BSBINM202
Handle mail
Release 1

Learner guide

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Learner guide

Aspire Version 1.1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBINM202 Handle mail*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Recognises and interprets textual information to complete tasks according to organisational requirements
Writing	• Records simple and routine information using an established format and workplace-specific vocabulary
Oral communication	• Uses questions to clarify and confirm instructions, listens to directions and clearly articulates requirements
Numeracy	• Recognises basic mathematical data to verify weight, addresses and registered numbers • Performs basic calculations needed to estimate time for a variety of mail despatches
Navigate the world of work	• Recognises organisational expectations and follows explicit protocols, policies and procedures
Interact with others	• Identifies and responds effectively to information associated with job role using appropriate language • Follows accepted communication practices and protocols in performance of tasks
Get the work done	• Follows clear instructions within defined level of responsibility • Makes low-impact decisions around clearly defined tasks • Responds to predictable routine problems and implements standard procedures or logical solutions • Uses organisational systems to enter and retrieve data

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome		Rate your confidence in each section
Topic 1: Receive and distribute incoming mail	1A	Check and register incoming mail	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Identify titles and locations of company personnel and departments	❑ Confident ❑ Basic understanding ❑ Not confident
	1C	Identify and distribute urgent and confidential mail	❑ Confident ❑ Basic understanding ❑ Not confident
	1D	Sort and deliver mail to the right person and location	❑ Confident ❑ Basic understanding ❑ Not confident
	1E	Record, report and deal with damaged, suspicious or missing items	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Collect and dispatch outgoing mail	2A	Collect, check and sort outgoing mail	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Process and record outgoing mail	❑ Confident ❑ Basic understanding ❑ Not confident
	2C	Dispatch mail within time lines	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Organise urgent and same day deliveries	3A	Evaluate and select the best delivery option/s	❑ Confident ❑ Basic understanding ❑ Not confident
	3B	Organise urgent deliveries	❑ Confident ❑ Basic understanding ❑ Not confident
	3C	Lodge and follow up emergency deliveries	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Receive and distribute incoming mail

Businesses receive mail in all shapes and sizes from various sources. Incoming and outgoing mail can be both paper-based and electronic. Different organisations collect and process mail in different ways. Large organisations may have mail delivered to a central mailroom. In a small organisation, mail may be collected from a post-office box. Organisations may also have specific procedures in place for accessing electronic mail such as emails and faxes.

Some mail must be processed in a particular way; for example, if it is marked as urgent or confidential. You may also receive mail that looks suspicious or is damaged and must be handled carefully.

In this topic you will learn how to:

1A   Check and register incoming mail

1B   Identify titles and locations of company personnel and departments

1C   Identify and distribute urgent and confidential mail

1D   Sort and deliver mail to the right person and location

1E   Record, report and deal with damaged, suspicious or missing items

1A Check and register incoming mail

Most organisations receive a large amount of mail every day. After you have been working in an organisation for a while you will become familiar with the types of mail it receives, including:

- general correspondence, such as letters
- accounts
- invoices
- cheques or payment for services
- confidential or personal correspondence
- journals and magazines
- invitations
- legal documentation
- advertising and marketing material
- junk mail
- other correspondence
- electronic mail such as faxes and emails.

Receive incoming mail

The size of an organisation will determine how the mail is received, as shown below.

An organisation may receive mail in one or more of the following ways:

- Mail may be delivered by Australia Post (or another carrier) to the organisation's front door or reception area.
- An employee may be responsible for collecting mail from a post-office box.
- Faxes may be received by one or more fax machines, where they are collected and added to the other mail received.
- Mail delivered by courier may be received throughout the day at the organisation's front door or reception area.
- Emails may be forwarded to other people as required.
- Internal mail (from personnel within the organisation) may be delivered to employees' pigeonholes or in-trays.

Sort incoming mail

Certain types of mail are usually separated from general mail before opening so they can be handled differently.

Other types of mail include:

- mail marked 'Confidential' or 'Personal' on the envelope (on the cover sheet if faxed or in the subject line if emailed)
- mail marked 'urgent' or Express Post
- mail that has been damaged
- mail that looks suspicious
- registered mail
- returned mail
- mail sent to the wrong address.

Registered mail

Registered mail provides an identification number for every article and proof of posting when lodged at a post-office counter. A signature is obtained on delivery and insurance cover is included.

Options for registered post include:

- a delivery confirmation card that is lodged with the registered post item, signed by the recipient and returned to the sender by post
- a person-to-person label so the item is only delivered to the addressee, who is required to provide proof of identity.

Returned mail

You may receive correspondence that has been returned with 'Not at this address' or 'Return to sender' written on it. Returned mail should be given back to the person in your organisation who sent it so they know the mail was returned. They can then redirect the correspondence to the correct address, if appropriate.

Mail sent to the wrong address

Sometimes you may receive items of mail addressed to people who do not work in your organisation. Stamp or write 'Return to sender' or 'Not at this address' on the envelope and send it back with the outgoing mail.

Open, check and prioritise mail

In large organisations, there may be a machine that opens mail for you. Otherwise you can open paper mail cleanly with a letter-opening knife.

Remember, you may also be responsible for opening emails if your organisation has one or more central email addresses. You must know and follow your organisational policies and procedures when handling electronic mail. These procedures indicate what should be done when forwarding email from a central email address; for handling confidential email; and for handling email marked urgent.

After you have opened the mail you should check it, as explained below.

Return address

If the content has no return address, check for a return address on the envelope and attach that to the content; make a note for the recipient if there is no return address.

Enclosures

The content may mention a number of items enclosed; check that the items mentioned have been received and contact the sender if they have not.

Be careful when opening envelopes that you do not rip the enclosures. Make sure you take out all of the contents. Check the enclosures because they may stick together if there is more than one. Handle the mail carefully and make sure all enclosures are attached to the covering letter. If they are not attached, staple them together immediately. If you don't, the letter and its contents may separate.

You may be asked to keep envelopes for a number of days. This is in case you need to provide proof of the posting date, the return address or if an enclosure has been left inside.

Register incoming mail

Keeping a register or record is a critical part of receiving incoming mail. Most organisations have some form of registration to ensure all mail received by the organisation is recorded before it is distributed. A register or record verifies:

- the organisation has received mail items
- who the mail has been distributed to within the organisation.

When recording information about incoming mail you must enter all details correctly. If there is ever uncertainty as to whether correspondence has been received by an organisation, accurate records ensure a quick answer.

The types of information recorded in the mail register vary from organisation to organisation. Sometimes a file number is assigned to each item of mail.

Information in the mail register should include:

- who sent the correspondence
- the date the correspondence was received
- the addressee or who the correspondence was sent to
- contents of the correspondence
- subject of the correspondence
- date of reply
- condition of the correspondence (for example, was it damaged or without a return address?).

Example: incoming mail registration form

Date	Description	Recipient	Attachments	Condition	Action
4/7/15	Letter from lawyer	Mr Brian Cascio	Contract	Good	Deliver
4/7/15	Letter from customer (cheque enclosed)	Ms Gabrielle O'Brien	Cheque	Envelope torn	Bank cheque and issue receipt
4/7/15	*HR Magazine*	Ms T Hale	None	Good	Circulate

Be mindful of privacy

When you are registering mail, you need to record as much as you can without actually reading the correspondence.

