

M084 Doc 030

Area Intervention Manager Visit Log

Admin duty to complete (except date and length of visit which is completed by AIM)

Date and issue	06-02-06				
Branch	Hightown	Postcode	Wf15 8HU	Fad Code	512323
Details of visit	Horizon problems	Type of visit (ie phone or visit)	visit		
Date of visit	06-02-06	Name AIM	Zoe Riley		
Length of visit	35 mins	Segment	Platinum	Actively Account Managed ? Y/N	N
Hardship Y/N	N	ATM? (note type, eg self fill)	N		

Mandatory requirement on all visits (to be completed by AIM)				
Bal/ Suspense. Check last 2 Branch Trading Statements (record amounts)				
ONCH/FONCH Check declarations (end of day)				
Check sales against holdings				

Optional dependant on visit any breaches should be annotated as to what action has been given

Sales (POM)	
Branch Standards	
Security	
Current issues	

Opening times	
ATM at branch poster displayed	

ACTION (Detail any additional actions to be followed up by Spmr /C&SM/APM/Admin or other)	WHO	DEADLINE DATE	DONE

EXPAND ON ANY LETTER REQUESTED/CLARIFY ANY POINT

Branch had received some TV stamps in the REM which weren't ordered. Pmr tried to put them into REM surplus, but got mixed up, and somehow tripled the amount she was supposed to have.

I went to the office, as the pmr had got very confused, and was unsure what to do next, as she had been give the wrong info from the helpline previously.

I entered £1882 into REM shortage, this gave a figure left in REM shortage as £37.26- I then put £33.26 into REM shortage, this made the REM shortage £4, which it was previously.

I explained that she would carry the £1882 as a surplus until the next branch-trading period, and then if she settled centrally, this would cancel out the shortage she had declared. She would still have the £4, and she needed to deal with this separately.

The pmr was relieved to have got the office sorted, and thanked me for my time.