



# Retail

## Structured On-the-Job Training Core Processes

### Workbook

Course #23Q01-06

NSN #7610040009881

December 23, 1999

EMPLOYEE RESOURCE MANAGEMENT

**EMPLOYEE DEVELOPMENT/RETAIL  
WORKFORCE STRATEGIES**

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United States Postal Service  
Employee Development/Retail Workforce Strategies  
475 L'Enfant Plaza SW  
Washington, D.C. 20260-4215

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## **Use of Training Materials**

These training course materials are intended to be used for training purposes only. They have been prepared in conformance with existing USPS policies and standards and do not represent the establishment of new regulations or policies.

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## A COMMITMENT TO DIVERSITY

The Postal Service is committed to fostering and achieving a work and learning environment that respects and values a diverse **workforce**. Valuing and managing diversity in the Postal Service means that we will build an inclusive environment that respects the uniqueness of every individual and encourages the contributions, experiences and perspectives of all people.

It is essential that our work and learning environments be free from discrimination and harassment on any basis.

In our classrooms, on the workroom floor, in casual conversation and in formal meetings, employees and faculty are asked to encourage an open learning environment that is supportive to everyone.

Course materials and lectures, classroom debates and casual conversation should always reflect the commitment to safety and freedom from discrimination, sexual harassment and harassment on any prohibited basis.

EAS training staff has a professional obligation to provide a safe, discrimination free and sexual harassment free learning environment. Instructors are expected to support this commitment. Class participants are asked to support the goal of zero tolerance of behavior that violates these commitments.

If you find course material that is presented in the classroom or in self-instructional format that does not follow these guidelines, please let an instructor know immediately.

If classroom discussions do not support these principles, please point that out to the instructor as well.

Diversity is a source of strength for our organization. Diversity promotes innovation, creativity, productivity and growth, and enables a broadening of existing concepts.

The Postal Service's policy is to value the diversity of our employees, customers and suppliers, to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

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## U.S. Postal Service Policy on Diversity

It is the policy of the U.S. Postal Service to value and manage the diversity of our employees, customers, and suppliers by doing what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

Diversity in the U. S. Postal Service is defined as the mixture of differences and similarities of our employees, customers, and suppliers. Simply stated, valuing and managing diversity in this organization means that we will build an inclusive environment that respects the uniqueness of **every** individual and encourages the contributions of people from different backgrounds, experiences, and perspectives.

Diversity is key to our corporate success because it affects every aspect of our organization: employees, customers, and business. The strategic advantage of investing in a strong diversity program is the creation of a positive work environment that recognizes the contributions of all employees with diverse backgrounds.

We will focus on diversity in our recruitment, selection, and retention of employees. When developing succession plans and making promotions, we will strongly support diversity, thereby creating an even playing field for all employees. To ensure that we meet the needs of our diverse customers, we will eliminate barriers and create products and services relevant to our diverse communities with a goal of increasing customer satisfaction ease of use and revenue. We will ensure that all suppliers have the opportunity to compete for our contracts, and that our local purchasing policies support the local business community and encourage economic development of all diverse groups.

All employees share responsibility for achieving our diversity goals. For diversity to be successfully integrated, diversity initiatives must continue to be guided by leadership's full commitment. All executives, managers, and supervisors are responsible and accountable for managing and integrating diversity into our business management process.

To build mutual respect into all of our relationships, employees at all levels must get involved and participate by valuing the differences and cultures of others as well as their own. This will require mutual adjustment and understanding. These actions are critical to diversity's becoming an integral part of the organization and benefiting not only the individual but, ultimately, our national and global marketplace.

To achieve the maximum success in each of our corporate goals, diversity must be afforded the same focus as the key indicators under the *CustomerPerfect!<sub>sm</sub>* umbrella. To create the required balance between employee satisfaction and customer satisfaction, we must employ strategies and values that promote fairness and opportunities, instill pride, and enhance safety in the workplace.

Together we can ensure that every decision we make will support a diversity plan that benefits our employees and the communities we serve in a way that allows the U.S. Postal Service to achieve maximum corporate success and positive recognition as a world-class business leader.

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William J. Henderson, Postmaster General, CEO  
*Postal Bulletin* 21978, 8-27-98

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## **U.S. Postal Service Policy on Sexual Harassment**

The U.S. Postal Service is committed to providing a work environment free of sexual harassment.

Sexual harassment is improper and/or unlawful conduct that undermines the employment relationship as well as employee morale. Examples of such harassment include, but are not limited to, the following:

- Making or threatening to make employment decisions based on an employee's submission to or rejection of sexual advances or request for sexual favors.
- Deliberate or repeated unsolicited remarks with sexual connotation or physical contacts of a sexual nature that are unwelcome to the recipient.
- A sustained hostile and abusive work environment so severe and pervasive that it interferes with or changes the conditions of one's employment.

Employees who engage in sexual harassment will be subject to disciplinary action, up to and including removal.

If an employee engages in inappropriate conduct in the workplace, it may also violate the Postal Service's standards of conduct. Disciplinary action may result even if the conduct is not sexual harassment under the law.

All managers and supervisors are responsible for preventing sexual harassment in the workplace and must respond promptly when they learn of any conduct that may be sexual harassment. Managers and supervisors must see that a prompt and thorough investigation of the conduct takes place. If sexual harassment is found, they must take prompt and appropriate remedial action.

Postal Employees who believe that they are the victims of sexual harassment should bring the situation to the attention of any supervisor or manager, or to Human Resources.

In addition, employees can seek relief through the Equal Employment Opportunity (EEO) complaint process, grievance arbitration procedures for bargaining unit employees under the collective bargaining agreements, and the grievance procedures, where appropriate, under the ELM for applicable non-bargaining employees. If pursuing an EEO complaint, you must contact an EEO counselor within 45 days of the act(s) giving rise to your claim in order to preserve your rights under federal law.

