Relocation and Re-Opening of Agency Offices – FSA Guide

The following guide is to be followed when scheduled to attend an Office that is identified on the Training Requirements Form as relocating or re-opening. It is the intention that, by following the guide prior to and during prep day attendance, the opening day will proceed more smoothly.

Contents include:

- Discussion Guide for Pre Prep Day Telephone Call to Property Projects Network Change Manager (NCA) or Field Change Advisor

- Prep Day Activity Ticklist

- Roles and Responsibilities of Property Projects NCA, Field Change Advisor and ,Property Projects, Scheduling Support for information

- Feedback Review Form

Re-opening and Relocation Offices will have a dedicated Property Projects Scheduling Support and NCA. Initial contact with the Property Projects NCA, for a particular Office re-opening will identify whether there are any issues or foreseen problems.

To find out contact details for the appropriate Property Projects Support person (e.g. Network Change Advisor / Scheduling Support) or the Field Change Advisor for a particular Office, please contact Lisa Williams or Fiona Cepek on **GRO** They will provide this information.

Pre Prep Telephone Call to Property Projects Network Change Manager (NCA)

It is suggested that this call is made 3-5 days prior to the prep day

The key call will be to the Network Change Advisor. Introduce yourself explaining your Role. Ask: Is the Office on schedule for re-opening? Have there been any issues I need to be aware of?

In discussing whether the Office is on schedule for re-opening, you may, also wish to cover and confirm that the activities below have been completed, or when they are going to be completed. Note: some of these activities may not be scheduled to take place until nearer the re-opening date.

	Action	Complete	TBC
Is the NCA aware of any issues with the Royal Mail Collections and Deliveries being arranged by the FCA?			
Is there a Post Box?			
What are the Official Opening Times of the Office?			
Have the Horizon Online comms been installed? (ISDN / ADSL / Vsat)			
Has the Horizon Online equipment been installed?			
Is there a datestamp in the Office?			
Were there any issues with the Horizon Online installation? (e.g. Problems with configuration/ any bits of kit requiring replacement			

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Is there any problem or delay with works due to be completed by the Subpostmaster including building works?			
Are there electronic scales and, if yes, are they connected and working.			
Has the Alarm been installed and tested, and the new Postmaster given training and the alarm codes?			
When is Stock and Cash due to be delivered? Day and time.			
Is there an ATM and, if yes, what type			
Is it a Mailwork Office and, if yes, has training been arranged for new Agent? *Mailwork Guide attached to On Line Brief to be used as an aid prior to receiving training*			
Is it a Lottery Office and, if yes, has training been arranged for new Agent?			
Are there any Local Schemes? e.g. SWEB key Charging, Bus Passes.			
Is there a Paypoint or Asylum Seeker machine and have they been connected?			
Have the Stores been delivered? How many boxes?			

Prep Day Ticklist

OFSA to complete the following on Prep Day and resolve any issues

		Complete
Horizon	Agent to Log on to Horizon Online to ensure he has been added as a User and knows his password. This will also act as a check that the system is working ok. Check that the system is in the correct Trading Period. *Any problems with Horizon Online prior to going live refer to NCA or SS. Faults after*	

	opening can only be dealt with by NBSC	
Pinpad	Ensure connected and working – test on Horizon Online	
Printer	Ensure Counter Printer and Back Office Printer work and that there are spare Rolls and Ink for each. Show Postmaster how to change Rolls and Ink pads	
Safe	Confirm with Postmaster the opening/closing times of the Safe. Ensure Postmaster has code and is able to unset/set the safe.	
Stock and Cash	FSA to guide Agent through checking the stock and cash and entering onto Horizon Online. If the Office is an MVL Office ensure an adequate supply of Tax Discs have been received. If delivered on Prep Day the Agent can be shown how to accept a Remittance. Check delivery days for cash and stock. Confirm with Agent when and how to check Planned Orders	
Datestamp	Ensure correct date for opening and sufficient spare ink pads	
Stores	Empty boxes and arrange stores in Office. Agent to be shown by FSA how to order any missing items using Stores Ops Manual. *Any priority items missing from delivery FSA to collect from nearby Office if possible.* Check enough Horizon Online consumables and order form.	
ATM	Ensure instructions for ATM are available. If BOI ATM ensure that Stock Unit is created by Agent for ATM.	