When dealing with mail information, you need to be mindful of relevant privacy laws. Refer to your workplace policies and procedures, as they will help you deal with and understand the issues related to confidentiality and privacy in this area. Policies and procedures are designed to reflect legislation relevant to the workplace.

Computerised tracking systems

In some larger organisations, mail is registered using specific computer software. These systems enable all relevant items of mail to be registered and classified for distribution and tracking within the organisation. They provide a system of controlling mail and files linked to the mail, from creation to disposal or archiving.

In some organisations, the person responsible for the mail registry also decides who the mail should be directed to for action. If this is part of your role, you need to be familiar with all key staff and their areas of responsibility. For example, mail that includes invoices or receipts would be registered and distributed to the relevant staff member in the accounts department.

Follow workplace policies, procedures and practices

When handling mail, you need to be sure that you are aware of your role and personal responsibilities, including the limits of your position. Your position description will tell you what your role and responsibilities are, although it may not describe exactly the boundaries of your position. If you are in doubt, consult your supervisor.

You must follow the workplace policies and procedures that apply to your role. There may be particular privacy, confidentiality and ethical requirements associated with opening mail. If there is a code of practice, you must adhere to it.

The policies, procedures and practices inform you of the organisational standards; for example, the type of stationery to use and the expected time lines for responses. Organisational standards also outline the most appropriate language to use, such as how to address clients.

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Follow any federal and state/territory legislation or guidelines that are in place and may affect mail handling. You don't have to know all the details of the legislation, but you do need to know the types of things you must comply with. Your organisation can be held liable for any issues that arise if you have not followed procedures correctly.

Legislation, policies and procedures

Your organisation should have embedded relevant legislation and other practices into their policies and procedures, so if you follow these, then you are complying with the law. However, when you are handling mail, always check to ensure you have considered aspects of legislation relating to handling mail.

Legislation

Legislation or Acts are laws that are made by Parliament. These laws are developed to protect people and to support them to do their work safely and ethically.

- **Anti-discrimination**
  Anti-discrimination is covered by a number of Commonwealth and state and territory Acts. For example, the *Equal Opportunity Act 2010* (Vic.) states that you must treat everyone the same regardless of age, gender or background; therefore everyone's mail must be treated respectfully.

- **Confidentiality**
  Privacy Act 1988 (Cth) states that organisations will have policies and procedures regarding handling mail; using, sharing and storing information. Privacy is also covered by the Privacy Regulations 2013.

Regulations

Regulations set out the mandatory requirements under the legislation or Acts. The information in the regulations makes it easier for employers and employees to understand their obligations.

- **Manual handling**
  Your organisation's health and safety policies and procedures, which are based on the regulations, are to ensure you do not create hazards or cause risk to your health or safety, when handling mail.

- **Safe environment**
  The information outlined in the Model Workplace Health and Safety Regulations support you when handling mail by ensuring the workplace provides a safe environment.

Codes of practice

Codes of practice provide guidance to meet the industry standards.

- **Code of Practice for Manual Handling**
  Ensure you follow safety directions when using equipment. Follow manual-handling guidelines, such as using a trolley to deliver heavy parcels, and notify your supervisor if work demands are causing stress.

- **Code of Practice for Hazardous Manual Tasks**
  You will need to register incoming and outgoing mail including the state of the packaging of parcels to ensure hazardous or suspicious mail is not mishandled.

Practice task 1

Read the case study, then answer the questions that follow.

Case study

Daniel works in the office of a large transport company that receives a lot of mail each day. His duties include sorting and delivering the mail each morning to the organisation's various departments.

One day, Daniel takes a call from the accounts manager who tells him that a cheque is missing that should have been attached to one of the letters received in the day's mail. Daniel doesn't remember seeing the cheque, and tells the manager he doesn't know anything about it.

Daniel's supervisor suggests that he looks in every envelope he opened that morning just to make sure the missing cheque has not been overlooked. Daniel retrieves all the opened envelopes from the paper recycling bin and sorts through them. He finds the missing cheque wedged in an envelope.

1. Describe two things Daniel did that could have caused problems.

2. Why is it important for Daniel to follow any federal and state/territory legislation or guidelines?

1B Identify titles and locations of company personnel and departments

When the mail has been sorted and registered, it can be distributed and/or circulated to the appropriate personnel. To do this, you need to have accurate knowledge of the location of your organisation's personnel and all the relevant departments. You also need to know the correct titles of staff and departments.

Mail may be addressed to a department or to an individual. It is a good idea to have an employee list with the departments, names, titles and locations of all company personnel. This list must be updated regularly. If your organisation does not have an employee list, you may like to prepare one.

Example: employee list

Personnel	Title/position	Department	Location
Mrs Thi Nguyen	Manager	Business support	1st floor
Mr Geoff Lands	Accountant	Business support	1st floor
Ms Annabel Hodges	Personal assistant	Business support	1st floor
Mr George Dimitri	Sales manager	Sales and marketing	2nd floor
Mrs Peta Palma	Sales executive	Sales and marketing	2nd floor
Mrs Alice Worell	Personal assistant	Sales and marketing	2nd floor

Follow set standards

Some organisations set service standards for sorting, registering and distributing mail to ensure time lines are met. For example, each department may expect to receive their mail each day by 10.00 am. Some managers may want you to forward their incoming mail to someone else in the organisation, such as their assistant. Always follow the special conditions and requirements operating in your organisation.

Practice task 2

Read the case study, then answer the questions that follow.

Case study

In Pauline's first week at a small accounting company, she collects, opens and distributes the mail according to a list of company employees she has been given. The first few days are straightforward but on the third day a letter arrives addressed to Mr P Robinson. Pauline recognises the name from her list of employees but has not received any other mail for him and has not met him.

She asks her manager where to find Mr Robinson and is told that he left the company three months ago. His current address is unknown.

1. What does this case study highlight about company information and records?

2. List two actions Pauline should now take.

1C Identify and distribute urgent and confidential mail

Many organisations have procedures to follow when sorting mail. You need to find out what the procedures are in your workplace. If in doubt, ask your supervisor.

Certain types of mail may be separated from general mail before opening so they can be handled differently. These include confidential mail and urgent mail as shown below.

Confidential mail

Mail marked confidential, personal or private should not be opened, unless you are authorised to open it. If you open this mail by mistake, you should quickly re-seal the envelope with tape and write on it 'Opened by mistake' and your initials. It is not possible to do this for faxes and emails.

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.

Urgent mail

Some mail is marked urgent. If it is also marked confidential or personal, you should treat it as confidential first and not open it. 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 prioritising mail for that person.

Another form of urgent mail is Express Post. The sender pays extra postage for an item to be priority processed for prompt delivery, usually the next working day.

An organisation may have specific procedures in place for sorting and distributing urgent mail.

Practice task 3

Read the case study, then answer the questions that follow.