Report any possible criminal misconduct to the Postal Inspection Service.

The U.S. Postal Service will not tolerate sexual harassment.

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William J. Henderson, Postmaster General, CEO  
*Postal Bulletin* 21978, 8-13-98

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## **PREFACE**

The Retail Structured On-the Job Core Processes were designed to provide Retail Coaches with a series of core lesson plans. Structured on-the-job training is used to acquaint employees with their new positions, to acquire knowledge and skills related to changes in work processes, and to implement refresher training.

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## Sample Script for Conducting Structured On-the-Job Training

1. Introduction. Hello, my name is \_\_\_\_\_. I am your RETAIL COACH.
2. The task we are going to work on today is [read from Training Worksheet]. By the end of this session, you will be able to [read from Terminal Objective]. The prerequisite for performing this task is that you have already taken the Sales and Service Associate Training Program. In addition, I'd like to review GIST with you before we begin. [Briefly, review Greet, Inquire, Suggest and Thank.]
3. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "Retail Coach will" and having the future associate repeat the demonstration by doing what is listed under "Future Associate will." Do this for all steps listed (up to 10 for each process).
4. For certification, either with the retail coach acting as customer or with an actual customer, have the future associate demonstrate the tasks listed. Check off the steps that were completed correctly by the future associate. If the future associate misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the future associate go through the entire task and check off the steps that were completed correctly. If the future associate misses a step and a role-play is being used, have the future associate complete the entire task again. If the future associate misses the step twice, place an X next to the step.
5. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for completed steps. Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for steps not completed.
6. Indicate the number of steps that were completed successfully on the Structured Training Certification Worksheet and the PS Form 2528.
7. Make it a point during day one to show the future associate all necessary emergency exits, fire extinguisher placements and emergency numbers.
8. Make it a point during day one to show the future associate the break area and personal convenience areas.
9. Take time during the first 32 core processes to cordially introduce the future associate to the entire retail team which includes the manager of customer services, supervisor of customer services and the other sales and services associates, window clerks and sales associates.

# Structured On-the-Job Training Worksheet (Core Lessons)

Sales and Services Associate: \_\_\_\_\_

Retail Coach: \_\_\_\_\_ Unit Trained: \_\_\_\_\_

Date Completed: \_\_\_\_\_ Unit Assigned: \_\_\_\_\_

<b>Mandatory Structured On-the-Job Training Lessons</b>	Steps in Lesson (a)	<u>Steps Completed Successfully</u> (b)	Percentage of Steps Completed Successfully (c)	Retail Coach Initials	Future Associate Initials
1. Selling and Accepting Domestic Express Mail	10				
2. Selling and Accepting Domestic Priority Mail	6				
3. Selling and Accepting Certified Mail	7				
4. Selling and Accepting Delivery Confirmation	5				
5. Selling and Accepting Domestic Numbered Insured Mail	9				
6. Selling and Accepting Domestic Unnumbered Insured Mail	8				
7. Selling and Accepting Domestic Registered Mail	10				
8. Selling and Accepting Domestic C.O.D. Mail	8				
9. Selling and Accepting Domestic Return Receipt for Merchandise	8				
10. Selling and Accepting Domestic Certificate of Mailing	9				
11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)	6				
12. Accepting and Identifying Domestic Machineable Articles	7				
13. Accepting and Identifying Domestic Non-Machineable Articles	7				
14. Selling Domestic Postal Money Orders	10				
15. Selling Stamps and Postal Retail/Package Products	6				
16. Selling and Accepting Military Mail (APO or FPO)	7				
17. Completing Customs Forms	7				
18. Selling and Accepting International Insured Mail	10				
19. Selling and Accepting International Registered Mail	10				
20. Selling International Mail Return Receipt	9				
21. Accepting and Processing of Bank Cards	7				
22. Cashing Domestic Postal Money Orders	10				
23. Securing and Accounting for Domestic Money Orders	7				
24. Renting a Post Office Box	10				
25. Delivering Registered Mail	9				
26. Delivering Express Mail	9				
27. Delivering Certified Mail	10				
28. Delivering Postage Due or Business Reply Mail	7				
29. Delivering Domestic Insured Mail	10				
30. Delivering Collect-On-Delivery (COD) Articles	10				
31. Dispatching Registered Mail to the Processing and Distribution Center	7				
32. Working With the Express Mail Network Directory	9				

Total Number of Tasks with 80% or More Steps Completed Correctly: \_\_\_\_\_

# STRUCTURED ON-THE-JOB PROCESSES

## TABLE OF CONTENTS

1. Selling and Accepting Domestic Express Mail
2. Selling and Accepting Domestic Priority Mail
3. Selling and Accepting Certified Mail
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5. Selling and Accepting Domestic Numbered Insured Mail
6. Selling and Accepting Domestic Unnumbered Insured Mail
7. Selling and Accepting Domestic Registered Mail
8. Selling and Accepting Domestic C.O.D. Mail
9. Selling and Accepting Domestic Return Receipt for Merchandise
10. Selling and Accepting Domestic Certificate of Mailing
11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)
12. Accepting and Identifying Domestic Machineable Articles
13. Accepting and Identifying Domestic Non-Machineable Articles
14. Selling Domestic Postal Money Orders
15. Selling Stamps and Postal Retail/Package Products
16. Selling and Accepting Military Mail (APO or FPO)
17. Completing Customs Forms
18. Selling and Accepting International Insured Mail
19. Selling and Accepting International Registered Mail
20. Selling International Mail Return Receipt
21. Accepting and Processing of Bank Cards
22. Cashing Domestic Postal Money Orders
23. Securing and Accounting for Domestic Money Orders
24. Renting a Post Office Box
25. Delivering Registered Mail
26. Delivering Express Mail
27. Delivering Certified Mail
28. Delivering Postage Due or Business Reply Mail
29. Delivering Domestic Insured Mail
30. Delivering Collect-On-Delivery (COD) Articles
31. Dispatching Registered Mail to the Processing and Distribution Center
32. Working With the Express Mail Network Directory

# Training Worksheet

## Lesson #01

---

Task:  
Selling and Accepting Domestic Express Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Express Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review GIST  
\_\_\_\_\_ Process #32

---

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play) and samples for training	
_____ Express Mail Labels	_____ Tag 44
_____ Express Network	_____ All necessary forms
_____ IRT/POS ONE System	_____ Express Mail Samples
_____ Scale/Rate fold	_____ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Domestic Express Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain proper PS Forms 11a or B, 3811 (if applicable) and how to complete, assisting customer if necessary.

