


[Back to main menu](#)

Operational focus

The operational publication for Post Office® branches

Issue 10

26 May-1 June 2005

in this issue...

		article	page
Operations Manual			
Banking: National Savings/ Bank of England products	NS&I Guaranteed Equity Bond promotional items ~ withdrawn	1	3
	Welsh NS&I brochures ~ distribution	2	3
Bill Payments:			
Automated Payments booklet 1	Automated bill payments ~ process correctly	3	4
Financial Services	Post Office Growth and Equity bonds ~ application and despatch errors	4	4
	Post Office Guaranteed Equity Bond Issue 3 ~ withdrawal	5	5
Government Services:			
Department for Work and Pensions	A & L ID Docket (G6311) ~ distribution	6	6
Government Services: DVLA - UK Photocard Driving Licences	Application Packs (D1 and D1W) ~ last ordering date for current stock	7	7
Horizon System	New Horizon Cash Declaration entry ~ ATM entry	8	7
Post Office procedures:			
Stores Ordering	Brown Cash Account Pouch (P6268/60) ~ annual distribution	9	7
Postal Services: Inland mail services	Exam papers ~ acceptance clarification	10	8
Postal Services:			
Postage and other mail services	Franking Machine resetting ~ withdrawal of service	11	8
Travel Services:			
Bureau de Change on-demand	Internet Orders ~ customer collection errors	12	9
Travel Services: United Kingdom			
Passport Service (UKPS)	Passport applications reversals ~ clarification	13	10
Miscellaneous			
Operational Publications	Operations Manual ~ distribution of revised Automated Payments booklet 2	14	10

No other Operational publication is due with this edition of Operational Focus.

Blank page

1. Banking: National Savings/Bank of England products. All Post Office branches

Contributor: Sam Hardwick

NS&I Guaranteed Equity Bond promotional items ~ withdrawn

In 2005/06, Post Office branches will not receive any promotional items (brochures, leaflets posters etc.) for the National Savings & Investments (NS&I) Guaranteed Equity Bond (GEB).

This decision has been taken to avoid any conflict with the Post Office Guaranteed Equity Bond (GEB).

NS&I will now only offer their GEB to customers directly.

- Please destroy locally, any remaining stocks of the 'Guaranteed Equity Bond: Don't miss out - register now for the next issue' leaflet (X781), which allowed customers to register their interest in NS&I's GEB between issues.

Customer enquiries

- Handle customer enquiries about all savings products, including GEBs, carefully.

Please remember: We cannot recommend savings products, and can only provide information on products advertised or on sale through the Post Office.

- Issue customers with enquiries about the Post Office GEB with our latest brochure.
- Refer customers with enquiries about NS&I GEB to NS&I directly on: **GRO**, or to their website: www.nsandi.com.

2. Banking: National Savings/Bank of England products. All Post Office branches in Wales

Contributor: Sam Hardwick

Welsh NS&I brochures ~ distribution

Welsh versions of the following National Savings & Investments brochures are currently being distributed to all branches in Wales:

Item code	Item description
NS&I 761W0501	Investment Account brochure
NS&I 762W0501	Fixed Interest Savings Certificates brochure
NS&I 763W0501	Index-linked Savings Certificates brochure
NS&I 765W0501	Premium Bonds brochure
NS&I 767W0501	Income Bonds brochure
NS&I 768W0501	Capital Bonds brochure
NS&I 769W0501	Children's Bonus Bonds brochure
NS&I 773W0501	Pensioners Bonds brochure
NS&I 777W0501	Fixed Rate Savings Bonds brochure
NS&I 778W0502	Cash Mini ISA brochure
NS&I 785W0501	Easy Access Savings Account brochure

Sub Post Office branches will receive ten of each brochure, all other branches will receive 20.

- If you have not received your new brochures by Wednesday 1 June 2005, contact the NBSC on **GRO** selecting option 6 for RML Swindon.
- Please display and make the brochures available to customers on receipt.

continued on page 4...

...continued from page 3

Destruction of old brochures

- Only brochures with codes ending 0501 or 0502 must be displayed.
- Please destroy locally, any previous versions of Welsh NS&I brochures held at your branch.

Please note: If a customer present an older version of the application you must still accept it, but you must not ask the customer for identification.

3.

