

## Area Intervention Manager Visit Log

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

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

### Mandatory requirement on all visits (to be completed by AIM)

<b>Bal/ Suspense. Check last 2 Branch Trading Statements (record amounts)</b>				
<b>ONCH/FONCH Check declarations (end of day)</b>				
<b>Check sales against holdings</b>				

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

<b>Sales (POM)</b>	
<b>Branch Standards</b>	
<b>Security</b>	
<b>Current issues</b>	
<b>Opening times</b>	
<b>ATM at branch poster</b>	

C&amp;SM National Standard forms &amp; AIM toolkit October 05 v1.4

<b>displayed</b>	
<b>High risk audit issues</b>	

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

**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.