Staff	Confirm how many staff are working in the Office and ensure Agent is aware of need for extra cover during training. *FSA may wish to check this when they make initial contact with the Office prior to Prep Day*	
Opening Launch	Has anything been arranged with Press, etc for an "official" opening and when will it take place? *It is advised in letter received by Agent from Project Support that any official openings are deferred for a week or more following the transfer date*	
Combi/Open Plan/SSOC	Ensure Retention Units are attached for Datestamp and Stamp Portfolio	
Operations Manuals	Confirm necessary manuals available in the Office, or order if required	
Trading Period	Check Trading Period Group for the Office and date that the next Trading statement is due *If calendar has not been received with Stores confirm dates on EASE*	

Property Projects involvement in Branch Change

Property Projects include the Network Change Advisor and Scheduling Support and are responsible for:

Network Change Advisor –

- Overall responsibility for the project being delivered
- The supply and installation of equipment in a branch in relation to: alarms; Horizon Online; safes and scales.
- The order of stores packs.
- The monitoring/management of the physical change activity to completion
- The management of all issues in respect of its suppliers, namely: Romec National Projects Group, Romec Security, Fujitsu Services, Avery, Insafe/Savages whilst the project continues to be live.
- The migration of Horizon Online.
- The supply of a schedule to the sub postmaster detailing the activity they should undertake (including timescales) and Property Projects will undertake (including timescales).

Scheduling Support –

- The migration of Horizon Online (If required).
- The ordering of cash and stock (Re-opening and opening only).

- Book CViT attendance – Delivery / Defund / Refund of cash & stock.
- The ordering of the branch code stamp.
- Requesting Audit attendance – Send E-mail to Outlet Field Support (Relocation with change of Postmaster).
- Completing the multi use form - Send E-mail to HR Agent Recruitment.
- Telephoning the branch on days when activity is taking place to confirm that it is taking place and there aren't any problems.

Note - The project will move to the Business As Usual domain, and therefore Network Business Support Centre/Horizon Online Support Helpline, once the equipment has successfully served the first customer.

- Property Projects **are not** responsible for:

- The sortation/handling of stores packs to the appropriate storage or distribution point or the content of the stores pack. We will however chase missing stores (via Swindon) once advised of such by a trainer opening the stores and telling us if anything is in fact missing/incorrect.
- The summarisation of cash and stock to Horizon Online (we book in the bulk cash and stock only).
- The supply, installation, operation of ATM's
- The format of the branch
- The transactions available on Horizon Online. However if any products were authorised yet missing we will rectify the situation.

Business As Usual Field Change Advisor involvement in Branch Change

The Field Change Advisor is responsible for:

- Making initial contact with branch to discuss project.
- Requesting blueprint validation and migration modelling.
- Visiting branch to discuss project and provide information on: space requirement; DDA compliance; TUPE; format; location; restrictions policy; grant funding; approximate costs; contracts. Encourage open plan format to increase sales and branch viability.
- Seek input from internal stakeholders before authorising change activity.
- Completion of Change Authority Forms and Branch enquiry form.
- Collate information for consultation, compete consultation forms and send to Network Change Team.
- Liaise with Business Development team, Contracts team, external stakeholders, external relations team and National Consultation team throughout project.
- Manage relationship between Agent and Network Change Advisor throughout project.
- Rollover of Horizon Online kit in temp closed branches if required.
- Complete vacancy report when premises are withdrawn.
- Complete Heads of Terms documents when vacancies are advertised "near".
- Meet with external stakeholder's e.g. Parish Councils, District Councils, MP's regarding Network Change projects.
- Manage Greenfield site applications, including survey, report and correspondence.
- Request provision of Posting Boxes and Collections from Royal Mail.

Look for suitable alternative premises and agents for temporary managed branches.

Field Support Advisor

- 3-5 days prior to transfer contacting Project Support to find out status of Office reopening using telephone call list

- Make initial contact with Office to arrange attendance on Prep day

- On Prep Day - Day before official transfer date. FSA to follow tick list for Prep Day. Deal with any outstanding issues by liaising with Project Support

- Opening Day – Business as Usual training new Agent

Review Form

To be completed by FSA

Pre Prep Telephone Call	Comments:
What issues were raised and how were they resolved? Were there any outstanding issues?	
Prep Day Ticklist	**Comments:**
What issues were raised and how were they resolved? Were there any outstanding issues?	
Improvement Suggestions	**Comments:**
Were the Telephone Call and Ticklist useful? Any suggestions for improving the process?	
Stores issues	**Comments:**
Were there any Stores issues?	

Please complete and e-mail the review form to Rita Kendellen

GRO