Bill Payments: Automated Payments booklet 1. All Post Office branches

Contributor: Mark Haldane

Automated bill payments ~ process correctly

Some branches are not following the correct procedure when dealing with Automated bill payments schemes.

Latest information shows that an average of 6,000 Littlewoods transactions per month are **incorrectly** processed as Transcash payments.

Other clients whose automated payments are also being incorrectly processed are: Birmingham City Council and Bristol and Wessex Water.

A recent survey conducted by the NBSC highlighted that 58 per cent of staff in branches were not aware of the correct process to follow when dealing with this type of transaction.

- When presented with a bar-coded bill you must follow the procedure for dealing with Automated Payments as detailed in the Operations Manual, Automated Payment Booklet 1, para 4.1 page 8.

4.

Financial Services. All Post Office branches

Contributor: Sam Hardwick

Post Office Growth and Equity bonds ~ application and despatch errors

Over 15 per cent of Post Office Growth Bonds and Guaranteed Equity Bonds (GEBs) applications are received with errors.

These errors cause delays to customers' applications and can lead to the application being cancelled.

- Please make sure you have the latest items on display (Operational Focus issue 1 article 4 refers).

Application errors

The three main application errors are:

Incorrect payee on the customer's cheque

Cheques must be made payable to 'Post Office Savings - A/C (customer name)'.

Cheques **must not** be accepted if the payee is just the customer's name or Post Office Ltd.

Identity recorded for one applicant only

When it is a joint application, two forms of identification **must** be provided and recorded for **each** applicant.

Banker's draft accepted

Banker's drafts are no longer acceptable as payment for GEBs and Growth Bonds (Operational Focus week 45 article 5, and Issue 1, article 3, refer).

Despatch errors

The three main despatch errors are:

Wrong envelope used

- You must use the dedicated Despatch Envelope (PL605) for despatching GEB and Growth Bond applications (Operational Focus week 48, article 2 refers).

Please ensure that you have supplies of this envelope at your branch. If not, order immediately from RML Swindon.

Do not use any other envelope under any circumstances.

No cheque enclosed

- The customer's payment, which must be a personal cheque drawn on a personal bank or building society account, must be included in the despatch envelope with the application forms.

Do not send cheques for GEB or Growth Bond applications to the EDS Processing Centre.

Identity not despatched for a child applicant

- A child applicant's identification document must be despatched with the associated application form and cheque (Operational Focus issue 1, article 3, and the new Growth Bond brochure PL654A5, or PL655W Welsh version refer).

5.

Financial Services. All Post Office branches

Contributor: Olawunmi Babalola

Post Office Guaranteed Equity Bond Issue 3 ~ withdrawal

On Wednesday 1 June 2005, Post Office Guaranteed Equity Bond (GEB) issue 3 will end.

Counter procedure

Withdrawal

- Accept applications for Post Office Guaranteed Equity Bond issue 3 until your final mail collection on Wednesday 1 June 2005.
- Advise customers who try to apply for them after your final mail collection on Wednesday 1 June that the issue 3 has now been withdrawn. **Do not** accept the application under any circumstances.

Despatch

- Despatch Post Office Guaranteed Equity Bond issue 3 applications in the blue dedicated GEB & Growth Bond despatch envelope (PL605) with your final mail collection on Wednesday 1 June 2005. **Do not** keep them for despatch the next day.

Please note: Any applications for Post Office Guaranteed Equity Bond issue 3 that arrive at the Bank of Ireland after Thursday 2 June will be rejected and returned to the customer.

continued on page 6..

...continued from page 5

Destruction of items

- At the close of business on Wednesday 1 June 2005, please destroy the following items locally:

Item code	Description	Type of branch
PL687	Guaranteed Equity Bond Brochure	All branches
PL688W	Guaranteed Equity Bond Brochure - Welsh	Branches in Wales

6.

Government Services: Department for Work and Pensions. All Post Office branches

Contributor: Craig Skinner

A & L ID Docket (G6311) ~ distribution

When despatching bundles of paid DWP Cashcheques:

- a Horizon Weekly Green Giro Report printed from the Counter Weekly screen must be wrapped around the relevant Girocheques
- an Alliance & Leicester Commercial Bank Office Identification Docket (G6311) must be placed at the front of the bundle and secured with an elastic band.

From early June, RML Swindon, will distribute stocks of the ID Docket (G6311) to all Post Office Branches.

