

## Introduction to Post Office essentials

Post Office Ltd is committed to exploring opportunities to maintain access to products and services by providing an alternative form of convenience outlet. During the past year Post Office Ltd has been trialing a new concept for delivering Post Office services called Post Office essentials.

N..B For the next phase of Post Office® essentials pilots, these will be branded externally as **Post Office® Local**, however there are references to Post Office® essentials in various documents ( e.g. Operating Manuals ). Should we decide to continue with this model after the pilot stage, all references and documents relevant to this model will bear the same name.

The Post Office essentials service is available all the hours that the retail host is open which in most cases is 7 days per week

- The new service offers a wide range of core Post Office products and services, including electronic banking, bill payments and budget payment schemes, Post Office® Card Account withdrawals, Postal Orders and postage, inland letters / packets and parcels (including recorded delivery and special delivery), international letters / packets, or the individual country limit for small packets or printed papers. Customers can also order foreign currency for collection the next day. Services not available via Post Office essentials include: cheques as a method of payment, transcash bills (non automated payments) and Parcelforce Worldwide International items are not accepted.
- Post Office essentials service point is located alongside retail till.
- Post Office essentials branches will **EITHER** be retailer cash funded ( Post Office essentials Version 1) **OR** will receive POL remittances in the normal way ( Post Office essentials Version 2).

Apart from this all the procedures and processes are the same.

Please make sure you read the appropriate **Post Office essentials Operating Manual** EITHER Retailer Cash Version

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OR Post Office Ltd Cash Version. This will give you all the information you may require.

A printed copy of the Operating Manual will be sent to directly to the branch by Elaine Kidd (HR Farnworth) prior to commencement of the training this is the Operator's copy to be left on site.

### FUNDING

Branches will **EITHER** be retailer cash funded **OR** will receive POL remittances in the normal way. TAB 4 on the Vacancy Report under Core and Outreach will tell you what type of branch it is.

#### POL Funded Branches

Cash and stock is received in the normal way.

#### Retailer Cash Funded Branches

##### **Stock**

Stock will be received and returned by Special Delivery, but still needs to be remitted in.

##### **Cash**

The funds required for retailer cash funded branches are provided from the shop till by means of the process in the Operations Manual, using icons 'Loan To PO' and 'Loan from PO'.

**ALL LOANS TO/ FROM PO MUST BE ACCOUNTED FOR  
IMMEDIATELY AND FULLY ON HORIZON WHEN THE CASH IS  
MOVED**

*(Please make sure you read and understand the Handout for  
Inputting and Removing Cash).*

Ensure there is enough money in the Post Office at the start of each day for that day's transactions. Cash needs to be monitored on a daily basis and any surplus cash needs to be banked by the Operator in their nominated bank account as soon as possible. The Post Office will reclaim surplus cash via direct debit 3 days after a surplus has been declared.

During the training support it will be possible to judge how much money is required for each day's trading from the deposits made to the Post Office and the cash declared figure at the end of day.

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*Best Practice* is to keep a float of approximately £3000 in the Post Office to start each day, depending on the transactions in individual offices

### **Insurance cover for cash**

For both Retailer cash funded & POL cash funded branches the Operator is responsible for providing suitable insurance for the maximum amount of cash held at the branch also for providing appropriate security including alarms, safes etc as required by the insurance company.

For **POL cash funded branches only** the Operator can opt to purchase an insurance waiver from POL to cover cash held at the branch rather than arrange for their own insurance policy to include this cover. The waiver covers loss of cash through burglary and robbery only (terms and conditions apply).

### **TRANSACTIONS AND STOCK**

PO essential branches offer limited transactions and stock items. Section 5.6 (Other Pertinent Details) on the Vacancy Report will list any bolt on transactions for that branch. Please be aware that the bolt on transactions will vary from branch to branch. The complete list of transactions and stock held in Post Office essentials is in the Operations Manual. The only Special Stamps that will be received as stock will be the Christmas Issue. The stamps will need to be booked in and sold as ordinary stamps as the Special Stamp "sell" icon is not available.

You will need to be aware that some of these branches may previously have been SPSO's and did a full range of transactions, there will be publicity available to make the public aware of the difference of the new offer. Please read the handout '**Objection Handling**' and leave this with the Agent to cascade to his assistants.

*Pens, Paperclips, staplers, etc are provided by the Operator and are not included in the stores pack.*

### **ASSISTANTS** **Compliance**

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The Operator will be responsible for ensuring all existing and future members of staff serving at the Post Office essentials have completed the **Post Office Foundation** online test along with any current & future compliance tests.

### **Registering**

Please take a set of forms for registering new assistants (P250) to leave with the Operator as an example; stressing that new assistants' should be registered before they work in the Post Office. The Operator should contact the HR centre to obtain up to date forms when required.