Future Associate will  
State how to complete forms and assist customer.

---

\_\_\_\_\_ 4. RC will

Explain express insurance and waiver of signature option and endorsements.

Future Associate will  
State express insurance and waiver of delivery option.

---

\_\_\_\_\_ 5. RC will

Explain how to use retail equipment to determine delivery network and fees.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain scanning label and demonstrate affixing postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Selling and Accepting Domestic Express Mail

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate closing professionally.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate where to place article for dispatch.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #02

---

Task Name:  
Selling and Accepting Domestic Priority Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Priority Mail

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Aviation Security Training  
\_\_\_\_\_ HAZMAT Training  
\_\_\_\_\_ Knowledge of the *Domestic Mail Manual*  
\_\_\_\_\_ Knowledge of *Postal Bulletins*

---

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)	_____ IRT/POS ONE System
_____ Priority Mail Supplies	_____ Tag 44
_____ Postage	_____ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate processing priority package on IRT/POS ONE, print and affix PVI label.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**). Include letting customer know about additional supplies.

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---

# Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #03

---

Task:  
Selling and Accepting Certified Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Certified Mail

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Knowledge of *Domestic Mail Manual*  
\_\_\_\_\_ Knowledge of *Postal Bulletin*  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE	_____ Customer (role-play)
_____ Rate chart, scale	_____ Return receipt stamp
_____ PS Forms	_____ Pen/pencil
_____ Round date stamp	
_____ Postage	

---

# Training Worksheet

Task: Selling and Accepting Certified Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to complete PS Forms 3800 and 3811 (if requested).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate review of customer PS Forms 3800 and 3811 (if requested) to verify all blocks are complete.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to prepare article for mailing, including, round date of PS Form 3800 and printing PVI label.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Certified Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #04

---

**Task:**

Selling and Accepting Delivery Confirmation

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Delivery Confirmation at the Retail Service Counter

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security

\_\_\_\_\_ HAZMAT Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ TRANS 380

\_\_\_\_\_ Package (training)

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Train Scan Sheet

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ *Domestic Mail Manual*

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Delivery Confirmation

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer on service and additional services that can be provided. (Priority, Standard B, etc.) (**GIST**)

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain/demonstrate how to complete PS Form 152 (customer completes).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain/demonstrate how to use equipment to process service (this includes proper placement of label and round date).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain/demonstrate customer payment options and process payment (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Selling and Accepting Delivery Confirmation

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #05

---

**Task:**

Selling and Accepting Domestic Numbered Insured Mail

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Domestic Numbered Insured Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Tag 44

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain checking item for proper packaging and complete addressing (item perishable, fragile, or hazardous?).

Future Associate will  
Check package and address blocks.

---

\_\_\_\_\_ 4. RC will

Explain how to calculate postage and fees on equipment, complete PS Form 3813P and 3811 (if requested), round date and attach.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain how to detach and endorse PS Forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #06

---

**Task:**

Selling and Accepting Domestic Unnumbered Insured Mail

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Domestic Unnumbered Insured Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ IRT/POS, rate fold and scale/zone chart

\_\_\_\_\_ PS Form 3813

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Tag 44

\_\_\_\_\_ Elliptical Stamp

\_\_\_\_\_ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
- **Aviation Security**

# Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Review demonstration.

---

\_\_\_\_\_ 3. RC will

Explain reviewing packaging of item and proper addressing and asking customer if the item contains perishable, fragile or hazardous material.

Future Associate will  
Review item for proper packaging and complete addressing and asking customer if the item contains perishable, fragile or hazardous material.

---

\_\_\_\_\_ 4. RC will

Explain how to process on equipment and completion of forms, including endorsements.

Future Associate will  
State and demonstrate.

---

\_\_\_\_\_ 5. RC will

Explain value sell (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain printing PVI label and affixing postage.

Future Associate will  
Print PVI and affix postage.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #07

---

Task:  
Selling and Accepting Domestic Registered Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Registered Mail

---

Prerequisites:

- \_\_\_\_\_ Sales and Services Associate Training Course
  - \_\_\_\_\_ Knowledge of *Domestic Mail Manual*
  - \_\_\_\_\_ Knowledge of *Postal Bulletin*
  - \_\_\_\_\_ Review **GIST**
  - \_\_\_\_\_ Aviation Security Training
  - \_\_\_\_\_ HAZMAT Training
  - \_\_\_\_\_ DM 901 Registered Manual
  - \_\_\_\_\_ Review Training Worksheet #45, "Exchanging of Registered Mail between Employees"
- 

Supplies and Equipment Needed for This Training Session:

- |   |                            |
|---|----------------------------|
| _____ PS Form 3806                                    | _____ IRT/POS ONE System   |
| _____ Label 200                                       | _____ Tag 44               |
| _____ <i>Domestic Mail Manual and Postal Bulletin</i> |                            |
| _____ Scale/rate fold/zone chart                      | _____ Registered Mail Tape |
| _____ Postage/PVI                                     | _____ Samples for training |
| _____ Round date stamp                                | _____ Pen/pencil           |
| _____ Customer (role-play)                            |                            |
- 