This will be a phased distribution and the date you receive your stock depends on the area code section of your Post Office branch (FAD) code.

Your area code is the last three digits of your Post Office branch (FAD) code.

For example: If your code is 123 456 X, 456 is your area code.

Area codes	To be received by
001 to 134	Tuesday 14 June
136 to 306	Tuesday 21 June
309 to 407	Tuesday 28 June
410 to 546	Tuesday 05 July
548 to 820	Tuesday 12 July
824 to 948	Tuesday 19 July

- If you have not received your stock by the date listed above, or if you require further supplies, please contact: Tony Fleet at Alliance & Leicester on **GRO**

Please **do not** contact RML Swindon.

7.

Government Services: DVLA - UK Photocard Driving Licences.
All Post Office branches except Northern Ireland

Contributor: Neil Taylor

Application Packs (D1 and D1W) ~ last ordering date for current stock

On Friday 15 July 2005, DVLA will introduce revised Application Packs (D1 and D1W).

More details regarding the changes and withdrawal of existing items will be published nearer the time.

Ordering current stock

The final date for ordering stocks of the current Application Packs (D1 and D1W) is Friday 10 June 2005.

No further stocks of Application Packs (D1 and D1W) will be available after this date.

- Please ensure you have enough stock to last the six week period (Friday 10 June 2005 to Friday 15 July 2005) only.

Please note: If you need extra stock to last until Friday 15 July 2005, please try not to order more than is necessary, as any remaining stock cannot be recycled due to the plastic photo patch.

8.

Horizon System. All Post Office branches

Contributor: Doug Brown

New Horizon Cash Declaration entry ~ ATM entry

From Monday 13 June 2005, a new ATM Notes entry will appear in the cash on hand declaration and stock balance screens.

The new entry will appear on the third screen of the declaration above the foreign and mutilated denominations.

Please note: Only branches that use Post Office notes in Alliance & Leicester ATM machines must use the ATM Notes entry.

- Enter your daily ATM cash holdings to your Cash on Hand declaration each night using this entry.

9.

Post Office procedures: Stores Ordering. All Post Office branches

Contributor: Annette Carey

Brown Cash Account Pouch (P6268/60) ~ annual distribution

The annual Brown Cash Account pouch (P6268/60) distribution to all branches will commence at the beginning of June 2005.

- If you have not received your pouches by Wednesday 15 June 2005 please contact the NBSC on **GRO** selecting option 6 for RML Swindon.

continued on page 8...

...continued from page 7

Further supplies

If you need to order further supplies please order them from RML Swindon in the normal way, using the following details:

Item code	Description	Unit of issue
P6268/60	Chesterfield Brown Cash Account Pouch	Pack of 60

10. Postal Services: Inland mail services. All Parcelforce Guaranteed services branches

Contributor: Steve Cole

Exam papers ~ acceptance clarification

You will shortly see an increase in the number of exam paper parcels despatched by schools and markers using Contract Parcelforce Worldwide Services.

Please remember: Only branches with an authorised contract number are allowed to accept exam papers sent by Parcelforce Guaranteed Services.

Customers will have their own Parcelforce Worldwide stationery and the acceptance procedure is unchanged from previous years.

- Please refer to the Operations Manual, Inland Mail Services booklet, para 15.13 page 129, for full acceptance and accounting procedures for exam papers sent by Parcelforce Guaranteed Services.
- Please ensure these items are added onto table 10g and are despatched from your branch on the day you accept them.

11. Postal Services: Postage and other mail services. Franking Resetting branches

Contributor: Olawunmi Babalola

Franking Machine resetting ~ withdrawal of service

On Wednesday 29 June 2005, Royal Mail will withdraw the Franking Machine resetting service from all Post Office branches.

At the end of May, they will be writing to their customers to inform them.

- If a customer enquires about how they will be able to reset their Franking Machine after the withdrawal date, please ask them to contact the Royal Mail Franking Administration Centre on **GRO** or **GRO**

Further information will be published closer to the withdrawal date.

**12. Travel Services: Bureau de Change on-demand.
Bureau de Change on-demand and Euro/Dollar branches**

Contributor: Raj Kalsi

Internet Orders ~ customer collection errors

Currently 33 per cent of Internet Orders, are processed incorrectly.

Over the next few weeks we will be publishing articles highlighting the correct processes for the main Internet Order errors made by branches.

