- How to Address Letters to Businesses? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_



<b>Information Sheet-3</b>	<b>Dispatching mail to meet designated time lines</b>
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### 2.3- Dispatching mail to meet designated time lines

Mail should always be forwarded to the time lines so the organization can conduct its business effectively. Speak to your supervisor if you ever have any problems with the timelines. Sometimes the problems will be out of your control; for example, if the mail is delivered late. You can distribute mail in various ways. For example, you might place mail for each person in a separate folder and deliver it to their in-tray.

Some organizations may have an area where employees collect mail and you may be responsible for depositing mailing the correct pigeonholes. Large organizations may have mail collection points for each department. Organizations with numerous offices in various location specified collection points and pick-up there may be a number of different internal distribution systems operating at the same time.

Once you have checked all mail items have been correctly processed, they are ready to send. In some organizations, you will have to take the mail to the post Office. In other organizations the mail is collected from the front office. If you have large quantities of mail to send, it may be easier to wheel the mail to the post office on a trolley, ask a colleague to help you, or make two or more trips. Remember to follow the appropriate work health and safety guidelines when processing and Transporting mail.

Refer to your workplace policies and procedures for guidance or ask your supervisor. Time lines and deadlines are extremely important when handling mail. To understand why, think of some of the reasons people send mail. For example, an Organization may pay for goods and services through the mail. When accounts Are left unpaid, supply may be stopped. Contracts for future projects may require Documents to be signed and sent urgently to close a deal. Many official documents, such as those for the Australian Tax Office, must be lodged by a certain date to avoid fines.

#### Dispatch mail on time

It is important for mail items to reach their destination on time, in their original condition.

#### Here are some tips for dispatching mail on time.

- ✚ **Prepare mail on time-** Familiarize yourself with the length of time it takes to send Different sorts of items.

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**Choose a mail service**-Choose the appropriate mailing service to get the item to the addressee on time.

Distribution lists store names and addresses of frequently used contacts and is used, for example, when sending bulk e-mail.

<b>Self-Check -3</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

**1-** How to Dispatch mail? 3 point

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**2-** How to dispatch mail on time? 3 point

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Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_



Instruction Sheet	<b>LG10:Organizing Urgent and same day deliveries</b>
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This learning module is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Evaluating *delivery options* and selecting *best option*
- Preparing items for urgent delivery and carrier specifications
- Organizing lodgment or pick up of emergency deliveries and follow-up

Third learning guide will also assist you to attain the following content. Specifically, upon completion of this Learning Guide, you will be able to:

- Evaluate **delivery options** and select **best option**
- Prepare items for urgent delivery and carrier specifications
- Organize lodgment or pick up of emergency deliveries and follow-up

**Learning Instructions:**

11. Read the specific objectives of this Learning Guide.
12. Follow the instructions described below
13. Read the information written in the information “Sheet 1 and Sheet 2, Sheet 3
14. Accomplish the “Self-check -1 and Self-check- 2, Self-check- 3.
15. If you earned a satisfactory evaluation from the “Self-check” proceed to “Other learning outcome.



Information Sheet-1	Evaluating <i>delivery options</i> and selecting <i>best option</i>
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### LO3.Organizing Urgent and same day deliveries

- 3.1- Evaluating *delivery options* and selecting *best option*
- 3.2- Preparing items for urgent delivery and carrier specifications
- 3.3- Organizing lodgement or pick up of emergency deliveries and follow-up

#### 3.1- Evaluating *delivery options* and selecting *best option*

**Evaluating delivery options and selecting best option** *Delivery options* may include:

-  Courier
-  Express mail
-  Overnight bag
-  DX mail

#### **Courier services**

Items are usually sent by courier when they are urgent and when other mail services cannot deliver the item within the necessary time frame. Couriers may also be used when items are fragile or confidential and need to be delivered to a specific person.

#### **Some courier services include:**

- ✓ door-to-door service
- ✓ guaranteed one-hour service in your area for urgent documents
- ✓ same day service
- ✓ overnight express
- ✓ International services.

#### **Express Post**

Express Post is a service offered by Australia Post that guarantees delivery to capital cities by the next business day. However, you should be aware that it generally takes two days if the recipient’s address is beyond the metropolitan area. Prepaid envelopes in a range of sizes are available for flat documents as well as parcels. This service is an appropriate option for urgent deliveries.