Case study

Fiona is called in for one week's work in the mail department of a large clothing manufacturer. On her first day she registers and sorts the mail in the incoming mailbox as soon as she arrives at work. Then she continues with other duties. After lunch, she receives emails from three company employees who are expecting Express Post invitations to an important function, but have not received them. Fiona knows that she cleared the box, but decides to check the incoming mailbox again. She discovers the three Express Post letters there, along with the rest of that day's mail.

Fiona learns that the mail she had sorted earlier that morning was actually left over from the previous week. She had not followed the company's policy to check incoming mail again before lunch.

... continued

1. How could Fiona find out about her company's procedures?

2. What should Fiona do with the Express Post letters?

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1D   Sort and deliver mail to the right person and location

When the mail has been opened, you need to sort, prioritise and deliver it to the nominated person. The nominated person may be an administrative support person, a particular department or an individual addressee.

The organisation may have set procedures for sorting and prioritising mail. An example of the way you may be asked to sort the mail is shown below.

Separating urgent mail to be distributed first

Sorting by department

Sorting by location

Sorting by seniority of personnel

Separating internal organisational mail and external mail

Sorting by order of importance for each individual

Separating junk mail

Sorting invoices, accounts and cheques

Adding circulation slips to the mail
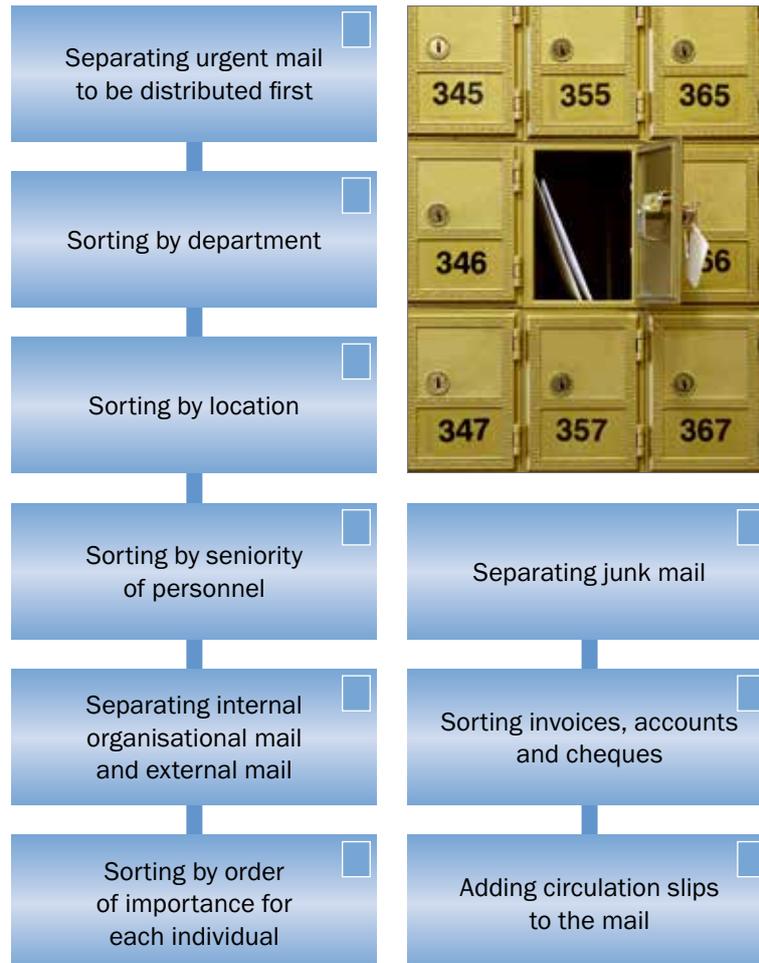
Circulate mail

Some mail may need to be circulated to all (or a particular group of) staff. For example, you may receive magazines that are circulated to each member of a certain department each month.

You may need to attach a circulation slip to the front of the material. This slip has a list of the people who should receive the item. The recipients can then tick their name off when they have viewed the contents and pass the material on to the next person on the list.

Example: circulation slip

Circulation slip			
Priority	**Name**	**Date received**	**Date passed on**
			Date returned:

To speed up circulation, please:

- read, review or photocopy the attached material ASAP
- circulate to your team when appropriate
- pass on to the next listed person.

Return to:

Deliver mail

Mail should always be forwarded to the recipient within the organisation'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 organisations may have an area where employees collect mail and you may be responsible for depositing mail in the correct pigeonholes.

Large organisations may have mail collection points for each department. Organisations with numerous offices in various locations may have an internal mail system, with specified collection points and pick-up and drop-off times.

There may be a number of different internal distribution systems operating at the same time.

Practice task 4

1. Read this list of incoming mail and sort the items into a possible priority order. Number the items from 1 (most urgent) to 16 (least urgent).

Priority	Item
	Newspapers
	Electronic mail
	Business letters addressed to specific people
	Urgent mail
	Private and confidential mail
	Express mail
	Couriered mail
	Letters addressed to the organisation
	Cheques
	Advertising flyers
	Parcels
	Accounts for payment
	Magazines
	Ordinary mail
	Junk mail
	Personal mail

2. Explain why you need to have a system to handle the sorting and prioritising of incoming mail.

1E | Record, report and deal with damaged, suspicious or missing items

If you are responsible for receiving and distributing incoming mail, you need to know how to deal with, record and report damaged mail, suspicious mail or missing items. Some of the issues you may have to deal with when managing mail are shown below.

Damaged mail

Some mail may arrive damaged. Mail can be damaged in transit in various ways including:

- exposure to the weather – rain can cause water damage, which may cause printed text to run and contents to swell and spoil
- rough handling – address labels may be torn or contents broken
- theft or pilfering – parcels arrive cut open, with some or all of the contents missing.

If mail arrives damaged, you need to establish or follow company procedures that may require you to:

- contact the sender to ensure that everything sent was received
- negotiate replacement of missing or damaged items with the sender
- fill out forms for the sender's insurance company.

If you are using a letter opener, it is possible that you may accidentally damage a letter. If this happens, you should repair the letter, mark it 'Accidentally damaged' and initial and date it.

Suspicious mail

Some organisations receive suspicious mail from time to time. Your workplace will have policies and procedures to follow for dealing with suspicious mail. For example, you may deal with suspicious mail if you work for a politician, a political or religious organisation, an embassy or consulate. You must know how to handle it appropriately.

Suspicious mail is any mail that looks unusual, makes noises or smells strange. Mail that has been re-sealed and looks as if it has been opened or interfered with should also be treated as suspicious.

If you receive mail that looks suspicious, do not touch or move the item. Call your supervisor or your organisation's security staff immediately so they can deal with it.

If your organisation has a lot of staff or has concerns regarding security issues, it may have an X-ray machine to check the safety of incoming mail. In this case, you will be required to follow specific procedures and will be given training.

Missing items

Make sure you keep the contents of each envelope together in the form and sequence they arrived in. Missing items may be noted by the employee opening the mail or by the recipient. In either case, the item should be checked for damage or interference and the sender contacted immediately as you may need to negotiate replacement of the missing item with them. A note of missing items and/or damage should be made in the incoming mail register along with follow-up action required or taken.