### **TRAINING SCHEDULE**

The Operator is to be fully trained on all transactions and products and up to 5 assistants are to be trained on basic transactions and products. The number of agreed assistants to be trained will be detailed on the Vacancy Report. A maximum 6 days on site will be scheduled for 1 Operator and 1 Assistant, 7 days for 1 Operator and 2/3 Assistants, and 8 days for 1 Operator and 4/5 Assistants.

Below is a proforma to schedule on site training time. The FA will be on site for normal core hours (approx 8.30 - 18.00 Monday to Friday and Saturday morning). **The training schedule needs to be discussed and agreed with the Operator during set up,** to plan the training for the period. It will help focus the Operator on when they and their assistants need to be available for training, maximum two people at any one time, and everyone receives training during the allocated time on site.



On site Training  
schedule Jan 2010

If full training for the Operator and all the assistants is completed early, this time can be reduced. Tick lists should be completed for both the Operator and assistants and any training gaps on the assistants tick list will be picked up by the Operator. Tick lists are to be printed from toolkit (EASE: Training - On Site: PO essentials file).

**NOTE:** If the PO Local is located in a **"One Stop"** shop - you should liaise with Rod Hipperson (One

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Stop PO Local coordinator) as part of you preparation for onsite training support.

### **BUY BACK**

Only branches that have the Euro bolt on product are allowed to transact currency buy backs with a Post Office receipt. Euros should be re-sold, other currencies should be returned with the next collection if POL funded. If the branch is retailer cash funded the buy back should be returned when it reaches £2500 in value **or** before the end of the Trading Period.

### **SECURITY**

In all cases ensure Operator and assistants are aware of security requirements for open plan working. Full details are on the Toolkit under Core and Outreach, PO essentials. Ensure a copy of '**Security Requirements for Post Office essentials**' is available and has been read and understood by you and the agent.

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### SET UP DAY/PREP

You will need to print all the relevant materials and handouts from the POe file held on EASE to use on site for training and then leave with the Operator. A easy guide to the use of the materials and can be found by following the Poe2 EASE Guide. You may need to allow extra time for personal development if this is the first PO essential office you are training, so please discuss this with your line manager.

Here are some best practice and tips from the pilot branches:

- Ensure that the Horizon system is in the **correct TP**.
- All PO essential offices are in **GROUP C** for Trading Period dates
- Allow the operator to rem in the stock, then take them through a balance and roll over to the next BP. This will give them extra balancing practice.
- Check that the **Stores Ordering** icon is working, if not phone the helpline.
- During the set up ensure that the Operator and any assistants who will be working in the post office are able to load and unload the safe as this will need to be done before the retail opens or after it closes and you may not be in attendance at those times.
- Enter the Paystation opening times on Horizon.
  - From the **Front Office** screen select:
  - Licences & Government (F5)
  - Compliance (F2)
  - Paystation hours (84)

When entering the hours it is important to remember to "backspace" 00:00 otherwise the system won't let you enter any figures.

### OPERATORS LEARNING ACTION PLAN

This is to provide ongoing focus for the Operator to continue staff training using the tick-lists to identify knowledge gaps. Additionally the Learning Action Plan will serve as a reminder to the Operator to meet POL

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security requirements and maintain a good standard of house keeping. Email an electronic copy to Branch Support Team within 7 days of onsite support completion.

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### FEEDBACK

#### **Level 1 Feedback Form**

The Field Advisor should leave a standard Level 1 form with the Operator.

**MI Data Feedback form:** The Field Advisor should complete one form for the Operator & one form for every 3 Assistants, There is a separate MI Data Feedback form for any Bolt-On transactions and only one of these forms are required per branch to cover both Operator & Assistants. The forms have been designed to be printable & electronic. To add a tick in the boxes on the form electronically set the "Caps Lock" to the "On" position and then press "R".

To enable this feedback to be used by the Post Office essentials team & Network Support PTC process, as a measure of reviewing the effectiveness of the training package please forward the electronic version of the MI Data Feedback Forms (Operators/ Assistants /Bolt-on's-if transacted) **Named as: "MI: (Office Name) : (Office Code) : (Date: dd/mm/yy) : Operators/ Assistants /Bolt-on: For Filing On EFC"** (eg MI: Ellenborough : 123 456: 041009: Operator : For Filing on ECF) and a copy of the Operators Learning Action Plan within 7 days of the completion of the training to:

**BranchSupportTeam:** GRO

PLEASE feed back any other best practice to Rita Kendellen using the form embedded below -it could help your colleagues.  
POe Best Practice will be updated and held on EASE under the PO essentials section.



POe Best Practice  
v1.0