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## **DX mail**

Using the DX Mail service is an efficient way of sending and receiving mail. However, organizations have to be members of DX Mail and pay an annual membership fee to receive and send mail in this way. If your organization is a member, find out if any of your customers are fellow members because using this service may be appropriate for sending urgent mail.

### **Best option may include:**

- Cost
- Delivery location
- Nature of contents (bulky, fragile, confidential)
- Quantity of delivery items
- Time constraints

### **Delivery Options for Sending Parcels through a Courier Service**

Couriers provide a carrier service for letters and parcels to most areas within Australia, and overseas. Couriers are often used to send documents or parcels:

- That have to arrive at their destination very quickly
- That are too big or too heavy to send through the normal channels of Australia Post
- That are fragile
- That require special security

### **The cost of sending an article by courier will vary depending on:**

- ❖ The size of the article
- ❖ How much the article weighs
- ❖ The distance the article is going
- ❖ The urgency for it to arrive
- ❖ The nature of the article e.g. fragile, confidential, perishable
- ❖ Whether any discounts are offered by a preferred courier service

If you are asked to organize a courier you should always check if the Company has a preferred supplier, who may offer discounts to regular customers. If the business does not have a contract with a courier, you should obtain quotes from several freight companies and compare prices. The Yellow Pages provides a list of couriers, as well as details about the services they offer, such as delivery routes and timeframes.

A consignment note should be attached to all articles, showing clear details of senders and recipient's name and address. The pick-up driver will sign the consignment note and leave a copy, providing proof of dispatch. It is also usual for courier companies to have the recipient sign for receiving the delivery as proof of delivery. Records of all consignments should be kept. Good record keeping allows the follow up of any missing documents or parcels.

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Sometimes, follow up can be in the form of a phone call to confirm that the goods have arrived, or to advice of their dispatch. Also, some companies allow tracking of consignments online by quoting their consignment number.

When a package is received, it should be examined for any obvious damage, and then opened as soon as possible so that its contents can be checked against the delivery docket or tax invoice. If goods are missing or damaged, notify the sender as soon as possible to inform them and request a refund or replacement of the missing/damaged items.

<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

1- When do we need to use Courier services? 3 point

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2- Differentiate Express mail and DX mail? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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<b>Information Sheet-2</b>	<b>Preparing items for urgent delivery and carrier specifications</b>
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### 3.2 Preparing items for urgent delivery and carrier specifications

The particular method of delivery for an urgent mail item will depend on a number of factors including when the mail needs to reach its destination and the location of the delivery point.

**For example**, an item may need to reach its intended address within two hours. The best option in this instance may be to use a courier, however if the address is close by and you have time then it may be better to hand deliver the item. In order to identify the best method for an urgent delivery, you need to ask the following questions.

1. When does the item need to reach its destination?
2. What is the address of the delivery point?
3. What are the wishes of the legal practitioner?
4. If appropriate, do you have time to hand deliver the item?

Once you have the answers to these questions you can then determine the most appropriate method of delivery. If you are ever unsure as to the best method of delivery you can ask your supervisor or the legal practitioner for whom the urgent item is being sent.

#### Hand delivery

You may be required to hand deliver an urgent mail item. If you are required to do so then ensure that you clarify where the mail is to be picked up from and when it needs to be delivered. Although you should attempt to deliver the mail to the addressee this is not always possible, **For example**, you may have to leave a mail item with a receptionist. Therefore, it is a good idea to keep a record of what mail you have hand delivered, when it was delivered and to whom it was delivered.

Keeping a record of your deliveries will help you confirm who received the mail and when. Sometimes the information recorded will be used to prepare an Affidavit confirming the delivery of the mail item.

#### Deliver mail

Mail should always be forwarded to the recipient within the organization’s designated time lines so business is conducted effectively. Speak to your supervisor if you ever have any problems with the time lines. Sometimes the problems may be out of your control; for example, if the mail is delivered late. You can distribute mail in various ways. For example, you may place mail for people in a separate folder and deliver it to their in-tray. Some organizations may have an area where employees collect mail and you may be responsible

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for depositing mail in the correct pigeonholes. Large organizations may have mail collection points for each department. Organizations with numerous offices in various locations may have an internal mail system, with specified collection points and pick-up and drop-off times.

**URGENT SAME DAY DELIVERIES**

Businesses have a range of options available. They may use the Post Office’s services – express post/overnight bag or they may have a contract with a courier service/s for urgent delivery of frequently used documents **e.g.** x-rays or solicitor documents. Fast services for time-critical documents cost more than slower services.