If mail has the letters 'USC' printed on it (which means under separate cover), make a note in your diary to check that the expected material arrives within a few days.

Practice task 5

Read the case study, then answer the questions that follow.

Case study

Adrian works on reception for a large organisation. One day he receives a parcel from Sweet Thing Chocolate Company that was ordered. The string around the parcel is broken, there is a slit in the cardboard box, and it is almost empty with only a few chocolates at the bottom.

1. List the steps Adrian should take before delivering the parcel to the recipient/s.

2. Where and how should he record the steps he took?

Summary

1. Organisations receive various types of mail from a range of sources.

2. Each organisation has its own requirements for receiving, documenting and distributing mail. You need to know your organisation's policies, procedures and requirements.

3. Different types of mail must be processed in particular ways. Be sure you know how to deal with urgent, suspicious, damaged and confidential mail.

4. Efficient distribution of mail requires knowledge of company personnel, departments and locations.

5. Accurate and current record keeping is an important component of handling mail. You may need to refer to your records if a dispute over correspondence arises.

Learning checkpoint 1
Receive and distribute incoming mail

This learning checkpoint allows you to review your skills and knowledge in receiving and distributing incoming mail.

Part A

1. Explain why handling mail is an important responsibility in an organisation. Describe what may happen if mail is handled in a careless manner.

2. Explain why is it important to follow workplace policies and procedures, or comply with legal requirements when carrying out your tasks.

3. Write an outline of the steps and processes involved in handling incoming mail in your organisation or an organisation you have researched. Include the procedures for:

    - checking

    - sorting

    - registering

    - distributing.

4. In the following table, explain how you would handle the 10 mail items:

Item	Procedure
An urgent letter for the manager	
A letter with an order attached	
A letter with a cheque attached	
A parcel that has been squashed and torn	
A letter that says there is a cheque attached but there is no cheque in the envelope	
A letter that says returned goods have been sent under separate cover	
Two letters addressed to the organisation	
A letter addressed to the marketing manager	
A letter addressed to the sales manager marked 'Confidential'	
A parcel with a strong chemical smell	

Part B

Read the scenario, then answer the question that follows.

<table>
<tr><td>Scenario</td></tr>
<tr><td>

You work as an administrative assistant to Sally Smile, the human resources manager at an architecture organisation. The human resources department is responsible for areas such as training and development, work health and safety and payroll. As Sally's assistant, you often have contact with people in other departments.

After collecting and sorting the mail, you have the following 11 items addressed to Sally:

- a flyer advertising the local lunch bar
- an envelope for Sally Smile, HR Manager, marked 'Confidential'
- HR Weekly magazine
- a letter from the bank marked 'Urgent'
- a fax from the HR department at your interstate branch
- a letter that appears to have been opened
- internal mail from the accounts department
- an airmail letter that looks like personal mail
- an Express Post letter
- a cheque for $650 for payment of an account
- an airmail letter from an architect's firm in England.

</td></tr>
</table>

In the following table, register all mail items in order of priority, where (1) is most urgent and (11) is least urgent, and complete the following details:

Date	Description	Recipient	Attachments	Condition	Action to be taken

continued ...

Part B

... continued

Date	Description	Recipient	Attachments	Condition	Action to be taken

Part C

Read the scenario, then answer the question that follows.

Scenario
You have received an electronics magazine from the manager. She wants you to circulate it today. The circulation list is for Moana Poata, Sam Jones, Nicki Papadopoulos and Cindy Chan. Nicki is going on holiday in two days' time and Sam is away until the end of the month.

Prepare the circulation list below.

Circulation slip			
Priority	**Name**	**Date received**	**Date passed on**
			Date returned:

To speed up circulation, please:

- read, review or photocopy the attached material ASAP
- circulate to your team when appropriate
- pass on to the next listed person.

Return to:

Topic 2
Collect and dispatch outgoing mail

There are a number of procedures to follow before outgoing mail is ready to be dispatched. To dispatch mail means to send it to its intended destination. You may first have to collect mail from individuals or departments or it may be delivered to you.

Mail can be sent in many different ways, through numerous carriers. You need to become familiar with the various services available and the methods preferred by the organisation in which you work.

You may need to investigate postal charges for different weights and to different regions. Items may require overnight, express or person-to-person delivery. You may need to find out bulk mail costs. Special security arrangements may be required for important documents. The carrier or the recipient may require specific delivery instructions.

Most organisations have a cut-off time each day when the mail is taken to the post office. You will have to plan your day to make sure you have enough time to process all the day's mail.

In this topic you will learn how to:

2A Collect, check and sort outgoing mail

2B Process and record outgoing mail

2C Dispatch mail within time lines

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2A Collect, check and sort outgoing mail

Mail for dispatch can be collected in a number of ways. Large organisations may have an area in each department where items are deposited, then collected periodically and taken to a central mailroom for processing. Small organisations may have central mail trays where employees place mail to be processed. You may be responsible for collecting mail from individuals or they may forward it directly to you.

Make sure you understand the procedures you have to follow for collecting outgoing mail, especially the organisation's time frame for collection. For example, if Australia Post collects mail from your organisation at 4.00 pm each day, make sure you have collected everyone's outgoing mail by no later than 3.30 pm. Then you will have enough time to check that everything has been addressed correctly and to sort the mail according to the delivery requirements.

Your workplace policies and procedures will guide you on the best way to perform these tasks.

Check mail before dispatch

Before mail items leave an organisation, they should be checked to ensure they are ready for dispatch. Preparation will vary depending on the carrier you are using and their requirements. You can use guides such as the Australia Post 'Post Charges' booklet to help you prepare mail items correctly.

After you have collected the outgoing mail, check that:

- envelopes have been addressed
- the name and address of addressee are legible
- the address includes the postcode (and that the postcode is not obscured if in a window envelope)
- a return address is included
- envelopes are securely closed
- nothing is protruding from an envelope.

Additional mail checks before dispatch

In addition, if the letter is not sealed, you could also check that:

- all enclosures mentioned are included with the correspondence
- any letters have been signed (if appropriate)
- the letter and the envelope are addressed to the same person.

If you see an envelope that you think is addressed incorrectly or has insufficient information, return it to the appropriate person for correction. Or find out the correct details and arrange for another envelope or label to be produced. Being able to associate different postcodes with Australian states/territories and even regions will help you to ensure postal items reach their destination.

Address letters

In most instances, the sender will complete the address details not the person dispatching the mail. Setting out addresses correctly ensures the mail is delivered to the right person as quickly as possible. All letters must include a four digit postcode as part of the address details. Each postcode relates to a small area (or sometimes a specific business, government department or institution if they receive a lot of mail, although this is becoming less frequent). Addresses ensure mail is sorted efficiently and accurately by letter sorting equipment.

When writing an address, check all the details are correct, including the:

- name and title of the recipient
- name of the organisation
- street number and name or post office box number
- name of the town or suburb
- name of the state or territory
- postcode
- country (if appropriate).