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting techniques (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**). *Reminder: review machineable and non-machineable standards.*

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate what procedures to follow to secure item (i.e., proper packaging, shake test, and questions regarding item being fragile, perishable, or hazardous).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain form completion to customer.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate using retail equipment for postage and fees.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate package requirements, including endorsements and postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain how and where to secure registered article.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #08

---

Task:  
Selling and Accepting Domestic COD Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic COD Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Aviation Security Training  
\_\_\_\_\_ HAZMAT Training

---

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System	_____ Customer (role-play)
_____ PVI/Postage	_____ Elliptical stamp
_____ Scale/rate fold/zone chart	_____ Tag 44
_____ PS Form 3816	_____ Pen/pencil
_____ Round date stamp	
_____ Role-play samples	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting Domestic COD Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain what additional services are available with COD service (**GIST**).

Future Associate will  
State what services are available with COD.

---

\_\_\_\_\_ 4. RC will

Explain/demonstrate how to complete PS Form 3816. Note: if express, then the express number becomes the COD control number.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain how to calculate fees and affix postage.

Future Associate will  
Calculate fees and affix postage.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic COD Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #09

---

### Task:

Selling and Accepting Domestic Return Receipt for Merchandise

---

Terminal Objective: review with future Associate

How to Sell and Accept a Return Receipt for Merchandise

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ IRT/POS System

\_\_\_\_\_ Scale, rate chart

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Appropriate stampers

\_\_\_\_\_ Tag 44

\_\_\_\_\_ Postage

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Customer (role-play) and samples for training

\_\_\_\_\_ Rate Chart

---

# Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. Determine class of mails (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to instruct customer on completing PS Form 3804 and 3811 (if applicable). Explain waiver of signature option (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to complete USPS part of PS Form 3804 and 3811. Apply PVI label and round date receipt. Complete form processing using retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate attaching PS Forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #10

---

Task:  
Selling and Accepting Domestic Certificate of Mailing

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Certificate of Mailing.

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Aviation Security Training  
\_\_\_\_\_ HAZMAT Training

**NOTE: This process begins after a product or service has been sold to a customer.**

---

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)	_____ <i>Domestic Mail Manual</i>
_____ PVI/meter/postage	_____ <i>International Mail Manual</i>
_____ PS Form 3817	_____ Round date stamp
_____ IRT/POS ONE System	_____ Pen/pencil
_____ Tag 44	

---

# Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate giving customer PS Form 3817 and assisting, if necessary to complete form (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain the importance of verifying the PS Form 3817 to the mailpiece.

Future Associate will  
State the importance of verifying PS Form 3817 to mailpiece.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to affix postage to PS Form 3817 or to article (if necessary); round date on meter or stamps.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

---

\_\_\_\_\_ 8. RC will  
Demonstrate giving customer receipt, PS Form 3817.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 9. RC will  
Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #11

---

### Task:

Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

Terminal Objective: review with future Associate

How to Sell and Accept Domestic Return Receipt Service AFTER Mailing

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ PS Forms 3811A and special mailing receipt, and other forms

\_\_\_\_\_ IRT/POS ONE System \_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Postage

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Samples for training

---

# Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate completion of USPS part of PS Form 3811 A and affix postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---

# Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #12

---

Task Name:

Accepting and Identifying Domestic Machineable Articles

---

Terminal Objective: review with future Associate

How to Accept and Identify Domestic Machineable Articles

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Knowledge of *Domestic Mail Manual*

\_\_\_\_\_ Knowledge of *Postal Bulletin*

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Scale/postage

\_\_\_\_\_ Tag 44

\_\_\_\_\_ Tape measure

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Stampers

\_\_\_\_\_ Machineable chart/template

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Accepting and Identifying Domestic Machineable Articles

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Ask clarifying questions to determine customer needs.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to determine if item is mailable; inquire if fragile, perishable, or hazardous.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to prepare package, i.e., postage, labels, and forms, and include endorsements.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Accepting and Identifying Domestic Machineable Articles

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #13

---

### Task:

Accepting and Identifying Domestic Non-Machineable Articles

---

Terminal Objective: review with future Associate

How to Accept and Identify Domestic Non-Machineable Articles.

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

\_\_\_\_\_ Knowledge of the *Domestic Mail Manual*

\_\_\_\_\_ Knowledge of *Postal Bulletin*

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ *Domestic Mail Manual*

\_\_\_\_\_ IRT/POS ONE

\_\_\_\_\_ Fan Scale (For Manual Offices)

\_\_\_\_\_ Fan Scale

\_\_\_\_\_ *Postal Bulletin*

\_\_\_\_\_ Non-Machineable Chart

\_\_\_\_\_ X-stamper set

\_\_\_\_\_ Template

\_\_\_\_\_ Tape Measure

\_\_\_\_\_ Tag 44

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Customer (role-play)

---

### Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Accepting and Identifying Non-Machineable Articles

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**). *Reminder: ask if article is fragile, perishable, or hazardous.*

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to determine if the article is Non-Machineable, based on size or weight.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to prepare article for mailing.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Accepting and Identifying Non-Machineable Articles

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**      \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #14

---

Task:  
Selling Domestic Postal Money Orders

---

Terminal Objective: review with future Associate  
How to Sell a Domestic Postal Money Order

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:

_____ Money Order Printer	_____ Pen/pencil
_____ Money Order (training)	
_____ IRT/POS ONE System	
_____ Manual tracking form	
_____ Customer (role-play)	

---

# Training Worksheet

Task: Selling Domestic Postal Money Orders

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to review procedures of identifying repeat customers that purchase large amounts of money orders on a regular basis, anti money order laundering system (bank security).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain checking money order printer for correct date and then process voucher on local equipment (imprint).