Please remember: For full details on processing Internet Orders, refer to the Operations Manual, Bureau de Change On Demand booklet, para 6.3, page 32.

Customer collection

When the customer calls to collect their order

- ask the customer for their order reference number
- check the reference number against the one shown on the order you have
- if the customer cannot supply a reference number, ask them for their name, address and order details and check them against the details shown on the customers receipt that accompanied the order

Please remember: If the order is not collected within seven days, contact First Rate Travel Services for advice.

- open the clear plastic pouch in front of the customer
- confirm the customers preferred method of payment
- agree the contents of the pouch against the details of the enclosed customer receipt
- accept payment from the customer

Please remember: If payment is made by debit/credit card then ensure you follow the instructions shown under 'Debit and credit card payments' in the Operations Manual, Bureau de Change On Demand booklet, para 6.3, page 35.

- if applicable, advise the customer to sign any Travellers Cheques in top left hand corner

Please remember: If the order is not what the customer requested, contact First Rate Travel Services on

GRO

- complete the Acknowledgement of Receipt of Order Form (P4821)
- cross out the words 'To Pay' and annotate with 'Paid with Thanks'
- ask customer to sign the Acknowledgement of Receipt of Order Form (P4821)
- enter the transaction on Horizon
- refer to the Operations Manual, Bureau de Change On Demand booklet, para 6.3, page 35.

13. Travel Services: United Kingdom Passport Service (UKPS). UKPS Check & Send branches

Contributor: Jim Williams

Passport applications reversals ~ clarification

Product and Branch Accounting (PBA) Chesterfield have reported that 12 per cent of branches have incorrectly carried out reversals of Check & Send passport application transactions causing reconciliation and settlement problems.

You **must not** reverse a Check & Send transaction after the application has been despatched.

- If a customer returns to your branch to cancel a Check and Send transaction after the application has been despatched, you must advise the customer that:
 - you cannot deal with the refund
 - they must contact the Passport Office directly.

14. Miscellaneous - Operational Publications. All Post Office branches

Contributor: Steve Austin

Operations Manual ~ distribution of revised Automated Payments booklet 2

From Tuesday 31 May 2005, a revised version of the Automated Payments booklet 2 Operations Manual (COMB 40/8) will be distributed to all Post Office branches and to other Operations Manual users.

- If you do not receive your new booklet by Wednesday 8 June 2005, please contact the NBSC on selecting option 6 for RML Swindon.

When you receive your new booklet:

- remove the previous version, Automated Payments booklet 2 (COMB 40/7), from the Volume 4 binder (Bill Payments/Local Schemes/Travel Services)
- insert the new booklet (dated May 2005) into the same place according to the order on the binder cover
- destroy the previous version (dated April 2003) in accordance with local instructions for paper disposal.

Blank page

Actions for week commencing Monday 30 May 2005

Please note that this table is unlikely to contain details of every action you will need to take during this week.

You will need to continue to read all relevant Operational Focus articles, and plan your actions in the same way you normally plan for changes.

Product	Change	Actions	Date	Article ref
Swindon Meals on Wheels	New voucher	Put on sale	Monday 30 May	Issue 7, article 8
Telephone services	New T-Mobile E-Top Ups and E-Vouchers	Put on sale	Monday 30 May	Issue 9, article 13
Trooping the Colour - special issue	First Day Envelopes and Royal Mail Stamp Cards	Put on sale	Tuesday 31 May	Issue 4, article 9
A&L Flexisaver account	On-line banking services available	Offer on-line services	Tuesday 31 May	Issue 9, article 1
New definitives	Presentation Packs	Remove from sale at close of business	Wednesday 1 June	Week 47, article 7
Horizon	Pensions and Allowance screen removed	Screen no longer required	Wednesday 1 June	Issue 9, article 6
Smarthelp	Information updated	Check the 'Whats New' screen	Thursday 2 June	Issue 4, article 8

Operational Focus is for internal use by personnel working in Post Office branches® only. Articles must not be given, copied, or shown to members of the public.

© Post Office Ltd 2005. All rights reserved.

The Post Office and the Post Office symbol are registered trademarks of Post Office Ltd in the UK and other countries.

Produced by Operational Publications team, 80-86 Old Street, LONDON EC1V 9NN

Printed by Romec Print Solutions on environmentally friendly paper

Operational Focus must be retained for one year from the publication date