Tips for addressing letters

Here are some tips you can use when you are addressing mail.

Tips for addressing letters
• Use the correct layout and format. Do not use italic, script, compressed or underlined text.
• Align each line to the left.
• Proofread the information on the envelopes before you send them to ensure all names are spelled correctly and all details are accurate.
• Preferably leave two spaces between different address attributes; for example, between the floor number of the organisation and the street address.
• The last line of the address should be in capital letters with no underlining or punctuation.
• Include the state abbreviation on the last line of the address directly after the place name and separated from it by no more than two spaces.
• Include the postcode on the last line of the address directly after the state abbreviation and separated from it by no more than two spaces.
• Do not obscure the address. When using window envelopes, make sure the contents cannot slip and obscure the address.
• Make sure the return address is included either on the top left-hand corner or on the back of the envelope.
• When posting items overseas, include the country of destination in capital letters as the last line of the address.

Australian postcode system

The Australian postcode system is a four digit code and is used for sorting purposes. Postcodes relate to specific areas within Australia. Sometimes the postcode can be for one town/city/area in a state or territory, or in some cases the one postcode can relate to a number of towns/areas across state/territory borders.

The postcode is written as part of the address when preparing mail to be sent out, which is why it is important to check you have the right postcode. You can check postcodes by accessing the Australia Post website.

There are basically three types of postcodes currently used in Australia (2015). They include:

1. Delivery areas – general addresses

2. Post-office boxes – which are used by many larger organisations as one means for coordinating incoming mail

3. Large volume receivers – for example, magazine companies use these to coordinate large volumes of magazines being mailed to a distributer

To find or check postcodes or for further information, visit the Australia Post website at: www.auspost.com.au/postcode.

Example: envelope zones and address format

Service zone	Postage zone
(advertising, return address etc.)	*(stamps, etc.)*

Address zone

(see sample address format below)

Attn: Ms Rebecca Pressburg

Anarchist Architects Pty Ltd

Level 9 464 St Kilda Road

MELBOURNE VIC 3004

Sort mail for dispatch

It may also be your responsibility to package items for mailing. Here are some tips for packaging items.

Envelopes

Use post office preferred or standard-sized envelopes in white paper where possible. You can obtain a letter gauge from the post office to help you check mail sizes.

Express Post

If you use Australia Post's Express Post envelopes, make sure you sign where indicated and retain the sender's sticker in case the item needs to be followed up.

Parcels

Pack parcels securely to ensure the contents are not disturbed in transit and all addresses and instructions are clearly visible. There are many products available at the post office or your office supplier that can make packing parcels easier.

Putting mail together

If you have a number of items going to the same address, it is usually cheaper to place them in one large envelope and send them together.

Stationery supply

If you take your organisation's mail to the post office yourself, keep a supply of envelopes, post office forms and airmail stickers, etc. at your desk to save time at the post office.

Decide on the carrier

There are many mail services that organisations can use to send their outgoing mail. These include Australia Post, as well as other courier and mail companies. The service you choose may depend on a number of different things, including:

- an organisation's preferred services
- price
- convenience
- the size and weight of the item you are sending
- nature of the contents; for example, fragile or confidential
- the urgency of the item for dispatch
- whether or not you require evidence the item has been received
- the geographical destination of the item
- the number of items to be dispatched.

Make sure you sort mail items correctly according to the appropriate carrier or mail service. You also need to know what each carrier requires regarding addressing, packaging and dispatch times.

Keep in mind that new services and carriers are joining the market all the time. Keep up to date with the carriers preferred by your organisation, the choice of carriers available and the services they offer.

Australia Post

Some of the services and products offered by Australia Post are shown below.

Express Post

Guarantees next business day delivery.

Registered Post

Allows for proof of posting when lodged at the post office and a signature is obtained on delivery.

Letter Post

Charges for different weights to different destinations.

Postpak

Has protective packaging to ensure goods arrive safely.

Parcel Post

Has various charges for different weights to different destinations.

Reply Paid

Used to generate sales, encourage prompt payment, build databases and collect information.

Other postal services

There are a number of alternative postal services operating in Australia. For example, many legal firms and government agencies use a service called DX Mail to deliver and receive their mail. DX Mail has mailboxes (or document exchanges) located all over Australia. DX Mail members receive a DX (Document Exchange) address and a mailbox where they deposit and collect mail. Mail can only be exchanged between organisations that are members of the DX Mail service.

There are also private companies that offer mailboxes to rent where you can collect mail, just as you do at the post office. You can find these services in your telephone directory.

Always check with your supervisor or in your organisation's policies and procedures manual to find out whether your organisation has preferred carriers or special situations where certain carriers are used.

When sorting the mail, make sure you place all standard Australia Post items together and take care that no mail for DX, courier, hand delivery or other delivery service is included by mistake.

Prepare and collate bulk mail-outs

Some organisations conduct bulk mail-outs where large quantities of mail are sent out at the same time. For example, this may be to advertise a special offer or a sale, to promote a new product or service or to conduct a survey. In some organisations, multiple mail items are sent out every day.

Inserts in bulk mail-outs can include covering letters, brochures, flyers and order forms. Inserts may be described as contents. The number and types of inserts will affect the time it takes you to prepare the mail items and the amount it costs to send them. To help organise and prepare a bulk mail-out, you need to be very well organised as shown below.

Prepare bulk mail-outs

It may be your responsibility to ensure you have organised all the materials and staff you need for a bulk mail-out. You may need to consider:

- the time it will take you to perform the task

- if you need someone to assist you and, if so, for how long

- the resources required such as:

  – a photocopier and photocopying paper

  – bulldog and paper clips

  – staples and staplers

  – brochures, pamphlets or other inserts

  – envelopes

  – address labels.

Make sure you have sufficient quantities of each item. You may need to reorganise your daily work plan to ensure the bulk mail is dispatched efficiently and reaches its destination on time and in good order. Seek assistance or let your supervisor know if there are any problems.

Collate bulk mail-outs

Bulk mail must be collated in certain ways before it will be accepted (and charged at the cheaper bulk mail rate) by the postal service. Bulk mail items can be collated by:

- size of envelope

- postcode

- weight

- urgency of delivery (off-peak rates are cheaper but take longer).

You need to clarify with the service provider (Australia Post, courier service, etc.) how they require the items to be sorted and batched to meet their specific requirements. For example, Australia Post may require envelopes to be sorted into batches of 50 in groups of specific postcodes and secured with an elastic band. Interstate bulk mail deliveries via DX must be placed in special DX satchels. If your company wants to use Australia Post's PreSort Letters Service, minimum numbers of letters or parcels apply and your organisation must contact and register with Australia Post first.

Make sure you have the correct number of items in the batch before sending. If there are too many or too few it could slow down the sending process.

Practice task 6

1. List at least four things you should check on outgoing mail.

2. What is the first number for postcodes in Victoria, Australia?

2B | Process and record outgoing mail

Processing outgoing mail involves calculating and paying for postage and registering mail. The size of your organisation will determine how postage is paid. In a small business, you may be responsible for buying a range of stamps at the post office and attaching them to the mail items yourself. Alternatively, you may purchase pre-paid envelopes.