Future Associate will  
Review date on printer and process voucher on equipment.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to review information on money order including verifying number against the POS ONE and dollar amount. Review voiding money orders and correcting amounts on retail equipment.

Future Associate will  
State reviewing money order.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 7. RC will

Demonstrate removing postal receipt from voucher, if applicable. State customer payment options and process payment (**GIST**), posting on checklist or in retail equipment.

Future Associate will  
Repeat demonstration.

# Training Worksheet

Task: Selling Domestic Postal Money Orders

---

\_\_\_\_\_ 8. RC will

Explain coaching customer on completing blocks on money orders and maintaining receipts for their records. Complete transaction.

Future Associate will  
Coach customer and demonstrate completing transaction.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain procedure for retaining money order vouchers and posting on checklist.

Future Associate will  
State and demonstrate.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #15

---

Task:  
Selling Stamps and Postal Retail/Package Products

---

Terminal Objective: review with future Associate  
How to Sell Stamps and Postal Retail/Package Products

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:  
\_\_\_\_\_ IRT/POS ONE System  
\_\_\_\_\_ Stamp Products or Scan Sheet  
\_\_\_\_\_ Customer (role-play)  
\_\_\_\_\_ Pen/pencil

---

**NOTE to all RCs teaching this session:**  
**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
- **Aviation Security**

---

# Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate professional customer greeting (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain different ways to sell loose stamps, books, coils, and packaging products.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell.

Future Associate  
Explain value sell.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---

# Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #16

---

**Task:**

Selling and Accepting Military Mail (APO or FPO)

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Military Mail to an APO or FPO

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ *Domestic Mail Manual*

\_\_\_\_\_ Knowledge of *Postal Bulletin*

\_\_\_\_\_ Customs forms

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Fan Scale (For Manual Offices)

\_\_\_\_\_ Mail Samples

\_\_\_\_\_ PAL/SAM stamps

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

## Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

---

\_\_\_\_\_ 1. RC will

Demonstrate a professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to determine article can be mailed via military. Use *Postal Bulletin* to review restrictions. Not: review for machineable or non-machineable standards (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to complete forms. Cover aviation security questions.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate weighing article and attaching postage. Use retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #17

---

Task:  
Completing Customs Forms

---

Terminal Objective: review with future Associate  
How to Complete Customs Forms

---

Prerequisites:

- \_\_\_\_\_ Sales and Services Associate Training Course
- \_\_\_\_\_ Review **GIST**
- \_\_\_\_\_ Aviation Security Training
- \_\_\_\_\_ HAZMAT Training
- \_\_\_\_\_ Process #36 (Selling and Accepting Express Mail Military Service)

---

Supplies and Equipment Needed for This Training Session:

- |                                      |  |
|--------------------------------------|--|
| _____ CF 2976, 2976A, 2976E          | _____ Rate fold chart                  |
| _____ PS Form 3813P                  | _____ <i>International Mail Manual</i> |
| _____ IRT/POS ONE System             | _____ Round date stamp                 |
| _____ <i>Postal Bulletin</i> updates | _____ Pen/pencil                       |
| _____ Customer (role-play) and       |  |
| _____ Mailpiece Samples              |  |

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Completing Customs Forms

---

\_\_\_\_\_ 1. RC will

Explain how to determine appropriate customs forms. Use IMM for reference **(GIST)**.

Future Associate will  
Identify appropriate customs form using the *International Mail Manual*.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to assist customer in completing forms and explain the purpose **(GIST)**.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to verify and complete customs forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain how to prepare article for mailing, i.e., affix forms and postage (round date), retain appropriate copies for FAA and advise customer of retention **(GIST)**.

Future Associate will  
Prepare article for mailing.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique **(GIST)**.

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment **(GIST)**.

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally **(GIST)**.

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Completing Customs Forms

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #18

---

Task:  
Selling and Accepting International Insured Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept International Insured Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Aviation Security Training  
\_\_\_\_\_ HAZMAT Training

---

Supplies and Equipment Needed for This Training Session:

_____ <i>International Mail Manual</i>	_____ Round date stamp
_____ Individual Country Listing	_____ Par Avion and Surface
_____ Standard Drawing Rights conversion table	_____ PVI/Postage Stamp
_____ IRT/POS ONE System	_____ Tag 44
_____ Fan Scale (for Manual Offices)	_____ Customer (role-play)
_____ PS Form 2976A	_____ Mailpiece Samples
_____ PS Form 2976E	_____ Pen/pencil
_____ PS Form 3813P	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting International Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to check in the IMM for package restrictions and verify contents and packaging with the customer. Will also ask if fragile, liquid, hazardous; verify addressing and insurance availability (**GIST**).

Future Associate will  
State restrictions using the IMM and verify contents and packaging. Will also ask if article is fragile, liquid, and hazardous.

---

\_\_\_\_\_ 4. RC will

Explain how to assist customer in filling out customs forms PS Forms 2976 A and 3813P and how to verify information on completed forms. Use equipment to determine fees. Also explain endorsements.

Future Associate will  
State how to assist customer in preparing customs forms and how to verify completed forms.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to complete postal section of forms using the conversion chart.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain how to affix all forms, endorsements, and postage to mailpiece.

Future Associate will  
State how to attach all forms, endorsements, and postage to mailpiece.

---

\_\_\_\_\_ 7. RC will

Demonstrate issuing receipts while explaining the importance of receipt retention (**GIST**).

Future Associate will  
Repeat demonstration.

# Training Worksheet

Task: Selling and Accepting International Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

**How tested:** \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Actual Teaching Time (Min.): \_\_\_\_\_

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #19

---

**Task:**

Selling and Accepting International Registered Mail

---

**Terminal Objective:** review with future Associate

How to Sell and Accept International Registered Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ *International Mail Manual*

\_\_\_\_\_ Scale/rate fold

\_\_\_\_\_ PS Form 3806

\_\_\_\_\_ Label 200

\_\_\_\_\_ Label 19A

\_\_\_\_\_ Label 19B

\_\_\_\_\_ Customer forms

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Paper Tape

\_\_\_\_\_ Tag 44

\_\_\_\_\_ DM-901

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Customer (role-play)

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
-

## Training Worksheet

Task: Selling and Accepting International Registered Mail

---

\_\_\_\_\_1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_3. RC will

Demonstrate how to check ICLs in the IMM for prohibitions, restrictions, observations, and correct customs forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_4. RC will

Explain packaging requirements for International Registered Mail and maximum indemnity.

Future Associate will  
State proper packaging requirements.

---

\_\_\_\_\_5. RC will

Demonstrate completing necessary forms: i.e., customs, PS Form 3806.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_6. RC will

Demonstrate proper placement of Label 200, endorsements, and postmarks (on back of mailpiece and on all seams).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_7. RC will

Use equipment or rate fold to determine fees and attach.

Future Associate will  
State how to attach postage and fees.

---

# Training Worksheet

Task: Selling and Accepting International Registered Mail.

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**), explain where and how to secure International Registered article.

Future Associate will  
Demonstrate professional closing and storing of article.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #20

---

### Task:

Selling and Accepting International Mail Return Receipt

---

Terminal Objective: review with future Associate

How to Sell and Accept International Mail Return Receipt

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Aviation Security Training

\_\_\_\_\_ HAZMAT Training

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ *International Mail Manual*

\_\_\_\_\_ PS Form 2865

\_\_\_\_\_ PS Form 8099

\_\_\_\_\_ Insurance form

\_\_\_\_\_ Register label (#'s)

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Custom forms

\_\_\_\_\_ Tag 44

\_\_\_\_\_ *Postal Bulletin*

\_\_\_\_\_ Scale

\_\_\_\_\_ Rate fold

\_\_\_\_\_ Pen/pencil

---

### Note to all RCs teaching this session:

Training steps that are specific to clarifying questions asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain to customer the Return Receipt availability. Use *International Mail Manual* and retail equipment to determine postage and fees.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain to customer how to complete PS Form 2865.

Future Associate will  
State and demonstrate how customer will fill out PS Form 2865.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate how to complete corresponding forms. Prepare article for mailing.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate how to use equipment to complete transaction.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

# Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Explain professional closing.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #21

---

Task Name:  
Accepting and Processing Bank Cards

---

Terminal Objective: review with future Associate  
How to Accept and Process a Bank Card Transaction on the TRANZ 380

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training  
\_\_\_\_\_ Review **GIST**

---

**NOTE: This training process begins after the sale of a product or service.**

Training Tools:

_____ TRANZ 380	_____ POS ONE Quick Reference Guide
_____ IRT/POS	_____ Pen/pencil
_____ Training bank card	
_____ Customer (role-play)	

---

# Training Worksheet

Task: Accepting and Processing Bank Cards

---

\_\_\_\_\_ 1. RC will

Explain types of bank cards accepted and review information on card (**GIST**).

Future Associate will

State what types of cards are accepted and review items on card.

---

\_\_\_\_\_ 2. RC will

Demonstrate what keys are used on Trans 380 to process transaction.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to swipe the customer bank card.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate entering 2-digit ID and 4-digit password for amount of sale.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain reviewing signature compared to bank card and proper distribution of receipts.

Future Associate will

State reviewing signature and distribution of receipts.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will

Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Explain securing original receipt of transaction.

Future Associate will

State securing original receipt.

---

# Training Worksheet

Task: Accepting and Processing Bank Cards

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #22

---

### Task:

Cashing Domestic Postal Money Orders

---

Terminal Objective: review with future Associate  
How to Cash a Domestic Postal Money Order

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Knowledge of *Postal Bulletin*

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ *Postal Bulletin*

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ *Domestic Mail Manual*

\_\_\_\_\_ Bank deposit stamp

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Training Money Order

\_\_\_\_\_ *Postal Operations Manual*

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Play Money (training)

# Training Worksheet

Task: Cashing Domestic Postal Money Orders

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to verify that funds are available (bank secrecy act).

Future Associate will  
Verify funds are available.

---

\_\_\_\_\_ 4. RC will

Explain customer requirements i.e., ID and examine money order (**GIST**).

Future Associate will  
State customer requirements.

---

\_\_\_\_\_ 5. RC will

Demonstrate checking money against stolen money order list and checking watermark.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate where customer signs money order, verify signature, and stamp deposit endorsement (IRT).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain how to enter transaction into retail equipment and count funds to customer. Enter on list.

Future Associate will  
Repeat statement, then demonstrate.

---

# Training Worksheet

Task: Cashing Domestic Postal Money Orders

---

\_\_\_\_\_ 8. RC will

Explain value sell (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain entering money order on PS Form 1412 as check if customer purchases a product or service, explain customer payment options and process payment (**GIST**).

Future Associate will  
Enter money order on PS Form 1412. If customer makes additional purchase, state customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate closing professionally.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #23

---

**Task:**

Securing and Accounting for Domestic Money Orders

---

**Terminal Objective:** review with future Associate

How to Secure and Account for Domestic Money Orders

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Domestic Money Orders from designated employee

\_\_\_\_\_ IRT/POS ONE System                      \_\_\_\_\_ POS ONE Quick Reference Guide

\_\_\_\_\_ Cash drawer

\_\_\_\_\_ Supervisor

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ PS Form 17

---

# Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

---

\_\_\_\_\_ 1. RC will

Explain proper ordering procedures using PS Form 17 and handing to designated employee.

Future Associate will  
Order using PS Form 17.

---

\_\_\_\_\_ 2. RC will

Demonstrate opening block set of money order package and verifying sequence (count).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain matching money order sequence to log book, then sign.

Future Associate will  
Show matching money orders to log book and sign.

---

\_\_\_\_\_ 4. RC will

Explain procedures for entering domestic money orders into IRT/POS ONE.

Future Associate will  
Enter money orders into IRT/POS ONE.

---

\_\_\_\_\_ 5. RC will

Explain the importance of issuing money orders in sequence and storage of money orders.

Future Associate will  
State importance of issuing money orders in sequence.

---

\_\_\_\_\_ 6. RC will

Explain that money orders should not be transferred between clerks except in an emergency and how to complete this process. **Note:** *Money orders cannot be transferred between clerks on POS.*

Future Associate will  
State that money orders cannot be transferred between clerks except in an emergency and explain process.

---

\_\_\_\_\_ 7. RC will

Explain office security measures at retail counter and at the end of tour.

Future Associate will  
State office security measures at the retail counter and at the end of tour.

---

# Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #24

---

Task:  
Renting a Post Office Box

---

Terminal Objective: review with future Associate  
How to Rent a Post Office Box

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:

_____ PS Form 1538	_____ Round date stamp
_____ PS Form 3544	_____ <i>Domestic Mail Manual</i>
_____ PS Form 1093	_____ <i>Postal Operations Manual</i>
_____ PS Form 1091	_____ IRT/POS ONE System
_____ P. O. Box rent fee schedule	_____ Pen/pencil
_____ Vacant Post Office Box	_____ Customer (role-play)
_____ Post Office Box keys	

---

## Training worksheet

Task: Renting a Post Office Box

---

\_\_\_\_\_1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_3. RC will

Demonstrate how to help customer complete the PS Form 1093 (advise about no individual change of address from a Post Office Box).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_4. RC will

Demonstrate how to review and verify application information. Complete information on PS Form 1091-A.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_5. RC will

Demonstrate how to issue correct box size, key(s), and PS Form 3575 if needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_6. RC will

Explain how to enter information on retail equipment and demonstrate how to fill out PS Form 1538.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_7. RC will

Demonstrate how to complete PS Form 3544.

Future Associate will  
Repeat demonstration.

---

# Training Worksheet

Task: Renting a Post Office Box

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**). Follow local procedures for form disposition.

Future Associate will  
Close professionally.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #25

---

### Task:

Delivering Registered Mail

---

Terminal Objective: review with future Associate

How to Deliver Registered Mail

---

### Prerequisites:

- \_\_\_\_\_ Sales and Services Retail Training
- \_\_\_\_\_ Knowledge of *Domestic Mail Manual*
- \_\_\_\_\_ Knowledge of *Postal Bulletins*
- \_\_\_\_\_ Review **GIST**

---

### Supplies and Equipment Needed for This Training Session:

- \_\_\_\_\_ *Domestic Mail Manual*
- \_\_\_\_\_ *International Mail Manual*
- \_\_\_\_\_ *Postal Operations Manual*
- \_\_\_\_\_ PS Forms 3849, 3811, 3854
- \_\_\_\_\_ Customer (role-play)
- \_\_\_\_\_ Role-play samples
- \_\_\_\_\_ IRT/POS ONE System
- \_\_\_\_\_ Round date stamp
- \_\_\_\_\_ Pen/pencil

## Training Worksheet

Task: Delivering Registered Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate retrieving article in unit **after** securing equipment and cash drawer.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain purpose for maintaining control of article.

Future Associate will  
State purpose of maintaining control of article.

---

\_\_\_\_\_ 5. RC will

Demonstrate where customer signs for article on PS Forms 3849 and 3811, if applicable. Explain non-revenue key on equipment and depress.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Delivering Registered Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Explain/demonstrate how and where to file PS Form 3849 locally.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #26

---

Task:

Delivering Express Mail

---

Terminal Objective: review with future Associate

How to Deliver an Express Mail Article

---

Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review of **GIST**

---

Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Training item Express Mail if no "Live" piece available

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ *Postal Operations Manual*

---

# Training Worksheet

Task: Delivering Express Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain reviewing customer's PS Form 3849 and requesting to see identification.

Future Associate will  
Review PS Form 3849 and customer's identification.

---

\_\_\_\_\_ 3. RC will

Using security procedures, show office location of Express Mail item and retrieve.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain what blocks the customer and the employee complete. If applicable, perform delivery scan.

Future Associate will  
State what blocks are completed.

---

\_\_\_\_\_ 5. RC will

Explain removing USPS copy of form and handing customer the item.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique. Explain waiver of signature (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Delivering Express Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Explain/demonstrate where to file Express Mail label locally.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #27

---

Task:

Delivering Certified Mail

---

Terminal Objective: review with future Associate

How to Deliver Certified Mail

---

Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ *Domestic Mail Manual*

\_\_\_\_\_ Sample item

\_\_\_\_\_ *Postal Operations Manual*

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ IRT/POS ONE System

---

# Training Worksheet

Task: Delivering Certified Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain checking customer's identification and then retrieving article (secure cash drawer and equipment).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain identifying the certified item as correct and then reviewing item for return receipt.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain where customer signs for item on PS Form 3849 and PS Form 3811 return receipt (if needed).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain where to sign and date USPS blocks on PS Forms 3849 and 3811(if needed). Explain the non-revenue key on retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Delivering Certified Mail

---

\_\_\_\_\_ 8. RC will

Suggest customer payment options and process payment. This process is used only if customer makes a purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate where PS Forms 3849 are stored locally.

Future Associate will  
Repeat demonstration.

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #28

---

Task:  
Delivering Postage Due or Business Reply Mail

---

Terminal Objective: review with future Associate  
How to Deliver Postage Due or Business Reply Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training  
\_\_\_\_\_ Review **GIST**

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Supplies and Equipment Needed for This Training Session:

_____ PS Form 3849	_____ <i>Domestic Mail Manual</i>
_____ PS Form 1096	_____ <i>Postal Operation Manual</i>
_____ PS Form 3805	_____ Customer (role-play)
_____ Postage meter/ PVI	_____ Pen/pencil
_____ Stamps	_____ IRT/POS System
_____ Postage due and business reply mail samples, if no "live mail" available for training	

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# Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

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\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

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\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain retrieving PS Form 3849 from customer and retrieve article. Follow security procedures for securing cash drawer.

Future Associate will  
State retrieving PS Form 3849 from customer and retrieving article.

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\_\_\_\_\_ 4. RC will (ON IRT)

Explain collecting fees from customer and processing and attaching PVI/meter strip/stamps to correct form.

Future Associate will  
Collect fees and print PVI, then attach to form on mailpiece.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

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# Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

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\_\_\_\_\_ 8. RC will

Future Associate will

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\_\_\_\_\_ 9. RC will

Future Associate will

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\_\_\_\_\_ 10. RC will

Future Associate will

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**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #29

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### Task:

Delivering Domestic Insured Mail

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Terminal Objective: review with future Associate

How to Deliver an Insured Article

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### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Knowledge of *Domestic Mail Manual*

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### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Customer (for role-play)

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ Article for training

\_\_\_\_\_ Pen/pencil

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# Training Worksheet

Task: Delivering Domestic Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain retrieving parcel in unit securing cash drawer and equipment.

Future Associate will  
Secure equipment and cash drawer, then retrieve parcel in unit.

---

\_\_\_\_\_ 4. RC will

Explain reviewing parcel condition for any damage.

Future Associate will  
State reviewing article for damage.

---

\_\_\_\_\_ 5. RC will

Demonstrate where customer signs PS Forms 3849 and 3811(if needed). Explain the use of the non-revenue transaction key on retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Show how clerk completes USPS blocks on forms and then hands customer the item. If customer makes purchase, explain customer payment options and process payment (**GIST**).

Future Associate will  
Demonstrate where customer signs for article. State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

If applicable, explain procedure of how to deal with customer if item is damaged.

Future Associate will  
Repeat demonstration.

---

# Training Worksheet

Task: Delivering Domestic Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate how and where to file PS Forms 3849 locally.

Future Associate will  
Repeat demonstration.

---

**How tested:** \_\_\_\_\_ Role-play                      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #30

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### Task:

Delivering Collect-On-Delivery (COD) Articles

---

Terminal Objective: review with future Associate

How to Deliver a Collect on Delivery (COD) Article

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### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ *Postal Operations Manual*

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ PS Form 3816

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ Live article or sample for training

\_\_\_\_\_ Customer (role-play)

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# Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining customer's PS Form 3849, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Using security procedures, explain where to retrieve item and how to verify you have the correct article.

Future Associate will  
Demonstrate retrieving item and state review.

---

\_\_\_\_\_ 4. RC will

Explain maintaining control of article until fees have been collected.

Future Associate will  
State maintaining control of item.

---

\_\_\_\_\_ 5. RC will

Explain payment options and collect fees. Also check item for return receipt. Use on retail equipment to complete transaction.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain how to complete COD forms, including scanning COD label (POS).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment, if customer makes purchase (no credit card for COD payment) (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain trust procedures of handling fees collected. Explain remitting if local policy and filing system, locally.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #31

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### Task:

Dispatching Registered Mail to the Processing and Distribution Center

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### Terminal Objective: review with future Associate

How to Dispatch Registered Mail to the Processing and Distribution Center

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### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Knowledge of *Postal Operations Manual*

\_\_\_\_\_ DM-901

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### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Registry Equipment (seals, carbon paper, locks)

\_\_\_\_\_ PS Form 3854 \_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Dispatch equipment

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Samples for training

\_\_\_\_\_ Register control card

---

# Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate all the necessary forms and equipment needed and the location of where to find items in unit.

Future Associate will  
Collect all required forms and equipment and explain their use.

---

\_\_\_\_\_ 2. RC will

Explain all entries of dispatch forms.

Future Associate will  
Complete all entries on forms.

---

\_\_\_\_\_ 3. RC will

Show where to locate article numbers on PS Form 3854 and verify.

Future Associate will  
Explain where to locate article numbers and verify.

---

\_\_\_\_\_ 4. RC will

Explain closeout of PS Form 3854.

Future Associate will  
Close out form.

---

\_\_\_\_\_ 5. RC will

Review district operating procedures (SOP) and complete required forms if necessary.

Future Associate will  
Review SOP and complete additional forms if required.

---

\_\_\_\_\_ 6. RC will

Demonstrate proper procedure for sealing and securing register equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain how to dispatch item to designated employee.

Future Associate will  
State how to dispatch to designated employee.

---

# Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #32

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### Task:

Working With the *Express Mail Network Directory*

---

Terminal Objective: review with future Associate

How to Determine the Service Commitment for Domestic Express Mail using Directory

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Current *Express Mail Directory*

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ IRT/POS ONE System

\_\_\_\_\_ *ZIP Code Directory*

\_\_\_\_\_ Scale (for manual offices)

\_\_\_\_\_ Label 11a or b

\_\_\_\_\_ *Postal Bulletin*

---

### Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
-

# Training Worksheet

Task: Working With the Express Mail Network Directory

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate retrieving *ZIP Code Directory* and using it to obtain customer's ZIP Code of destination (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain a.m./p.m. next day or second day service.

Future Associate will  
State purpose of a.m./p.m. next day or second day service.

---

\_\_\_\_\_ 5. RC will

Explain giving customer correct information (**GIST**).

Future Associate will  
Give customer correct information.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Working With the Express Mail Network Directory

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Return directory to proper location, if applicable.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_