**Prepare Parcels**

Consider the following tips when preparing a package to send by courier:

1. Pack the article in a cardboard box of the right size.
2. Line the bottom and sides of the cardboard box with recycled newspaper to give added protection.
3. Pack shredded paper or polystyrene material around, above and below the article to protect it and prevent it from moving about in the box.
4. When the contents are securely packed, seal the box with sticky tape, string or strapping.
5. Reinforce the corners and flaps of cartons with masking tape.
6. Clearly indicate the name and address of the person or company the article is going to, as well as the name and address of the person sending the parcel.
7. Attach appropriate stickers such as Urgent or Fragile to the package.

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<b>Self-Check -2</b>	<b>Written Test</b>
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**Directions:** Answer all the questions that are you are asked below.

- 1- What are the questions that we need to ask ourselves to identify the best method for an urgent delivery? 3 point

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- 2- How to Prepare Parcels? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_



Information Sheet-3	Organizing lodgement or pick up of emergency deliveries and follow-up
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### 3.3- Organizing lodgment or pick up of emergency deliveries and follow-up

Processing in accordance with *organizational requirements* may include:

- addressee/organization
- appropriate carrier (courier, normal mail, express post)
- Date of dispatch
- Receipts attached where appropriate
- Reference number
- Sender
- sender's department

#### Lodgment or pick-up of urgent deliveries

When an item is to be sent urgently, couriers will usually collect the mail item from your organization. The item should be left at reception in a clearly marked envelope.

This arrangement may also be true of DX items. Large organizations may have their DX items picked up from the offices. If you are sending mail urgently by Express Post, the items will have to be taken to a local gold letter box or post office and lodged there.

#### RECORDING OUTGOING MAIL

Most organizations record the items dispatched each day. This procedure makes it quick and easy to follow up mail that was not received or to determine exactly when an item was sent. Many organizations have a separate outgoing mail register where these records are kept. Mail records may be **electronic** and/or **paper based**.

The following shows the different formats in which records can be kept.

Electronic records	Paper-based records
✓ Specialist software	✓ Mail books
✓ Databases	✓ Forms
✓ Spreadsheets	✓ Files

Recording all outgoing items in an **Outgoing Mail Register or Postage Book** is good business practice for the following reasons:

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- It is a checklist to ensure that all outgoing mail has been sent
- It serves as a check if clients later advise they didn't receive a response to an enquiry
- Queries regarding postage dates can be quickly answered
- The method of posting can be identified
- Costs can be checked

It may be procedure in some organizations for staff to make duplicate copies of all outgoing mail, including faxes and email messages for filing as an official record of correspondence.

**The Outgoing Mail Register may include the following details:**

- Date of dispatch
- Sender
- Sender's department
- Name of addressee and organization
- Service (courier, normal mail, Express Post, air mail, etc)
- File reference number
- Receipts attached where appropriate
- Cost of send

An example of an **Outgoing Mail Register** is shown below.

OUTGOING MAIL REGISTER JONES CLEANING SERVICES					
Date	Nature of mail	Sent from/to	File reference number	Method Used	Cost
4 July 18	Quote for services	Jo Brown to Jane Moore	7983BN	Standard Post	\$2.00
7 July 18	Cheque payment for services	Cam Benson	EL7923	Express Post	\$1.50

Some organizations keep a record of the details and cost of all outgoing mail in a Postage Book. The postage book is part of the financial records of an organization, so accuracy in the recording of this book/register is of great importance.

A **Postage Book** is kept on the Impress System; ie a certain amount of stamps used plus the amount of stamps left in the tin should equal the amount of the original impress.

STAMPS USED + STAMPS/MONEY IN TIN = ORIGINAL IMPREST.

An example: \$80.00 is the imprest; halfway through the week we have used \$54.00 worth of stamps; therefore \$26.00 worth of stamps should be left in the tin.



**Self-Check -3**

**Written Test**

**Directions:** Answer all the questions that are you are asked below.

**1-** What it includes the **Outgoing Mail Register?** 3 point

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**2-** Write the different formats in which records can be kept? 3 point

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**Note: Satisfactory rating – 5 and above points**

**Unsatisfactory - below 5 points**

Ask your teacher/trainer for any help if you need.

**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_



**List of Reference Materials**

1. BSBINM202 Handle mail (Aspire Training& Consulting)
2. Handling Mail :: 47 Commerce (Business Studies)
3. BSBINM202A HANDLE MAIL( Axum polytechnic college)
4. [www.google.com](http://www.google.com) (books)