Some businesses have an account at their local post office. If this is the case, you usually have to fill out a form listing the items for dispatch and calculating the cost of postage. The amount is then billed monthly to your business.

In some larger organisations, there is a franking machine or postage meter in the mailroom that prints the postage directly onto the envelope or onto adhesive strips that can be stuck on parcels.

Postal charges

Whatever system you use, you must be familiar with the postal charges for different items. Charges will also differ between carriers. The correct postal charges for mail items can be found in the information booklets and directories produced by the carrier you use; for example, the Australia Post Post Charges booklet or the DX Mail DX Directory. You can also find up-to-date charges on the relevant company's website.

Australia Post issues a listing of the cost of non-standard postal items. Collect one from the post office to save delays in the delivery of items that have incorrect postage.

The amount charged to post the item will vary according to:

* size
* weight
* destination
* business discounts
* required delivery time.

Registered mail

You may need to send an item by registered mail. Generally, registered post is used for items of value and when you need to be sure the item has been delivered. These items may include:

* cheques over $5,000
* legal documents
* security parcels.

A card is attached to the item, which the receiver must sign. Australia Post then returns the signed card to the sender to confirm the item has been received. There is an additional charge for this service that can also include insuring the item. The person sending the item needs to complete a registered mail form and lodge it with the item at the post office.

Your supervisor will usually tell you if an item needs to be sent by registered post.

Bulk postage

If you are dispatching more than 50 letters at the same time, you can use Australia Post's bulk postage service. You then take the mail to the post office where the envelopes are post-stamped, and you pay postage at a reduced rate.

To use this service, you have to:

- include more than 50 items
- make sure the items are all the same size
- make sure the items are all facing the same way.

Mail handling centres

Sometimes an organisation outsources a large mail-out and uses a private company to handle the mailing of multiple items. There are many private companies that offer competitive prices for mailing a large quantity of items. This saves the organisation a lot of time and labour. Mail handling or management centres can be found in the Yellow Pages® or your local telephone directory.

If you use such a service, you would supply the mail handling centre with the addresses (usually via email with an attached electronic file such as a spreadsheet or database), envelopes bearing the organisation's logo, and all the inserts such as brochures, prepaid envelopes and flyers. The mail handling service prints the labels, folds the inserts, places them in the envelopes and posts the items for you.

The prices that mail handling centres charge will vary according to:

- the number of items handled
- the number of inserts included in the content
- the destination.

Use and manage email

Email can be used to transmit information on behalf of your organisation, either as mass mail-outs or targeted messages. Just like other mail it must be managed and sent on time. People rely on you to send items within the time lines they have specified. Some email software allows you to prepare messages in advance and specify the time when you want the message sent. When preparing replies to messages find out when the information is required, and plan your tasks accordingly.

Occasionally you may be required to email to a group of people at the same time. Distribution lists are groups or lists of email addresses stored in one place. They make group emailing easy as you can send the same message to a group of people simultaneously with the click of a few buttons.

To make it easy to send emails, you should prepare and maintain distribution lists. These may be prepared using word processing tables or data files, database or spreadsheet records or electronic address books. Follow your organisation's requirements.

Record outgoing mail

Most organisations 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 organisations 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

- Specialist software
- Databases
- Spreadsheets

Paper-based records

- Mail books
- Forms
- Files

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 organisation
- type of service used; for example, Express Post
- reference number; for example, Australia Post prepaid Express Post envelopes contain a barcoded 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.

Example: outgoing mail register

Outgoing mail register			
Date	**Addressee**	**Mail article/reference**	**Cost**
8/5/15	Mr Neville Dody, Cheepire, QLD	Express Post B4 envelope	$7.20
8/5/15	Ms Chiquita Banana, Alaska, USA	Airmail letter, invoice: 3324	$2.75

Practice task 7

Read the case study, then answer the questions that follow.

Case study

Mohan works in the mail department of a large freight company. On Thursday 16 July he sends off the mail, using Registered Post for several letters that contain cheques. Three days later, he is telephoned by a client saying that the mail containing a cheque for $10,600 has not arrived.

Mohan panics. He checks the outgoing mail register to confirm that the letter had been dispatched on 16 July. He telephones the post office where he registered the mail. He is told the letter was sent a day late because the handwritten address was difficult to read and there was no postcode on the envelope. Mohan telephones the client to say the cheque is definitely on its way. Mohan is relieved to hear from the client that the letter has finally arrived.

1. What information would Mohan find on the outgoing mail register? List at least three pieces of information.

2. What two things should Mohan check more carefully in the future?

2C Dispatch mail within time lines

Once you have checked all mail items have been correctly processed, they are ready to send. In some organisations, you will have to take the mail to the post office. In other organisations, 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 organisation 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

Familiarise yourself with the length of time it takes to send different sorts of items.

Choose a mail service

Choose the appropriate mailing service to get the item to the addressee on time.

Follow policies and procedures

Refer to your organisation's policies and procedures or check with your supervisor if you are not sure which service to use.

Communicate mail collection times

Make sure all relevant personnel know the time mail is collected for processing for dispatch.

Avoid the end of the day

Try not to leave all mail processing until the end of the day.

Know deadlines

Familiarise yourself with the various deadlines or cut-off times for posting certain items; for example, some Express Post items must be deposited by 6.00 pm for next-day delivery.

Check/track delivery

Some mail items may not arrive on time, or at all. Some postal services, such as Australia Post's Express Post service, offer free replacement envelopes for items that don't arrive on time. Other services, such as Registered Post, offer a tracing service for missing items.

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Practice task 8

Read the case study, then answer the question that follows.

Case study

Deirdre works for a small legal firm. She is responsible for all the mail going in and out of the office. Due to the importance of some legal documents, she takes a lot of care to dispatch mail on time.

One Friday afternoon, Deirdre receives a call from a senior law partner who says he received an urgent telephone call from a client who complained that documents that should have been delivered that morning had not arrived. Deirdre is positive the documents were sent, but she can't remember what carrier they were sent with, or at what time.

What information should Deirdre familiarise herself with to ensure mail is dispatched on time?
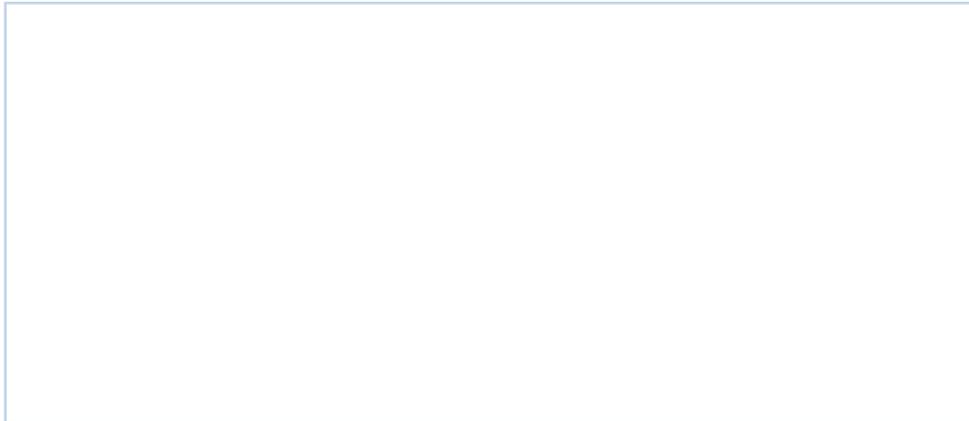
Summary

1. Organisations have their own procedures for collecting outgoing mail. Mail may be placed in central mailing trays, a designated mail collection area or someone may be responsible for collecting mail from staff members.

2. Mail must be checked to see that it is addressed correctly, letters are signed (if appropriate) and the most appropriate packaging is used.

3. The most appropriate delivery option depends on the package's size, cost, urgency, destination and whether evidence of receipt is required.

4. Bulk mail-outs require planning to ensure items have the correct inserts, are addressed correctly and clearly, have the correct postage and are dispatched on time.

5. Postal charges vary according to the type of mail being dispatched.

6. Mail is registered if it contains items of value or if you need to be sure it has been delivered.

7. All outgoing mail must be recorded so it is quick and easy to follow up when mail is not received or to determine exactly when an item was sent.

8. Mail must always be dispatched within required time lines.

Learning checkpoint 2
Collect and dispatch outgoing mail

This learning checkpoint allows you to review your skills and knowledge in collecting and dispatching outgoing mail.

Part A

1. Explain why it is important to understand the services offered by Australia Post and other delivery companies.

2. Explain why you need to know the sizes of letters for mailing.

3. Read the following list of items for dispatch and suggest the most appropriate delivery option for each one:

    a) 300 presentation folders for an information session to be held interstate

    b) A cheque for a substantial amount

    c) A large parcel

    d) Legal documents

    e) A report that must be received the following day

4. Write a paragraph explaining why it is essential for all outgoing mail to be recorded.

5. Write a brief paragraph for each of the following tasks. Explain the steps you should take to complete each one.

    a) Check items for dispatch

    b) Weigh and categorise items

    c) Calculate correct postage

d) Select an appropriate delivery method

e) Arrange delivery within time lines

6. Briefly explain how you can send an email to a group of people at the same time. List three advantages of distributing information this way.

Part B

Complete an outgoing mail register, similar to the table that follows. Record the following items.

Standard letters to:

- The Manager, Elite Stationers, PO Box 32, Frankston VIC 3199
- Accounts Department, Text Wholesalers, PO Box 231, Melbourne VIC 3000
- Mr Magnus, Supreme Computers, 72 Gertrude Street, Fitzroy VIC 3065
- Ms J Stefanova, 156 Sturt Street, Adelaide SA 5000
- Mr S Foster, 89 Bass Road, Shenton Park WA 6008

A parcel weighing three kilograms with dimensions of 30 cm X 40 cm X 30 cm to:

- Engineering Department, Barsden Training College, PO Box 30, Sale VIC 3850

An overseas airmail letter to:

- Mr N Blair, 3241 Riverside Drive, Bay Harbour, Miami, FL 33154 USA

Express Post document envelopes to:

- Ms Adams, 29 Acton Avenue, Melbourne VIC 3000

- The Manager, Anderson & Co, 453 Nicholson Road, Frankston VIC 3199

Calculate the cost of the items from Australia Post's 'Post Charges' booklet.

Outgoing mail register			
Date	Addressee	Mail article/reference	Cost

... continued

Date	Addressee	Mail article/reference	Cost

Part C

1. Explain why it is important for mail to be dispatched within certain time frames.

2. What important information do you need to ensure mail can be sent via express post to reach the addressee by the next business day?

Topic 3
Organise urgent and same day deliveries

Sometimes there are important decisions that need to be made about how to deliver particular items, such as when you need to organise urgent or same day deliveries. For example, you may be given a document that needs to be on a client's desk on the other side of town within the hour, and you need to work out how to achieve this.

It may be your responsibility to evaluate the available delivery options and select the one that achieves the best outcome. You should be familiar with the range of choices available when it comes to selecting alternative delivery methods for your documents and parcels.

After you have selected the most appropriate carrier service, the item then needs to be prepared for urgent delivery and you may need to follow up to ensure it has been safely delivered to its destination.

In this topic you will learn how to:

3A   Evaluate and select the best delivery option/s

3B   Organise urgent deliveries

3C   Lodge and follow up emergency deliveries

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3A | Evaluate and select the best delivery option/s

If it is part of your role to arrange for the urgent delivery of a particular item or to ensure it is delivered on the same day, you may need to determine the most appropriate way to do this. As always, consult your organisation's policies and procedures for guidance and remember if you are still unsure, ask your manager or supervisor.

Select the quickest delivery method

There are a number of delivery services that can be used for urgent and same day deliveries as shown below.

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.

DX mail

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

Transport services

Transport companies offer certain rates for parcel delivery that vary according to the:

- size of the parcel
- destination
- required speed of delivery
- number of items sent at one time
- estimated monthly trading with the transport company.

A large range of transport companies can be found in the telephone directory, although many organisations will have a preferred company.

Hand delivery

There may be some occasions when an item of outgoing mail needs to be hand delivered, especially if it is urgent or confidential. If you are hand delivering an item, try to deliver it directly to the person it is addressed to. If this is not possible, always get the name and position of the person who takes the delivery, plus the date and time of delivery.

Choose the best delivery options

Ask to speak to the person who requires the urgent delivery to see whether they have any suggestions or a preferred delivery method. The 'best' way to send an urgent item should be decided by the sender. For example, do they mean the cheapest, the quickest or the most reliable way?

There are several things to consider when deciding on the best option for an urgent delivery. These are shown here.

Cost; for example, a service may guarantee fast delivery but the cost may exceed your budget.

Time constraints; for example, how urgent is the item and would a courier be quicker than hand delivery or Express Post?

Delivery location; for example, Express Post mail is only guaranteed within a capital city so normal mail may still be as quick.

Nature of contents; for example, you need to check whether the item is bulky, fragile, confidential or a legal document as these may require different services.

Quantity of delivery items; for example, bulk mail sent through Australia Post may be easier and quicker than delivering it yourself.

Practice task 9

Read the case study, then answer the question that follows.

Case study

John works for a medical supplies company that regularly dispatches urgent items around the city and suburbs. On Monday morning, there are three items on John's desk for his attention:

• A package to be delivered before 2.00 pm that day

• A small parcel that is to be delivered locally within 24 hours

• A package marked 'hand delivery'

Identify the best methods for dispatching each of the three items.

3B | Organise urgent deliveries

Before you send urgent mail, you need to understand and apply the appropriate procedures and strategies, and be aware of any relevant organisational policies and procedures.

Mail items for urgent delivery should be prepared as they would be for regular delivery. This means going through the process of checking that the:

- address is correct and legible
- envelope is secure
- item has been weighed and stamped if necessary.

Urgent items need to be handled as a priority and should be sent out immediately. The sender will probably tell you if an item is urgent. Sometimes the word 'Urgent' is written on the envelope. If you are unsure as to how urgent an item is, ask the person who gave it to you.

The way you prepare a document or parcel for urgent dispatch depends on the service or carrier you have elected to use. It also depends on your organisation's policies and procedures.

Complete the paperwork

The carrier you choose may supply the necessary document bags and stickers for different-sized parcels, as well as consignment notes or forms to fill in with the sender and addressee details. They will also provide you with a reference or invoice number so you can keep track of your package.

Dispatched goods may need an invoice attached to the outside of the parcel. Many businesses use transparent stickers designed especially for this purpose. There will usually be a phone number to call before a certain time each day to arrange for items to be collected.

The types of documentation you must complete will vary from carrier to carrier. Some transport companies only require you to fill out one consignment note per parcel, while others may require you to fill out a summary sheet of all the day's items for dispatch. Your organisation may wish to insure dispatched items and you may have to record summary details on an insurance form. The courier company an organisation regularly uses may supply a booklet of dockets to be completed for each item you send.

Prepare items for urgent dispatch

Here are some tips for preparing items for urgent dispatch.

Preparing items for urgent dispatch
Print addresses and names as clearly as possible. Print in capital letters and check that all address details are correct.
Do not use post-office box numbers. Couriers and transport companies cannot deliver items to post- office boxes, as there is no-one to sign for the item when it is delivered.
Make sure all consignment notes, invoices and/or address labels are stuck securely to the document or parcel.
Make sure the address is the same on the item, the invoice and the consignment note.

Record the dispatched items

You must register or make a record of every document or parcel sent by a courier or transport company (similar to the ordinary outgoing mail). There may be a different mail register for urgent items sent with each separate carrier. Always ask the appropriate person if you are unsure how to register these items. Careful registration allows you to track the movements of documents and parcels easily and quickly.

Australia Post's packaging hints brochure contains helpful information about packaging items to ensure your documents and parcels arrive on time and intact.

Occasionally, a document or parcel may go missing. Most carriers have a free tracing service (unless the item was sent more than six months earlier). You need to contact the service and make a request for an item to be traced.

Practice task 10

What should be checked when preparing mail items for urgent delivery?

3C Lodge and follow up emergency deliveries

When you are sending urgent or emergency deliveries, you must make sure the carrier service understands the nature of the delivery and when you need it to be delivered. Your instructions must be clear and accurate.

You also need to be aware of any special requirements the carrier service has to ensure the item is delivered as soon as possible. For example, some carrier services may have a cut-off time for urgent daily delivery or you may need to lodge your request before a particular time of the day.

You should also remember that a carrier may charge extra for any special requirements outside the usual terms and conditions of the organisation's contract with the service. Make sure you are aware of any conditions that may apply. Use your workplace policies and procedures as a guide wherever possible.

Track emergency deliveries

If you are sending an urgent item by courier, the courier company will usually provide you with a reference number in case you need to follow up the delivery. When ordering a courier, you must record:

- the name of the person in your office who is sending the item
- the name and address of the person the courier is delivering to
- any reference numbers.

Most courier companies will provide you with a booklet in which to record this information. If there is ever a dispute about whether or not an item was delivered, you should have a record of all the details.

Follow up a delivery

Occasionally, you may need to contact the recipient of a mail item to confirm if they have received it. The most convenient way to do this is to telephone the person directly for confirmation of receipt. If the recipient has not received the item, you need to lodge a follow-up call with the carrier as soon as possible.

When you contact the carrier, give then any reference numbers associated with the item and ask them for the delivery status of the item. If the carrier indicates that they believe an item has been delivered, ask them to provide you with a proof of delivery. A proof of delivery will show the signature of the person that signed for the item, which you can then forward to the recipient if this is appropriate. You should discuss this first with the sender, as they may wish to handle the situation from there.

Practice task 11

Read the case study, then answer the questions that follow.

Case study

Sarah works for a busy engineering firm whose contracts often need to be sent to the firm's solicitors urgently. At 2.30 pm on Friday she is given a contract in a standard-sized envelope. There is a note attached instructing her to forward the article to Mr Billson at a legal organisation in the city. The contents must be received no later than 3.30 pm that day. Sarah telephones the organisation's preferred courier and books a courier to come immediately. The courier picks up the envelope at 2.45 pm. Sarah doesn't give the courier any specific instructions or record the pick-up in the urgent mail register. At 4.00 pm Mr Billson's personal assistant calls to say that the contract has not arrived. She is very angry.

1. What two things did Sarah forget to do?

2. How could Sarah have handled this situation better?

Summary

1. Delivery options for urgent mail include Express Post, DX Mail, courier and transport companies, and hand delivery.

2. The delivery service chosen depends on cost, time constraints, delivery location, nature of contents and quantity of delivery items.

3. Urgent items must be prepared for dispatch according to the specifications of the delivery service and the organisation's requirements.

4. Items for urgent delivery should be recorded and followed up to confirm arrival.

Learning checkpoint 3
Organise urgent and same day deliveries

This learning checkpoint allows you to review your skills and knowledge in organising urgent and same day deliveries.

Part A

1. Compare the advantages and disadvantages of the urgent delivery services your organisation uses, or an organisation you are familiar with.

2. Read the following list of urgent items for dispatch. Suggest the most appropriate delivery option for each item:

    a) 25 reports for an urgent interstate meeting to be delivered before the office closes in three hours time

    b) An urgent cheque for payment of an invoice

    c) A contract that needs to be signed and returned immediately by a company that is located a few blocks away

    d) A hard copy of a report that needs to be in London as soon as possible

    e) Meeting papers for a manager who is working at home; the meeting is tonight

    f) A large parcel that a staff member has labelled 'Urgent' and 'Confidential'

3. Prepare a checklist for sending an item by courier.

4. What action might you take after the item has been collected by a courier?

5. When might you need to consult records about items that have been couriered?

Part B

Read the scenario, then answer the questions that follow.

Scenario
It is 2.05 pm and you have just been given some financial papers by your supervisor in a standard-sized envelope. The note attached instructs you to forward them to Mr Wayne Shafts at the Department of Immigration in the centre of the city. They must arrive no later than 3.00 pm today.

1. List the steps you would take to make sure the papers are delivered on time.

2. Make a list of the information you require to process the items for dispatch (address, consignment notes, etc.).

Part C

Read the scenario, then answer the questions that follow

You need to send an urgent parcel (weighing 2.4 kg) to Mr Les Stovanish, Express Permit Approval, Town Planning Department, Gold Coast City Council, PO Box 5042, Gold Coast 9726.

The receiving office must sign for the parcel. It must be delivered by 4.30 pm. Your office will pay for the delivery. Your office address is: AB Riches Ltd, 361 Church St Richmond VIC 3141.

1. List the procedure you would follow to dispatch this parcel.

2. Complete a courier consignment note similar to the following.

Courier Service			
Pick up from:		State:	Postcode:
Deliver to:		State:	Postcode:
Reference no:	Description:	Quantity:	Weight:
Special instructions:	Charge sender:		Charge receiver:
Driver's signature:	Sender's signature and date:		Receiver's signature and date: