



Sales and Services Associate Training

Facilitator's Guide
NSN #7610040008859
Course 23501-02

January 2001

EMPLOYEE RESOURCE MANAGEMENT
EMPLOYEE DEVELOPMENT AND
RETAIL WORKFORCE STRATEGIES
WASHINGTON, DC

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United States Postal Service
Employee Resource Management
Employee Development
Retail Workforce Strategies
475 L'Enfant Plaza SW
Washington, DC

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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 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 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 point that out to the instructor as well.

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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PREFACE

The Sales and Services Associate Training for Sales and Services Associates is the result of a Labor/Management Team's efforts to improve training for Sales and Services Associates. The team consisted of field managers, supervisors, clerks and representatives of the American Postal Workers Union (APWU).

This course is designed to provide PS-5 Sales and Services Associates with the basic skills and knowledge to perform the duties of their positions and provide Sales and Services Associates with refresher training.

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Day One

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Introduction

Terminal Objective

Upon conclusion of this section, future Associates will be able to provide an overview of this course's content and teaching methodology.

Enabling Objectives:

Upon conclusion of this section, future Associates will be able to:

- Explain course content
- Explain teaching methodologies
- Identify administrative issues

Time Allocated for This Section: 30 minutes

Instructional Methods: Discussion and Presentation

Summary of Instructional Plan:

Introduce self, conduct student introductions, and address any relevant administrative matters. Explain Sales and Services Associate Training content, objectives, and teaching methodologies.

Materials Required:

Instructor: rip chart, name tent cards, and assorted colored markers.

Participant: workbook, and pens or pencils

Presentation

1. Greet the future Associates as they arrive. Have them complete their name tent cards, and introduce yourself.
2. Have the future Associates form pairs and interview each other for five minutes (name, hometown, interests). Allow five minutes for each future Associate to make a drawing of information collected during the interview. Each future Associate introduces his/her partner using the drawing.
3. Cover administrative matters on a rip chart.
 - Class and Break Times
 - Smoking Policy
 - Facility Arrangements
 - Refreshments
 - Rest Rooms
 - Fire Exits
 - Medical Facilities
 - Dress Code
 - Emergency Plans
4. The facilitator will explain that this training program consists of classroom instruction and learning experiences that actively engage the future Associates through adult learning techniques such as; role-playing, hands-on simulations, etc. This will be followed by Structured On-the-Job Training (SOJT). A pretest will be given at the end of the classroom section, then a final test and evaluation after the Structured On-the-Job Training.
5. The classroom instruction will involve presentations, demonstrations, short reading assignments, discussions, hands-on practice, role-playing, and various other exercises to help you relate the concepts you are learning to what you will do on the job. The SOJT is specific to each type of transaction. This one-on-one training is conducted in a station or branch within your district.
6. The facilitator will inform future Associates that guest speakers may address the class regarding their areas of expertise.

Module 1:

Sales and Services Associates

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Module 1: Sales and Services Associates

Terminal Objective

Upon conclusion of this module, future Associates will be able to describe their roles and responsibilities as Sales and Services Associates.

Enabling Objectives:

Upon conclusion of this module, future Associates will be able to:

- Identify and explain their roles and responsibilities as Sales and Services Associates.

Time Allocated for This Module: 30 minutes

Instructional Methods: Discussion, Presentation, and Video.

Summary of Instructional Plan:

Discuss the duties and responsibilities of Sales and Services Associates and their importance as public contact employees.

Materials Required:

Instructor: Rip Chart, VCR, Overhead Projector and “Customer’s Perceptions” video (Sommers) PUB 551 Point Talk Translator

Future Associates: workbook, pens or pencils

PRESENTATION

The facilitator will show the **video** “Customer Perceptions” and then lead a discussion on the key points.

Have future Associates look at Exhibit 1 in their Workbooks. Ask them what it is a picture of and discuss responses. The picture can be seen in two ways: it is an old woman and/or the profile of a young lady. The picture demonstrates that people see things differently, and that what appears one way to you may appear differently to another.

There’s a saying that goes like this:

It’s not what you say, but what is heard.

It’s not what you show, but what is seen.

It’s not what you mean, but what is understood.

PERCEPTION IS REALITY.

In today’s competitive marketplace, customer perceptions are especially important. Sales and Services Associates have a unique opportunity to positively influence customer perceptions of the Postal Service. The public’s perception of the Postal Service is mostly shaped by what it sees. Sales and Services Associates are the primary contact people have with the Postal Service.

- 1.) Divide the class into groups. Have them discuss and then record on a rip chart the roles and responsibilities of a Sales and Services Associate. Have each group present its responses to the class. The facilitator will lead a discussion on each group’s responses and compare them to the USPS official job duties and responsibilities. (Exhibit 2)
- 2.) The facilitator will lead a brief discussion regarding good and bad personal experiences dealing with the public and record the responses on a rip chart.

DIVERSITY



Note to Facilitator: *Not everyone defines diversity in the same manner. Remember that the USPS respects the uniqueness of every individual, and encourages the contributions, experiences, and perspectives of all people.*

Hand out PUB551

Exhibit 1



Exhibit 2

STD Position Description (Draft) **Position Description**
U.S. Postal Service

Sales and Services Associate, PS-05

Functional Purpose

Performs a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

Duties and Responsibilities

1. Performs any variety of sales and customer services at a retail window such as maintaining sufficient inventory of and selling stamps, stamped paper, other retail products and services and may use a computerized system, accepting and delivering packages and accountable mail; issuing and cashing foreign and domestic postal money orders; accepting and responding to customer claims and inquiries, and providing information to the public regarding postal regulations.
2. Provides sales and customer service support by greeting customers and explaining store layout determining special interests and referring to sales and promotional programs; offers assistance in product selection; provides special assistance; and answers customer inquiries when needed.
3. Provides product and service information to customers, including informing customers regarding special offers; suggestive selling related merchandise; promoting products based on customer needs. Provides additional information regarding product features and services.
4. Handles and processes customer purchases and returns relating to products and services and may use a point of sale system. Assists customers with transactions.
5. Maintains appearance of store by setting up, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers.
6. Conducts product inventories by counting items on hand; attaches and removes security devices; accounts for items on display; and verifies and records sales floor inventory and shrinkage. Brings inventory discrepancies and shrinkage reports to the attention of the appropriate supervisory presence.
7. May verify presort and bulk mailings of all classifications, computing and maintaining on a current basis mailer's credit balances.
8. Checks and sets post office stamp-vending machines and postage meters.

9. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.
10. In addition, may assign and clear accountable items and distribute mail as required; and other duties as assigned.

SUPERVISOR

Supervisor, Customer Services, or other supervisor/designee

SELECTION METHOD

BARGAINING UNIT

Clerk

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Module 2:

Directives

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Module 2: Directives

Terminal Objective

Upon completion of this module, future Associates will demonstrate how to use the directives system to locate information on postal products and services.

Enabling Objectives:

Upon completion of this module, future Associates will be able to identify and demonstrate how to use USPS directives, including manuals, handbooks, postal bulletins and publications for Sales and Services Associates' use.

Time Allocated for This Module: 45 minutes

Instructional Methods: Discussion, Presentation, and Exercises

Summary of Instructional Plan:

Materials required:

Instructor: flip chart, markers, pen and pencils, overhead/transparencies, DMM, IMM Postal Bulletin, ASM, POM and F-1, ZIP Code Directory


Future Associates: workbook, pen and pencils

PRESENTATION

1. Facilitator will explain the purpose and demonstrate the use of the following:

- **Manuals** (contain the basic policies and instructions of the Postal Service.)


DMM – DOMESTIC MAIL MANUAL
IMM – INTERNATIONAL MAIL MANUAL
ASM – ADMINISTRATIVE SUPPORT MANUAL
POM – POSTAL OPERATIONS MANUAL
F-1 – POST OFFICE ACCOUNTING PROCEDURES
ELM – EMPLOYEE LABOR RELATIONS MANUAL

 *Provide future Associates with definitions of each manual, view Exhibit 3, definition of manuals.*

- **Postal Bulletins**


Current (temporary) instructions and fast issuance of permanent directives are to be placed into appropriate manuals when updated versions are reprinted and released. It contains missing money order list that **must be checked** prior to cashing any postal money order. **This is published bi-weekly.**

Additional information such as stamp information, invalid corporate accounts, and references to military mail information can also be found in the *Postal Bulletin*.


 *Show future Associates a Postal Bulletin and review the format. Emphasize the importance of the Postal Bulletin as their first official notification of changes and updates.*

- **Handbooks and Publications**

Specialized instructions, reference works, training materials, procedures, and brochures that are too specialized, intended for a particular audience or otherwise inappropriate for inclusion in manuals (e.g., *Mailers Companion*, and Pub 32 *Glossary of Postal Terms*). F1 – Post Office Accounting Procedures

 *All the above directives are now available electronically via the USPS Home Page. Retail specific information is now available via the Retail Home page at usps.retail.com.*

- **NATIONAL ZIP CODE DIRECTORY**

 ***Note to Facilitator:** Show future associates how to use National ZIP Code Directory.*

Exercises

Match the directive with the appropriate description

- a. Domestic Mail Manual (DMM)
 - b. International Mail Manual (IMM)
 - c. Postal Bulletin
 - d. None of the above
-
- 1 This manual provides information on acceptance of and mailing requirements for non-domestic mail. B
 - 2 Current instructions and fast issuance of permanent directives to be placed into appropriate manual when updated. C
 - 3 This manual includes information on the postal organization, inspection service, communications, records and release of information, marketing, procurement, and computer-based info systems. D(ASM)
 - 4 This manual contains rules, regulations and instructions regarding the postal services and classes and types of mail. It also includes internal operating procedures, but these procedures are also included in the subject manuals and handbooks. A

Use the directives above to list references for the following:

- 1. Definition of a letter DMM
- 2. Cashing money orders Current Postal Bulletin
- 3. Claims for refunds DMM
- 4. What may be insured DMM
- 5. Can a person mail jewelry to South America IMM
- 6. Address elements DMM

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Module 3:

Establishing a Fixed Credit

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Module 3: Establishing a Fixed Credit

Terminal Objective:

Upon completion of this module, future Associates will be able to demonstrate an ability to obtain, replenish and protect the assigned fixed credit.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Identify fixed credits and describe the Sales and Services Associate's financial responsibility.
- Explain the procedures for establishing a fixed credit.
- Identify and describe the procedures for auditing of fixed credits.
- Explain the procedures for handling audit results.
- Explain the procedure to replenish a fixed credit.
- Explain the security procedures of fixed credits.
- Demonstrate proper procedures for handling cash.
- Describe the Segmented Inventory Accountability (SIA) procedures.

Time Allocated for this Module: 1 Hr.

Instructional Methods: Discussion, Presentation, Demonstration.

Summary of Instructional Plan:

The instructor describes and demonstrates how to obtain, store, and count fixed credits. Future Associates are shown how to account for postal funds and accountable paper, and how to maintain them in a neat and orderly fashion. The instructor demonstrates the procedures for setting up a cash drawer and drawer audits.

Materials Required:


Instructor: Rip Chart, colored markers, PS 3369, 3294, 17, 3977, stamp destruction stock for presentation, play money, PO-130 Handbook, PS Form 3220

Future Associates: Workbook, pens or pencils, colored markers, Handbook PO-130

PRESENTATION

Identify Fixed Credits

A fixed credit is the set amount of stamp stock consigned to you. Fixed credits can consist of accountable paper stock, cash, money orders, Liberty Cash card that is issued to you that will be sold to postal customers. Fixed credits for Sales and Service Associates consist of the following accountable paper items either by using actual postage or Handbook PO-130:

 *Note: Instructor will show examples of the following items or use PO Handbook 130:*


- **Postage stock:**
Postage stamps (including regular, special, commemoratives)
Plain stamped envelopes and stamped cards (Show and explain PS Form 3220)
International Reply Coupons (IRC)
Aerogrammes
- **Nonpostal stamps:**
Migratory bird hunting and conservation stamps
- **Philatelic products:**
Mint sets
Postal Service Guide to US Stamps

Establishing a fixed credit

The amount of a fixed credit you will be issued is determined by the demand of customers in your office and the amount of time you will spend at the retail counter. The credit is established for the total value of your fixed accountability, including the maximum amount of change funds, which you may retain at the end of the tour.


Replenish a fixed credit.

The stamp stock is replenished on an as needed basis or on a schedule set by your office which is usually weekly. Stamp stock is ordered using PS Form 17.

 **Note to Facilitator:** Pass out PS Form 17 to future Associates.


When stamp stock is given to the Sales and Services Associate, it must be verified by counting and listing each item on the back of the PS Form 17. Once this is done, the Sales and Services Associate will sign PS Form 17 accepting stock and then will enter this information into the IRT/POS ONE.

Audit of fixed credits

 **Note to Facilitator:** Hand out PS Form 3294 and discuss proper completion of this form.

Audit must be completed at least once every 4 months. Inventory must be completed with Sales and Services Associate and immediate supervisor. Independent counts must be done. The cash portion of the Sales and Services Associate's accountability should be \$100.00 or 10% of the credit, whichever is less.

Audit results

 **Note to Facilitator:** Provide Sales and Services Associates with the definition of tolerance (the amount plus or minus a clerk is allowed to be off in their credit without requiring any action to be taken).

- The tolerance of a stamp credit is based upon the amount entered on the employee's PS Form 3369 or closing balance of the PS Form 1412.
- When an out of tolerance overage occurs, the amount must be placed into trust.
- When an out of tolerance shortage occurs, the amount must be placed into suspense. If the amount of the shortage is out of tolerance, a letter of demand must be issued and the amount of the shortage must be collected.

Explain the security procedures of fixed credits.

Equipment assigned to be used to protect stock or funds (ie., locked containers or vaults) must be examined by the supervisor and the employee to determine that it provides proper safekeeping. If container is not secure, supervisor must report it and secure the stock until the proper equipment is received. Any sign of wear, tear, or damage should be reported to your immediate supervisor.

***Note to Facilitator: Emphasize the following:***

- Fixed credits must be placed in a locked container and stored in a security container, safe, or vault, following the end of your tour of duty.
- No one should have access to the fixed credit of another employee.
- You must be granted the opportunity to be present whenever your fixed credit is inventoried or examined. If you are not available, there must be a witness of your choice present. You must submit to the manager/postmaster two names of employees you select to represent you in your absence. The names are entered on PS Form 3977.

Levels of Security

- 2> Ensure that the descending levels of security in your installation are followed.

Level	Equipment
1	Burglar-resistant chests in fireproof safes or security containers located in walk-in vaults.
2	USPS standard vaults or security containers.
3	Security chests or burglar-resistant chest portion of fireproof safes.
4	Fireproof safes or vaults not built to USPS standards.
5	Lockable metal cabinets and file drawers.

Handbook F-1


Protecting the Stamp Credit

Priorities of Protection

Certain items must be given priority of protection over others, and postmasters are responsible for making sure that the protective equipment is on hand for providing maximum security. The following are priorities of protection:

Priority	Item
1	Postal funds
2	Postage stamps, aerogrammes, international reply coupons, migratory-bird hunting and conservation stamps (bird stamps), philatelic, and blank money order forms.
3	Stamped envelopes and postal cards, money order imprinters, nonsalable stamp stock, and nonpostal items.

Procedures for handling cash.

 **Note to Facilitator:** Explain that when making change, the future Associate cannot just rely on retail equipment to determine the amount of change to be given back to the customer. future Associates should be instructed on counting back change from the smallest coin up to the tendered amount.

Exercises:

1. Customer pays for a book of stamps with a \$50.00 bill. Have participants count back the change to the customer.
2. Customer pays for postage and mailing transaction that totals \$32.29. Customer tenders \$40.50. Have future Associates count back change to the customer.

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Module 4A:

IRT (Unisys)

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Module 4A: IRT (Unisys)

Terminal Objective

Upon the conclusion of this module, future Associates will demonstrate basic IRT skills necessary to conduct transactions and to complete the final daily clerk report (PS1412A).

Enabling Objectives:

Upon the completion of this module, future Associates will be able to:

- Demonstrate safety practices and procedures.
- Explain the function of each IRT component.
- Explain action to be taken in case of component system failure.
- Identify different key groups/special keys.
- Demonstrate proper handling of diskettes.
- Demonstrate IRT/PVI start-up procedures log on ID

Time Allocated for Module: 2 hours

Instructional Methods: Discussion, Presentation, Demonstration

Summary of Instructional Plan:

The facilitator introduces the module by summarizing the topics to be covered. The instructor discusses and describes the features and components of the IRT.

Materials Required:

Instructor: IRT, rip chart, colored markers

Future Associates: workbook, pens or pencils, and colored markers.

PRESENTATION:

The Integrated Retail Terminal (IRT)

The facilitator will explain that the IRT is a disk driven computer-type system (it is not a PC) that will automatically calculate and display postage and add fees for you. The appropriate rates and fees are stored in the memory on the IRT disk. The IRT is not an “on-line” system in that it is not attached to a network. Therefore, any updates to information (such as new rates or regulations) are accomplished via diskette.

The IRT provides:

- Automatic entry of amounts in the proper Account Identifier Code (AIC) through dedicated keys.
- Automatic local express mail network and directory information.
- Automatic building of express mail label lists.
- Automatic building of Delivery Confirmation list.
- Automatic entry of money order fees.
- Automatic entry of permit fees.
- Automatic building of domestic money order list.
- Automatic building of check list.
- Automatic conversion of ZIP code to postal zone.
- Automatic calculation of domestic and international postal rates.
- Consolidation of clerk's PS Form 1412A to the Unit 1412.
- Consolidation of clerk's lists.
- Conversion of express mail data to Scanner database.
- Conversion of Delivery Confirmation to database.
- System-generated PS Forms 3544 and 3603.

Benefits of the IRT

The IRT allows the Sales and Services Associate to handle customer business with greater efficiency. The design of the IRT provides the Sales and Services Associate and customer with many benefits.

Sales and Services Associate Benefits:

- Perform multiple customer transactions and keep a running total of the amount due.
- Automatically calculate the amount of change due the customer.
- Perform standardized transactions.
- Reduce mathematical errors.
- Record the complete day's business.
- Produce a system-generated PS Form 1412A, eliminating the need for a manual PS Form 1412A and the time it would take to prepare it.
- Produce system-generated receipts versus manual receipts.

Customer Benefits

- See transactions on customer monitor.
- Receive automated receipts.
- Receive faster, accurate, and more efficient service.

System Components

The facilitator will discuss how IRT users access the IRT with a diskette. Used in conjunction with the IRT is the Postage Validation Imprinter (PVI).

The hardware components that make up the IRT include:

- Keyboard
- Central Processing Unit (CPU)
- Disk Drive
- Scale
- Clerk Display Screen
- Customer Display Screen
- Bar Code Reader Wand
- Customer Receipt/Report Printer

The **Keyboard** is used to enter the selected function into the IRT. The keyboard is the communication link between you, the user, and the IRT. The IRT system carries out a particular command only after the user has provided keyboard input. The IRT responds to the keyboard input by performing the requested function or by prompting for more specific instructions.

The **Scale** is combined with the CPU and used to automatically calculate the weight of an article and enter it into the IRT. The weight and the amount due is displayed for the customer and the future Associate.

The **Clerk Display Screen** (the large 12" screen) displays to the future Associate the data pertaining to the selected function along with instructions for that particular function.

The **Customer Display Screen** (the small 7" screen) displays to the customer the same information that is displayed on the future Associate's display screen.

The **Bar Code Reader Wand** is hand held and used to scan (read) into the IRT the express mail label number or delivery confirmation, and is also able to scan (read) the bar code on money order packets when performing the money order set up function. Future postal products and services will feature bar codes that this reader wand will use to scan (read) into the IRT.


The **Receipt/Report Printer** prints a receipt for the customer and prints reports and lists for the Sales and Services Associate.

The **Keyboard** is divided into four distinct functional groupings, with color coding for easy recognition. The functional groupings are:

- Accounting
- Postal rate
- Keyboard Control/Support Keys
- Numeric/Calculator

Most of the keys on the IRT keyboard are dedicated function keys. This means they access specific functions, such as post office to addressee express mail, or postage sales. Other keys, such as the shift key, provide support to other major functions. The keys in the top three rows also contain lights. Some of these keys light up when a key has been pressed as part of a transaction. Others flash as a reminder to press a key or make a selection.

The four keyboard function groups and the purposes of each are described as follows:

 *Explain and demonstrate the location of each functional groups keys as they appear on the keyboard.*

Accounting Keys

The accounting function keys (most of which are white; five are red) are located on the bottom four rows of keys— the two exceptions being the white MISC postage key, on the top row, second from right side, and the red start of day key located on the top row, upper right corner of the keyboard. These keys are called accounting function keys because the functions they access keep track of the receipt or disbursement of money exchange for goods or services.

Certain accounting keys serve administrative accounting purposes, such as setting up money orders or correcting errors. Most of the accounting keys, however, are used to process funds received or disbursed. Most of the keys in the accounting section are dedicated keys. In general, pressing these keys causes the system to prompt for an entry to be made by the Sales and Services Associate (i.e., an amount or a serial number).

White Accounting Keys (Explain and Demonstrate)

Red Accounting Keys (Explain and Demonstrate)

Postal Rate Keys

Postal rate keys include the domestic, international, and express mail functions as well as their special services. The color of the postal rate keys is either gray (for domestic mail classes and for special services) or blue (for international).

Gray (Domestic Mail Services) Postal Rate Keys (Explain and Demonstrate)

Blue (International Mail Services) Postal Rate Keys (Explain and Demonstrate)

Red Control/Support Keys

The control/support keys either provide access to various function levels of the other keys or set the mode of operation. Pressing the CALC key activates the calculator function. All of the control/support keys are red, except the ZIP/INT'L code key, which is blue.

Numeric/Calculator Keys

The Numeric/Calculator keys are used for entering numbers or dollar amounts and for carrying out arithmetic operations when in the Calculator mode. All of these keys are gray and are located at the lower right corner of the keyboard and resemble an adding machine keypad. Several keys and some features about the keyboard should be understood. We will discuss other features and keys of the IRT as we use them.

Features

- If you press a key for a function that is not allowed, you will hear a “beep”. This indicates an incorrect selection. Stop and select the correct function.
- Prompts displayed on the monitor will tell you what action to take next, such as:
 - Press enter key to continue.
 - Press total to complete customer transaction.

It is extremely important to read the notices displayed. The screen displays will prompt you to make the correct response to complete your transaction.

Specific Keys

Total key: pressing this key the first time starts the payment process. However, if the customer should request another service or product, simply access that function and the system will add that transaction to the existing list. Pressing the total key a second time completes the payment process if the customer is paying with cash. Prompts will appear on the display screen.

Check received key: when a customer indicates that the transaction is complete, press the total key to begin payment processing. If a check for the exact amount due is received, press the check received key. The check will be entered in the check list and the payment process will be completed. When a check, travelers check or postal money order is tendered and is not in the exact amount due, first handle the transaction as cash tendered. Then, after the customer's transaction is complete, manually enter the amount of the check. Simply press check received, enter the amount, and press enter. Use the check received key to enter cashed postal money orders or to manually enter checks into the check list that were not entered using the payment processing method. When the check received key is used, the amount of the funds is removed from the cash portion of the clerk's funds available. Therefore, when the clerk gives a customer \$100.00 for cashing a postal money order, the clerk is not required to have that \$100.00 in cash, but he/she is required to have that \$100.00 in check form (i.e. Postal money order, travelers check, treasury check).

Bank card key: when a customer indicates that the transaction is complete, press the total key to begin payment processing. If a credit card or debit card is received, press the bank card key. The IRT will prompt for the choice. Make the appropriate selection to complete payment processing.

Reset key: use this key to clear the previous customer's transaction items from the screen and reset the system for the next transaction. It will not clear any items from the screen that have not been totaled. You can also use this key to clear a function in progress if the function has not been completed (must be done before pressing enter)

CE key: if you key in an amount erroneously and detect the error before pressing the enter key, simply press the ce (clear entry) key to remove the incorrect amount; then key in the correct amount. Remember, you must do this before pressing the enter key.

Receipt key: a customer receipt may be printed by pressing this key at the end of the transaction but before a new customer or transaction. If the customer walks away from the counter without obtaining a receipt and you begin a transaction on the IRT for the next customer, the previous customer cannot now receive an IRT receipt. You will need to produce a manual cash receipt, PS Form 1096, if the customer requires a receipt.

Print on/off key: this key turns the printer on and off. Leave it in the on position unless your supervisor instructs you otherwise. This key does not turn the printer power on/off. It only controls the ability of the printer to print. This is a push-on (light on) or push-off (light off) switch. When the light in the key is on, the printer will print every transaction. When the light is off, the printer will still print accounting receipts, customer receipts, support lists, and PS Forms 1412. It will not journal print when in the off position.

Alpha key: some functions require that you use the alpha key. The alpha key is used in conjunction with the ZIP/INT'L code key to move to the next screen for international express mail or APO/FPO destinations that have numerous locations served.

Shift key: use this key in conjunction with other keys to perform certain functions. For example; to print a final PS Form 1412, you must hold down the shift key and press the end duty tour key; then release both keys.

WGT entry key: use this key to manually enter a weight into the IRT (nothing on the scale). This key is not used during an actual transaction; you would use the auto weighing feature. However, you can use the WGT entry key to answer inquiries about rates without actually weighing a mail piece or to enter missed express mail labels under the express COLL mode key or error correct key.

Postage due w/d key: this key is used only by those clerks designated to withdraw funds from trust accounts. This is generally a business reply clerk but may be a Sales and Services Associate.

Cash retained key: use this function to move the “cents” of the cash portion of the deposit from AIC 752, cash remitted final, to AIC 753, cash retained today. The amount entered into AIC 753 for the current day will be reflected in AIC 353, cash retained from previous report, on the next working day. This amount is normally less than one dollar but can be more if a clerk is designated to retain cash.

Alphabet

When the system determines that it is necessary for you to enter letters of the alphabet (i.e., when a customer meter receipt or PS Form 3544 is issued), it automatically changes to the alpha mode. The top row of keys is used to enter A through N and the third row of keys is used to enter O through Z and to space or backspace (space and backspace). You do not have to hold down any other key to access the alphabet. You may use numbers in conjunction with the alpha characters. You may use the decimal point on the numeric keypad as a period and you may use any of the math symbols (if you choose to) with the alpha keys.

Diskettes

A diskette will be assigned to each Sales and Services Associate. The diskette will be identified by a 6 digit ID number. The supervisor will assign the first 2 digits, which will identify your personal Sales and Services Associate number. The additional 4 digits will be chosen by you and will be "secret". You will not disclose these numbers to anyone. This will identify more closely with you as your particular Sales and Services Associate ID. For example, you are assigned as Sales and Services Associate #04 and your secret 4 digit number is 1231. Anyone can know the first 2 digit number but the last 4 digits are to remain secret. The six-digit number is recorded electronically onto your diskette when it is initialized. This prevents anyone else from using your disk.

You will write your secret four-digit number on a blank card or piece of paper supplied by your supervisor. You will need to use a number that you will not forget. You will then place it into a duplicate key envelope, PS Form 3977. The normal procedure for security of PS Form 3977 will be followed. This procedure is to protect the confidentiality of your particular number.

After signifying two witnesses on the envelope, you and a witness, usually the supervisor, will sign the envelope after it is sealed. The envelope will then be postmarked as instructed on the form. You will submit this envelope to the custodian of all the PS Forms 3977. These will be stored in a secure location.

If you do forget your ID, request the envelope from the custodian of the forms. Once the envelope has been opened, a new envelope must be prepared and previous procedures followed. Remember, it is part of the requirements of your job to remember your ID. Pick numbers that you will remember, and remember also, no one else is supposed to know your secret ID number.

The following proper diskette care and handling procedures must always be observed. Do not move the sliding metal door to expose or touch the magnetic disk material. The tiniest scratch or fingerprint can make the disk unusable. Any foreign matter can cause damage to the magnetic material. Do not attempt to clean a diskette. It is enclosed in a self-cleaning shell. Do not open the sealed shell. Keep diskettes away from sunlight and sources of heat. Keep diskettes away from magnets or magnetic fields. Disks should not be exposed to temperatures below 50 f or above 125 f . If the disk has been exposed to these extreme temperatures it is advisable that a new disk be initialized by the supervisor. Do not place heavy objects on diskettes and keep diskettes away from dirt and liquids. There should never be any liquids of any sort near the IRT. Finally, notice that on the back of the diskette is a small square switch. It is used to allow or to prevent the recording of new information. The two positions for this switch are write enable and write protect. The diskette is write protected when the switch is down, revealing a small square of open space just above the switch.

When you use a diskette for daily IRT operations, the switch must be in the write enable position so that customer transaction can be recorded as they occur. If the switch is in the write protect position, when the system attempts to record a customer transaction, an error message will be displayed.

It is wise to check your disk before beginning your day to verify that the diskette is in the write enable position. However, if you get an error message that the diskette is write protected, remove the diskette, change the switch setting, and return the diskette to the disk drive. Press the enter key to record the current and subsequent customer transactions.

Safety Procedures (Have future Associates read aloud)

As with any job and any equipment you may use on that job, safety is the responsibility of every individual in the US Postal Service. Your supervisor is responsible for instructing personnel in safety practices applicable to the operation of the equipment. In the same manner, it is the responsibility of each individual operating the equipment to understand and observe the safety standards and procedures established by the U.S. Postal Service. The operation of electronic and electrical equipment has several elements of danger. Carelessness can result in injury. You must observe the following precautions:

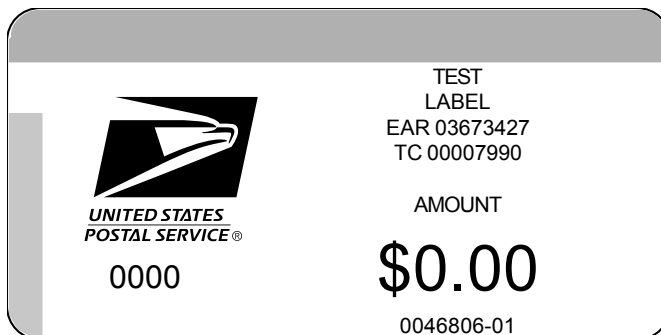
Do not operate equipment without proper authority.

Follow all safety precautions.

- Do not operate unsafe or defective equipment.
- Avoid unsafe acts and conditions.
- Practice good housekeeping.
- Do not engage in horseplay.
- Immediately report all hazardous conditions and operations to your supervisor.
- Keep mentally and physically alert.
- Know the location of the main power shutdown devices.
- Know how to get medical aid.
- Keep clothing, hands, and feet dry.
- Avoid the use of toxic or flammable solvents for cleaning purposes. If there are certain jobs specifically requiring the use of these solvents, you must use protective gear.
- In the event of an electrical fire, use a type c, bc, or abc extinguisher only. Do not use water or any other liquid stream extinguisher, as either presents a shock hazard to the user and will cause considerable damage to electrical equipment.
- Never place food or liquids on or around any part of the equipment.

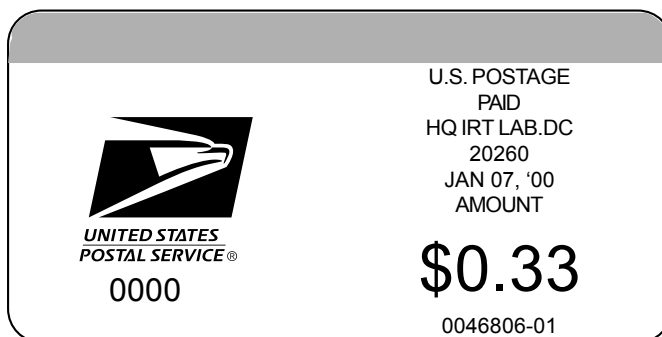
- The IRT system is grounded through the grounding conductor of the power cord. To avoid the danger of electrical shock, make sure the power plug is inserted into a properly wired receptacle.
- Check the power cord before plugging it in. Always use a power cord that is in good condition. A power cord that is frayed or has broken insulation is a shock hazard.
- Do not operate the IRT system without properly installed covers (i.e., without scale platform).
- Always turn the power off when doing any replacement or repair of components.
- Following safety procedures can save you from injury and will prevent lost time for you and the Postal Service.

PVI LABEL DEFINITION



TEST LABEL

Four formats. Obtained by selecting "LABEL" with mode button and pressing paper feed button. Run at start of tour, after clearing a jam and after loading blank labels. NOT to be given away.



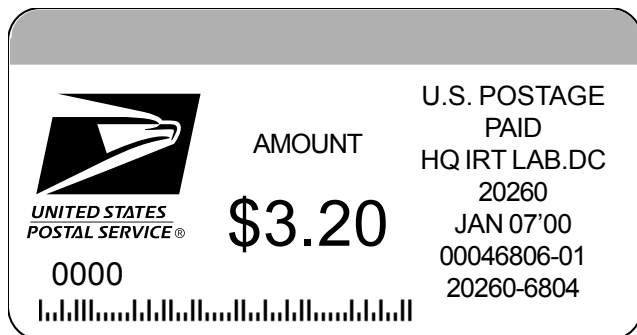
PVI LABEL

No barcode. To be affixed on letters, flats not meeting requirements for POSTNET labels, Express Mail and international mail. Provided automatically for non-POSTNET flats Express Mail and international mail. Can also be obtained by selecting "PO METER" from the "Select Next Function" screen or by selecting "MISC AIC#" and inputting 109.



PVI BARCODE LABEL

5-digit ZIP barcode. To be affixed on domestic parcels and SPRs/IPP. Also acceptable on letters.



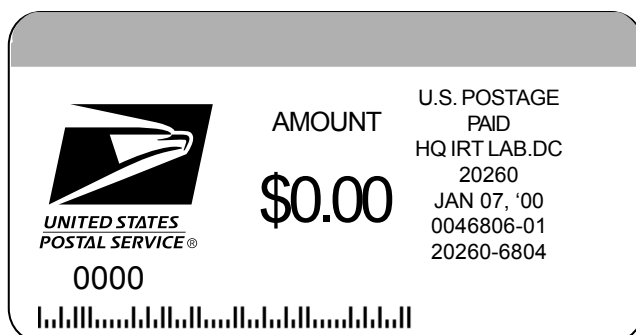
**POSTNET LABEL
ALPHA-F**

5-, 9-, or 11--digit ZIP POSNET Code. To be affixed on all domestic flats EXCEPT those sent Express Mail, registered, certified, (affix PVI no barcode label on these flats). The 11-digit label is not to be used at this time. Obtained by simultaneously selecting "ALPHA" key and "F" key.



DESTINATION ZIP LABEL
ALPHA-Z

5-digit ZIP barcode label with no postage value. May be used for domestic parcels and SPRs/IPP that are presented for mailing with postage already affixed. Obtained by simultaneously selecting “ALPHA” key and “Z” key.



DESTINATION POSTNET LABEL
ALPHA-F / ALPHA-Z

5-, 9-, 11-digit POSTNET label with no postage value. May be used for flats with postage already affixed which are NOT sent Express Mail, Registered, certified, or special delivery (affix no label on these flats). The 11-digit label is not to be used at this time.

IRT/PVI Boot-Up Procedures

- Turn on the PVI. Hold the diskette so that the manufacturer's label is facing up and the arrow is pointing toward the disk drive. Insert the diskette into the IRT drive slot. The diskette will slide easily into the drive. Turn the power on for the IRT.
- When a PVI is attached to the IRT (the PVI and IRT can be plugged into the same power strip) the PVI must be turned on first or the IRT will not boot properly. If the PVI is not turned on and you enter your ID the IRT screen will display an error message: "PVI warning! No PVI response, Correct problem if possible and press enter to retry". If this occurs, turn on the PVI, remove the first label, press enter and remove the next label.
- Near the end of the boot-up the PVI will automatically eject a blank PVI label. If you do not remove the first label right away, you will have an error message on the IRT which reads: "PVI warning! Label not taken or jammed. Correct problem if possible and press enter to retry."
- This may happen often, because you will be busy with other start-up activities while your Sales and Services Associate disk is loading. The error message is not a problem. Simply remove the label. (Sales and Services Associate must generate PVI test labels during start-up. Press the enter key. The IRT will finish booting up.



Note to Facilitator: The facilitator will have each future Associate demonstrate the PVI boot-up procedure.

Run Test Labels

To generate test labels:

1. Press "MODE" button until label appears on PVI display.
2. Press "PAPER FEED" button once.

This will cause the PVI to eject a blank label, and printout the four test labels.

Start of Day

Because the IRT system is designed to protect an individual Sales and Services Associate's accountability, a start of day procedure is required at the start of your tour and at any time you need to be away from your retail counter.



Note to Facilitator: Facilitator will discuss "Start of Day" Print Out.

At the start of day, clerk log on ID screen, key in your six-digit ID using the numeric keypad. The last four digits are displayed on the screen as hyphen so that others cannot see your ID. If you make a mistake while entering your numbers, you can use the CE (clear entry) key to clear the incorrect digits (if you have entered fewer than six digits).

Once you have entered all six digits, the IRT verifies that the ID entered matches the ID on the diskette. If the IDs do not match, an appropriate message is displayed. Pressing the CE key clears the field and allows for re-entry of the ID. If the Sales and Services Associate diskette contains data from the previous day which has not been consolidated, the message will read 'Clerk 1412A not consolidated.' Notify your supervisor. If this occurs, the supervisor will instruct you as to the procedure to follow. Entry of a valid ID completes the log-on process. The start of day report is printed by the receipt printer and displayed on the screen. The opening balances should agree with the previous day's closing balances.

Going on Break and Resuming Duty

If at any time during the day you leave your retail counter (for a break, lunch, etc.) Press the Start of Day key. This will secure your diskette and prevent anyone else from using it. If your IRT is attached to a postage validation imprinter (PVI), a PVI interim register report is printed when you press the "Start of Day" key. You should retain this report as part of your daily activity. You can leave the diskette in the IRT or remove it if instructed to do so, and store it until you return.

Upon return, enter your ID number. A "Resume Day" journal is printed, the next function screen is displayed, and the IRT is ready for use. If you removed your diskette, follow the start-up and start of day procedures.

If the power is turned off while you are away, it will be necessary to reboot the system. Insert your diskette and turn the power on.

In Case of Difficulty

Start of Day

If the IRT does not start when you turn on the power switch, follow these procedures before declaring a system failure:

- Check the power cord. Is it plugged in at the IRT and at the wall plug?
- Check the diskette. Is the diskette damaged? Is it inserted in the drive properly? Is the label side up and is the arrow pointing toward the drive?
- Check the brightness and contrast and controls—located on the bottom left side of the monitor.

Repeat the Start-Up Procedure.

If these procedures do not correct the problem, notify your supervisor. The supervisor will be responsible for performing the necessary diagnostics to determine if the component has failed and is unusable. The supervisor will initiate the necessary action to obtain a replacement. It may be necessary to perform transactions manually until your system is back on-line. Your supervisor will provide you with further direction.



Note to Facilitator: *The facilitator will have each future Associate demonstrate the above mentioned procedures.*

Failure during the business day

Transactions are recorded to diskette as they are completed. Therefore, if a failure occurs during the business day (component failure, power outage, etc.), all data on the diskette will be current up to that time. However, the transaction in progress at the time of the failure will be lost. If this occurs, immediately notify your supervisor. Again, you may have to perform transactions manually until the system is back on-line. After the system is back on-line, you must repeat the start-up procedure before logging on. After you log on, resume operations. Your supervisor will tell you when to enter the transaction data that occurred during the outage.

Correcting errors

The method to be used for correcting errors depends upon when the error is discovered and the AIC involved.

To correct an error before pressing the ENTER key:

If you key in an amount erroneously and detect the error before pressing the ENTER key, simply press the CE key and key the correct amount.

1. To correct an error after pressing the ENTER key (for an AIC without an accountancy receipt):
 - a. Press the function key where the error exists.
 - b. Press the ERROR CORRECT key.
 - c. Enter the amount to be removed.
 - d. Press the ENTER key
2. To correct an error after pressing the TOTAL key (for an AIC without an accountancy receipt):
 - a. Press the FUNCTION key where the error exists.
 - b. Press the ERROR CORRECT key.
 - c. Enter the amount to be removed.
 - d. Press the ENTER key (negative total).
 - e. Press TOTAL to begin payment processing.
 - f. Reenter the transaction correctly, if required.

Note: if there is no function key for the AIC where the error exists, press the MISC AIC # key, enter the AIC number, and follow steps 1 or 2 above.

If you press the wrong function key, press the RESET key to return to the next function screen and select the correct function key.

The IRT allows you to void accountable receipts and list entries for the current tour of duty. To initiate this function, press the RESET key to return to the next function screen and select the correct function key.

The IRT allows you to avoid accountable receipts and list entries for the current tour of duty. To initiate this function, press the SHIFT and then the ERROR CORRECT key. The menu 'INQUIRE-VOID ITEMS' displays receipt and list entries which can be voided. Enter one of the selections to initiate the process of voiding the entry or receipt. (If the transaction was paid for with a check, you must void the check first).

The voids are listed on the daily clerk adjustment list. Once you void a receipt, the amount is automatically subtracted from the applicable AIC.

All entries will appear as negative entries on the daily clerk adjustment list and on the appropriate list for the AIC (i.e., PS Form 3544).

Module 4B:

IRT (MOS)

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Module 4B: IRT (MOS)

Terminal Objective

Upon the conclusion of this module, future Associates will demonstrate basic IRT skills necessary to conduct transactions and to complete the final daily clerk report (PS1412A).

Enabling Objectives:

Upon the completion of this module, future Associates will be able to:

- Demonstrate safety practices and procedures.
- Explain the function of each IRT component.
- Explain action to be taken in case of component system failure.
- Identify different key groups/special keys.
- Demonstrate proper handling of diskettes.
- Demonstrate IRT/PVI start up procedures log on ID

Time allocated for module: 2 hours

Instructional methods: Discussion, Presentation, Demonstration

Summary of Instructional Plan:

The facilitator introduces the module by summarizing the topics to be covered. The instructor discusses and describes the features and components of the IRT.

Materials Required:

Instructor: IRT, Rip Chart, colored markers

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION:

The Integrated Retail Terminal (IRT)

The facilitator will explain that the IRT is a disk driven computer-type system (it is not a PC) that will automatically calculate and display postage and fees for you. The appropriate rates and fees are stored in the memory on the IRT disk. The IRT is not an “on-line” system in that it is not attached to a network. Therefore, any updates to information (such as new rates or regulations) are accomplished via diskette.

The IRT provides:

- Automatic entry of amounts in the proper Account Identifier Code (AIC) through dedicated keys.
- Automatic local Express Mail network and directory information.
- Automatic building of Express Mail label lists.
- Automatic entry of money order fees.
- Automatic entry of permit fees.
- Automatic building of domestic money order list.
- Automatic building of Check list.
- Automatic conversion of ZIP Code to postal zone.
- Automatic calculation of domestic and international postal rates.
- Consolidation of clerk’s PS Form 1412A to the Unit 1412.
- Consolidation of clerk’s lists.
- Conversion of Express Mail Data to Scanner database.
- System-generated PS Forms 3544 and 3603.

Benefits of the IRT

The IRT allows the Sales and Services Associate to handle customer business with greater efficiency. The design of the IRT provides the Sales and Services Associate and customer with many benefits.

Sales and Services Associate Benefits

- Perform multiple customer transactions and keep a running total of the amount due.
- Automatically calculate the amount of change due the customer.
- Perform standardized transactions.
- Reduce mathematical errors.
- Record the complete day’s business.
- Produce a system-generated PS Form 1412A, eliminating the need for a manual PS Form 1412A and the time it would take to prepare it.
- Produce system-generated receipts versus manual receipts.

Customer Benefits

- See transactions on a monitor.
- Receive automated receipts.
- Receive faster, accurate, and more efficient service.

System Components

The facilitator will discuss how IRT users access the IRT with a diskette. Used in conjunction with the IRT is the Postage Validation Imprinter (PVI).

The hardware components that make up the IRT include:

- Keyboard
- Central Processing Unit (CPU)
- Disk Drive
- Scale
- Clerk Display Screen
- Customer Display Screen
- Bar Code Reader Wand
- Customer Receipt/Report Printer

The **Keyboard** is used to enter the selected function into the IRT. The keyboard is the communication link between you, the user, and the IRT. The IRT system carries out a particular command only after the user has provided keyboard input. The IRT responds to the keyboard input by performing the requested function or by prompting for more specific instructions.

The **Scale** is combined with the CPU and used to automatically calculate the weight of an article and enter it into the IRT. The weight and the amount due is displayed for the customer and the Sales and Services Associate.

The **Clerk Display Screen** (the large 12" screen) displays to the Sales and Services Associate the data pertaining to the selected function along with instructions for that particular function.

The **Customer Display Screen** (the small, 7" screen) displays to the customer the same information that is displayed on the Sales and Services Associate display screen.

The **Bar Code Reader Wand** is hand held and used to scan (read) into the IRT the Express Mail label number, and is also able to scan (read) the bar code on Money Order packets when performing the Money Order Set Up function. Future postal products and services will feature bar codes that this Reader Wand will use to scan (read) into the IRT.

The **Receipt/Report Printer** prints a receipt for the customer and prints reports and lists for the Sales and Services Associate.


Keyboard

The keyboard is divided into four distinct functional groupings, with color coding for easy recognition. The functional groupings are:

- Accounting
- Postal Rate
- Keyboard Control/Support
- Numeric/Calculator

Most of the keys on the IRT keyboard are dedicated function keys. This means they access Specific functions, such as Post Office to Addressee Express Mail, or postage sales. Other keys, such as the SHIFT key, provide support to other major functions. The keys in the top three rows also contain lights. Some of these keys light up when a key has been pressed as part of a transaction. Others flash as a reminder to press a key or make a selection.

The four keyboard function groups and the purposes of each are described as follows:

 *Explain and demonstrate the location of each functional group's keys as they appear on the keyboard.*

Accounting Keys

The accounting function keys (most of which are WHITE; five are RED) are located on the bottom four rows of keys, the two exceptions being the white MISC POSTAGE key, it is at the top row, second from right side, and the red START OF DAY key, which is located on the top row, upper right corner of the keyboard. These keys are called accounting function keys because the functions which they access keep track of the receipt or disbursement of money exchange for goods or services.

Certain accounting keys serve administrative accounting purposes, such as setting up money orders or correcting errors. Most of the accounting keys, however, are used to process funds received or disbursed. Most of the keys in the accounting section are dedicated keys. In general, the pressing of these keys causes the system to prompt for an entry to be made by the Sales and Services Associate (i.e., an amount or a serial number).

White Accounting Keys (Explain and Demonstrate)

Red Accounting Keys (Explain and Demonstrate)

Postal Rate Keys

Postal rate keys include the domestic, international, and Express Mail functions as well as their special services. The color of the postal rate keys is either GRAY (for domestic mail classes and for special services) or BLUE (for international)

Black (are Domestic Mail Services) Postal Rate Keys (Explain and Demonstrate)

Red (International Mail Services) Postal Rate Keys (Explain and Demonstrate)

Control/Support Keys

The control/support keys either provide access to various function levels of the other keys or set the mode of operation. Pressing the CALC key activates the calculator function. All of the control/support keys are RED, except the ZIP/INT'L CODE Key, which is BLUE.

Numeric/Calculator Keys

The numeric/calculator keys are used for entering numbers or dollar amounts and for carrying out arithmetic operations when in the calculator mode. All of these keys are Gray and are located at the lower right corner of the keyboard and resemble an adding machine keypad.

Several keys and some features about the keyboard should be understood. We will discuss other features and keys of the IRT as we use them.

Features

- If you press a key for a function that is not allowed, you will hear a “beep”. This indicates an incorrect selection. Stop and select the correct function.
- Prompts displayed on the monitor will tell you what action to take next, such as:
“Press ENTER key to continue.
Press TOTAL to complete customer transaction.”

It is extremely important to read the notices displayed.

Specific Keys

TOTAL Key: Pressing this key the first time starts the payment process. However, if the customer should request another service or product, simply access that function and the system will add that transaction to the existing list. Pressing the TOTAL key a second time completes the payment process if the customer is paying with cash. Prompts will appear on the display screen.

CHECK RECEIVED Key: When a customer indicates that the transaction is complete, press the TOTAL key to begin payment processing. If a check for the exact amount due is received, press the CHECK RECEIVED key. The check will be entered in the check list and the payment process will be completed. When a check, travelers check or postal money order is tendered and is not in the exact amount due, first handle the transaction as cash tendered. Then, after the customer's transaction is complete, manually enter the amount of the check. Simply press CHECK RECEIVED, enter the amount, and press ENTER. Use the CHECK RECEIVED key to enter cashed postal money orders or to manually enter checks into the Check List that were not entered using the payment processing method. When the CHECK RECEIVED key is used, the amount of the funds is removed from the cash portion of the Sales and Services Associate's funds available. Therefore, when the Sales and Services Associate gives a customer \$100.00 for cashing a Postal Money order, the Sales and Services Associate is not required to have that \$100.00 in cash, but he/she is required to have that \$100.00 in check form (i.e. Postal Money Order, Travelers Check, Treasury Check).

BANK CARD Key: When a customer indicates that the transaction is complete, press the TOTAL key to begin payment processing. If a Credit Card or Debit Card is received, press the BANK CARD key. The IRT will prompt for the choice. Make the appropriate selection to complete payment processing.

RESET Key: Use this key to clear the previous customer's transaction items from the screen and reset the system for the next transaction. It will not clear any items from the screen that have not been totaled. You can also use this key to clear a function in progress if the function has not been completed (must be done before pressing ENTER).

CE Key: If you key in an amount erroneously and detect the error before pressing the ENTER key, simply press the CE (Clear Entry) key to remove the incorrect amount; then key in the correct amount. Remember, you must do this before pressing the ENTER key.

RECEIPT Key: A customer receipt may be printed by pressing this key at the end of the transaction but before a new customer or transaction. If the customer walks away from the counter without obtaining a receipt and you begin a transaction on the IRT for the next customer, the previous customer cannot now receive an IRT receipt. You will need to produce a manual cash receipt, PS Form 1096, if the customer requires a receipt.

PRINT ON/OFF Key: This key turns the printer ON and OFF. Leave it in the ON position unless your supervisor instructs you otherwise. This key does not turn the printer power ON/OFF. It only controls the ability of the printer to print. This is a push-on (light on) or push-off (light off) switch. When the light in the key is ON, the printer will print every transaction. When the light is OFF, the printer will still print accounting receipts, customer receipts, support lists, and PS Forms 1412A. It will not journal print when in the OFF position.

ALPHA Key: Some functions require that you use the ALPHA key. The ALPHA key is used in conjunction with the ZIP/INT'L CODE Key to move to the next screen for International Express Mail destinations that have numerous locations served.

SHIFT Key: Use this key in conjunction with other keys to perform certain functions. For example; to print a Final 1412, you must hold down the SHIFT key and press the END DUTY TOUR key; then release both keys.

WGT ENTRY Key: Use this key to manually enter a weight into the IRT (nothing on the scale). This key is not used during an actual transaction; you would use the auto weighing feature. However, you can use the WGT ENTRY key to answer inquiries about rates without actually weighing a mail piece or to enter missed Express Mail Labels under the EXPRESS COLL MODE key or ERROR CORRECT key.

POSTAGE DUE W/D Key: This key is used only by those Sales and Services Associates designated to withdraw funds from trust accounts. This is generally a Business Reply Clerk but may be a window Sales and Services Associate.

CASH RETAINED Key: Use this function to move the “cents” of the cash portion of the deposit from AIC 752, Cash Remitted Final, to AIC 753, Cash Retained Today. The amount entered into AIC 753 for the current day will be reflected in AIC 353, Cash Retained from Previous Report, on the next working day. This amount is normally less than one dollar but can be more if a Sales and Services Associate is designated to retain cash.

Alphabet

When the system determines that it is necessary for you to enter letters of the alphabet (i.e., when a customer meter receipt or PS Form 3544 is issued), it automatically changes to the alpha mode. The top row of keys is used to enter A through N and the third row of keys is used to enter O through Z and to space or backspace (SPACE and BKSPACE). You do not have to hold down any other key to access the alphabet. You may use numbers in conjunction with the alpha characters. You may use the decimal point on the numeric keypad as a period and you may use any of the math symbols (if you choose to) with the alpha keys.

Diskettes

A diskette will be assigned to each Sales and Services Associate. The diskette will be Identified by a six-digit ID number. The supervisor will assign the first two-digits, which will Identify your personal Sales and Services Associate number. The additional four-digits will be chosen by you and will be “secret”. You will not disclose these numbers to anyone. For example, you are assigned as Sales and Services Associate #04 and your secret 4 digit number is 1231. Anyone can know the first 2 digit number but the last 4 digits are to remain secret. The six-digit number is recorded electronically onto your diskette when it is initialized. This prevents anyone else from using your disk.

You will write your secret four-digit number on a blank card or piece of paper supplied by your supervisor. You will need to use a number that you will not forget. You will then place it into a duplicate key envelope, PS Form 3977. The normal procedure for security of PS Form 3977 will be followed. This procedure is to protect the confidentiality of your particular number.

After signifying two witnesses on the envelope, you and a witness, usually the supervisor, will sign the envelope after it is sealed. The envelope will then be postmarked as instructed on the Form. You will submit this envelope to the custodian of all the PS Forms 3977. These will be stored in a secure location.

If you do forget your ID, request the envelope from the custodian of the forms. Once the envelope has been opened, a new envelope must be prepared and previous procedures followed. Remember, it is part of the requirements of your job to remember your ID. Pick numbers that you will remember, and remember also, no one else is supposed to know your secret ID number.

The following proper diskette care and handling procedures must always be observed. Do not move the sliding metal door to expose or touch the magnetic disk material. The tiniest scratch or fingerprint can make the disk unusable. Any foreign matter can cause damage to the magnetic material. Do not attempt to clean a diskette. It is enclosed in a self-cleaning shell. Do not open the sealed shell. Keep diskettes away from sunlight and sources of heat. Keep diskettes away from magnets or magnetic fields. Disks should not be exposed to temperatures below 50 F or above 125 F . If the disk has been exposed to these extreme temperatures it is advisable that a new disk be initialized by the supervisor. Do not place heavy objects on diskettes and keep diskettes away from dirt and liquids. There should never be any liquids of any sort near the IRT. Finally, notice that on the back of the diskette is a small square switch. It is used to allow or to prevent the recording of new information. The two positions for this switch are Write Enable and Write Protect. The diskette is write protected when the switch is down, revealing a small square of open space just above the switch.

When you use a diskette for daily IRT operations, the switch must be in the Write Enable position so that customer transactions can be recorded as they occur. If the switch is in the Write Protect position, when the system attempts to record a customer transaction, an error message will be displayed.

It is wise to check your disk before beginning your day to verify that the diskette is in the Write Enable position. However, if you get an error message that the diskette is Write Protected, remove the diskette, change the switch setting, and return the diskette to the disk drive. Press the ENTER key to record the current and subsequent customer transactions.

Safety Procedures (Have future Associates read aloud)

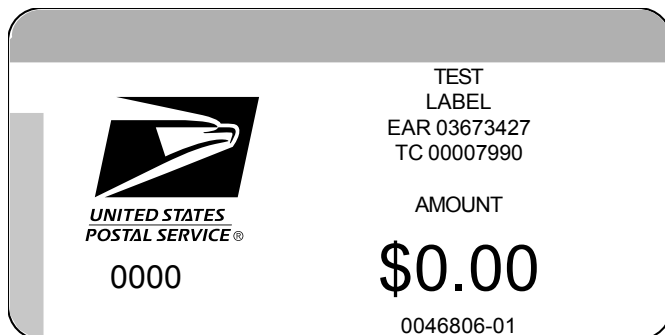
As with any job and any equipment you may use on that job, SAFETY is the responsibility of every individual in the U.S. Postal Service. Your supervisor is responsible for instructing personnel in safety practices applicable to the operation of the equipment. In the same manner, it is the responsibility of each individual operating the equipment to understand and observe the safety standards and procedures established by the U.S. Postal Service.

The operation of electronic and electrical equipment has several elements of danger. Carelessness can result in injury. You must observe the following precautions:

- Do not operate equipment without proper authority.
- Follow all safety precautions.
- Do not operate unsafe or defective equipment.
- Avoid unsafe acts and conditions.
- Practice good housekeeping.
- Do not engage in horseplay.
- Immediately report all hazardous conditions and operations to your supervisor.
- Keep mentally and physically alert.
- Know the location of the main power shutdown devices.
- Know how to get medical aid.
- Keep clothing, hands, and feet dry.
- Avoid the use of toxic or flammable solvents for cleaning purposes. If there are certain jobs specifically requiring the use of these solvents, you must use protective gear.
- In the event of an electrical fire, use a Type C, BC, or ABC extinguisher only. Do Not use water or any other liquid stream extinguisher, as either presents a shock hazard to the user and will cause considerable damage to electrical equipment.
- Never place food or liquids on or around any part of the equipment.
- The IRT system is grounded through the grounding conductor of the power cord. To avoid the danger of electrical shock, make sure the power plug is inserted into a properly wired receptacle.
- Check the power cord before plugging it in. Always use a power cord that is in good condition. A power cord that is frayed or has broken insulation is a shock hazard.
- Do not operate the IRT System without properly installed covers (i.e. without scale platform).
- Always turn the power off when doing any replacement or repair of components.

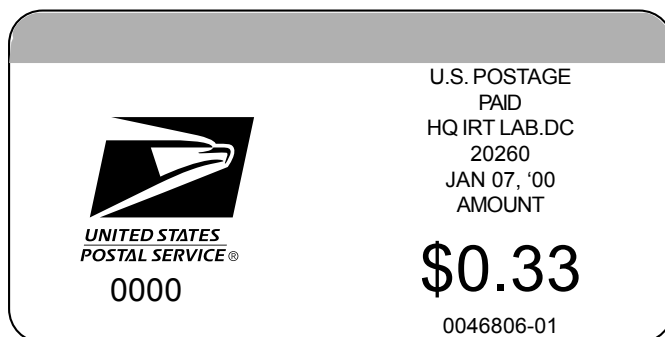
Following safety procedures can save you from injury and will prevent lost time for you and the Postal Service.

PVI LABEL DEFINITION



TEST LABEL

Four formats. Obtained by selecting "LABEL" with mode button and pressing paper feed button. Run at start of tour, after clearing a jam and after loading blank labels. NOT to be given away.



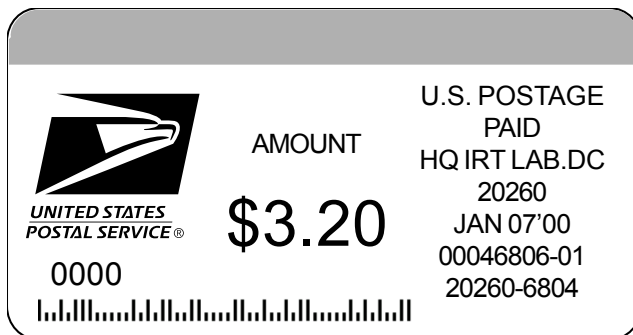
PVI LABEL

No barcode. To be affixed on letters, flats not meeting requirements for POSTNET labels, Express Mail and international mail. Provided automatically for non-POSTNET flats Express Mail and international mail. Can also be obtained by selecting "PO METER" from the "Select Next Function" screen or by selecting "MISC AIC#" and inputting 109.



PVI BARCODE LABEL

5-digit ZIP barcode. To be affixed on domestic parcels and SPRs/IPP. Also acceptable on letters.



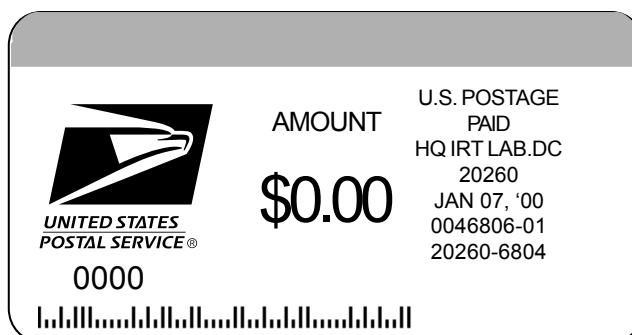
POSTNET LABEL ALPHA-F

5-, 9-, or 11--digit ZIP POSNET Code. To be affixed on all domestic flats EXCEPT those sent Express Mail, registered, certified, (affix PVI no barcode label on these flats). The 11-digit label is not to be used at this time. Obtained by simultaneously selecting "ALPHA" key and "F" key.



DESTINATION ZIP LABEL ALPHA-Z

5-digit ZIP barcode label with no postage value. May be used for domestic parcels and SPRs/IPP that are presented for mailing with postage already affixed. Obtained by simultaneously selecting "ALPHA" key and "Z" key.




DESTINATION POSTNET LABEL ALPHA-F / ALPHA-Z

5-, 9-, 11-digit POSTNET label with no postage value. May be used for flats with postage already affixed which are NOT sent Express Mail, Registered, certified, or special delivery (affix no label on these flats). The 11-digit label is not to be used at this time.

PVI Boot-Up Procedures

- Turn on the PVI. Hold the diskette so that the manufacturer's label is facing up and the arrow is pointing toward the disk drive. Insert the diskette into the IRT drive slot. The diskette will slide easily into the drive. Turn the power on for the IRT.
- When a PVI is attached to the IRT. (the PVI and IRT can be plugged into the same power strip) the PVI must be turned on first or the IRT will not boot properly. If the PVI is not turned on and you enter your ID the IRT screen will display an error message, 'PVI WARNING! NO PVI RESPONSE. CORRECT PROBLEM IF POSSIBLE and PRESS ENTER TO RETRY' If this occurs, turn on the PVI, remove the first label, press ENTER and remove the next label.
- Near the end of the boot-up the PVI will automatically eject a blank PVI label. If you do not remove the first label right away, you will have an error message on the IRT which reads "PVI WARNING! LABEL NOT TAKEN OR JAMMED. CORRECT PROBLEM IF POSSIBLE and PRESS ENTER TO RETRY".
- This may happen often, because you will be busy with other start-up activities while your Sales and Services Associate's Disk is loading. The error message is not a problem simply remove the label. (Sales and Services Associates must generate PVI test labels during start up). Press the ENTER key. The IRT will then finish booting up.

 *The facilitator will have each future Associate demonstrate the PVI boot up procedure.*

Run Test Labels

To generate test labels:

1. Press "MODE" button until label appears on PVI display.
2. Press "PAPER FEED" button once.

This will cause the PVI to eject a blank label, and printout the four test labels.

Start of Day

Because the IRT System is designed to protect an individual Sales and Services Associate's accountability, a START OF DAY procedure is required at the start of your tour and at any time you need to be away from your retail counter.



Note to Facilitator: Facilitator will discuss “Start of Day” print out

At the START OF DAY, CLERK LOGON ID screen, key in your six-digit ID using the numeric keypad. The last four digits are displayed on the screen as hyphens so that others cannot see your ID. If you make a mistake while entering your numbers, you can use the CE (Clear Entry) key to clear the incorrect digits (if you have entered fewer than six digits).

Once you have entered all six digits, the IRT verifies that the ID entered matches the ID on the diskette. If the IDs do not match, an appropriate message is displayed. Pressing the CE key clears the field and allows for re-entry of the ID.

If the Sales and Services Associate diskette contains data from the previous day which has not been consolidated, the message will read ‘CLERK 1412A NOT CONSOLIDATED. NOTIFY YOUR SUPERVISOR’. If this occurs, the supervisor will instruct you as to the procedure to follow.

Entry of a valid ID completes the log-on process. The START OF DAY report is printed by the receipt printer and displayed on the screen. The opening balances should agree with the previous day’s closing balances..



Note to Facilitator: The facilitator will have each future Associate demonstrate the Start Of Day procedures.

Going on Break and Resuming Duty

If at any time during the day you leave your retail counter (for a break, lunch, etc.) press the START OF DAY key. This will secure your diskette and prevent anyone else from using it. If your IRT is attached to a Postage Validation Imprinter (PVI), a PVI Interim Register Report is printed when you press the START OF DAY key. You should retain this report as part of your daily activity. You can leave the diskette in the IRT, instructed to do so, or remove it and store it until you return. Upon return, enter your ID number. A “Resume Day” journal is printed, the Next Function screen is displayed, and the IRT is ready for use. If you removed your diskette, follow the Start-Up and START OF DAY procedures. If the power is turned OFF while you are away, it will be necessary to reboot the system. Insert your diskette and turn the power ON.

In Case of Difficulty

Start of Day

If the IRT does not start when you turn on the power switch, follow these procedures before declaring a system failure:

- Check the power cord. Is it plugged in at the IRT and at the wall plug?
- Check the diskette. Is the diskette damaged? Is it inserted in the drive properly? Is the label side up and is the arrow pointing toward the drive?
- Check the brightness and contrast and controls-located on the bottom left side of the monitor.

Repeat the Start-Up Procedures

If these procedures do not correct the problem, notify your supervisor. The supervisor will be responsible for performing the necessary diagnostics to determine if the component has failed and is unusable. The supervisor will initiate the necessary action to obtain a replacement. It may be necessary to perform transactions manually until your system is back on-line. Your supervisor will provide you with further direction.

Failure During the Business Day

Transactions are recorded to diskette as they are completed. Therefore, if a failure occurs during the business day (component failure, power outage, etc.) all data on the diskette will be current up to that time. However, the transaction in progress at the time of the failure will be lost. If this occurs, immediately notify your supervisor. Again, you may have to perform transactions manually until the system is back on-line. After the system is back on-line, you must repeat the START-UP procedure before logging on. After you log on, resume operations. Your supervisor will tell you when to enter the transaction data that occurred during the outage.

Correcting Errors

The method to be used for correcting errors depends upon when the error is discovered and the AIC involved.

To correct an error before pressing the ENTER key:

If you key in an amount erroneously and detect the error before pressing the ENTER key, simply press the CE key and key the correct amount.

1. To correct an error after pressing the ENTER key (for an AIC without an accountancy receipt):
 - a. Press the function key where the error exists.
 - b. Press the ERROR CORRECT key.
 - c. Enter the amount to be removed.
 - d. Press the ENTER key

2. To correct an error after pressing the TOTAL key (for an AIC without an accountancy receipt):
 - a. Press the function key where the error exists.
 - b. Press the ERROR CORRECT key.
 - c. Enter the amount to be removed.
 - d. Press the ENTER key (negative total).
 - e. Press TOTAL to begin payment processing.
 - f. Reenter the transaction correctly, if required.

Note: If there is no function key for the AIC where the error exists, press the MISC AIC # key, enter the AIC number, and follow steps 1 or 2 above.

If you press the wrong function key, press the RESET key to return to the Next Function screen and select the correct function key.

The IRT allows you to void accountable receipts and list entries for the current tour of duty. To initiate this function, press the RESET key to return to the Next Function screen and select the correct function key.

The IRT allows you to void accountable receipts and list entries for the current tour of duty. To initiate this function, press the SHIFT and then the ERROR CORRECT key. The menu "INQUIRE-VOID ITEMS" displays receipt and list entries which can be voided. Enter one of the selections to initiate the process of voiding the entry or receipt. (If the transaction was paid for with a check, you must void the check first).

The voids are listed on the daily clerk adjustment list. Once you void a receipt, the amount is automatically subtracted from the applicable AIC.

All entries will appear as negative entries on the daily clerk adjustment list and on the appropriate list for the AIC (i.e., PS Form 3544).

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Module 4C:

POS ONE - NCR

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Module 4C: POS ONE – NCR

Terminal Objective:

At the conclusion of this training module future Associates will demonstrate basic POS ONE skills necessary to perform basic navigation through the POS ONE system.

Enabling Objectives:

Upon completion of this module future Associates will be able to:

- Explain the features and benefits.
- Explain the function of each POS ONE component.
- Explain hardware maintenance.
- Demonstrate safety practices and procedures.
- Demonstrate start of day functions.
- Demonstrate end of day functions.
- Identify terms and basic screen set up.
- Explain and demonstrate how to use Quick Reference Guide.

Time Allocated for Module: 2 hours

Instructional Methods: Discussion, Presentation, Demonstration, Hands On Exercises

Summary of Instructional Plan:

The facilitator introduces the module by summarizing the topics to be covered. The facilitator describes the benefits and features of the POS ONE. The facilitator identifies and describes the hardware used in the POS ONE.

Materials Required:

Instructor: POS One Terminal, Rip Chart, colored markers, POS ONE Quick Reference Guide

Future Associates: Workbook, pens or pencils, and colored markers

PRESENTATION

POS stands for point of service - it's a retail workstation.

ONE indicates this is the first of its type. There are several specific features that will make POS ONE easier to use:

- A user-friendly keypad.
- An all-purpose scanning device for special service labels and product scanning.
- the cost of every postal product and service is built into it and allows ease in upgrading.
- A multi-purpose receipt printer, money order imprinter, and bank stamp imprinter for checks.
- Remote system monitoring, which allows network updates to the DMM, IMM, and express mail network.

Benefits of POS ONE include:

- Introduces a state-of-the-art system that is committed to customer service by supporting voice of the employee, providing complete, consistent, and effective communication with retail clerks.
- Supports voice of the customer and voice of the business.
- Provides simple to use with an easy-to-read keypad and clerk display monitor.
- Provides quicker and more efficient customer service.
- Provides accurate and up-to-date information on all rates and services.
- Provides detailed sales order information, improving availability of stamps and other products.
- Provides easy ZIP code and ZIP+4 access.
- Provides up-to-date data on APO/FPO restrictions.
- Provides on-line help screens throughout the system.
- Eliminates dual systems in postal stores.
- Eliminates personal floppy disks.
- Eliminates the need for manual surveys and sample studies.
- Prints all Money Orders, reducing the chance for errors.
- Decreases transaction time for Money Orders, customer meters, and trust accounts.
- Holds the DMM and IMM.

POS ONE is more efficient than your present system with its ability to add and upgrade system features. Because of built-in postal rules, POS ONE will help reduce or even eliminate human errors. The customers' options are displayed on a screen allowing them to make quick comparisons of price and value. The system prints out forms that previously were completed manually.

Network

The POS ONE tallies each transaction and builds a data file. When you close out, it automatically transfers the record through a series of cables to a central file at the post office via a local area network (LAN). No more disks to worry about! The LAN server at your post office hooks up to a nationwide database network called WAN, for wide area network. From a central computer, the WAN also sends out automatic software updates of rules, ZIP codes, APO's, rates and embargoes. In the future you will be able to check for lost or stolen money orders, credit cards, and bad checks. The data generated during the course of each transaction is stored to help track inventory and to generate reports.

Components of the POS ONE system

Central Processing Unit (CPU) – it is the “brain” of the system where information is stored. The hard drive records and tracks your daily transactions, then transfers the information to the central controller terminal. Diskettes are no longer needed. The terminals should be kept powered at all times to receive update information. Exception: The system can be turned off when performing a weekly orderly shutdown or when instructed by the Help Desk. Follow Back Office Quick Reference Guide (QRG) for shutdown procedures.

Sales and Services Associate Display Monitor – is the main way of communicating with the system. It is adjustable to each person's height and line of vision. Right in the middle of the lower monitor's edge is a half-dark and half-light circle. Slide your finger back under the monitor right there and turn the knob a little. You can adjust the height and angle, too. Reach all the way behind the monitor and loosen the knob to adjust, while using one hand to support the monitor screen. Now lift the monitor to the height you like and twist the knob to lock it in place. Next, you can adjust the angle of the screen. In the future it will be used to accept credit cards.

Number pad –Is part of the keypad on the Sales and Services Associate display monitor. The number pad provides a convenient way for you to enter numeric information (for example, ZIP codes) faster than is possible with the keyboard. Notice the two keys at the bottom of your keypad on the Sales and Services Associate display monitor. These are scroll keys. The right scroll key is used to access the edit mode.

Static keys – are located on the keypad. Static keys provide a gateway to the major functions that you routinely handle. Static keys remain constant from screen to screen and from function to function.

Dyna keys —are keys located on the right side of the screen and are identified with different options. These labels are associated with the physical keys that are immediately to the right of the screen. They're called “dyna” keys because they're Dynamic. They change, depending on where you are in a given transaction.

Bar code scanner – The NCR POS ONE scanner is a presentation scanner. Either present the bar code to the scanner or if the item is awkward or heavy, present the scanner to the bar code. The light must cross the entire bar code to read it correctly.

The device also captures the date and time of each scan.

CAUTION: The scanner generates a low-level laser light that is harmless to you and your eyes. Never attempt to modify the scanner.

Receipt/Slip Printer – the POS ONE printer has several different functions, including: printing receipts, processing checks and money orders, and printing on forms. The printer actually contains two printers. The receipt printer at the top of the printer prints the customer receipt and reports which are printed on thermal paper. There is no ribbon in the receipt printer, it uses heat to print on the receipt paper. You will be very happy to see how quiet and fast the printer is and in addition, the receipts are automatically printed.

The slip printer uses a special ink to print onto money orders, forms and checks. Forms being printed by this printer are inserted into the slot midway down the front of the printer. The system will prompt you to insert these items into the printer.

The slip printer can read the micr-encoded, preprinted customer account number on the bottom of a check and serial numbers on money order. “MICR” stands for magnetic ink character recognition.

Scale – is used to weigh customer packages and letters. The digital display on the clerk display monitor shows the item weight in pounds and ounces. The scale shows weights as little as a tenth of an ounce and can handle up to 70 pounds. Objects should not be left on the scale when it is not being used as this will cause the scale to lose calibration. Notice the template on top of the scale. This ready reference helps you make decisions regarding surcharges, postcard sizes, flat vs letter sizes, etc. when you are rating mail.

PVI unit – generates mailing labels. It is the same piece of equipment that is currently being used to apply postage to packages and letters.

Cash drawer – is used to store cash and other tender. The drawer will open electronically at the end of appropriate transactions. It is mandatory to use your POS ONE cash drawer.

Customer display unit – faces the customer and displays information about transactions in progress. In the future it will be used to read debit cards, enter customer PIN numbers and capture signatures.

Keyboard – this is a standard computer keyboard with a built-in touch pad. For most transactions you will use the keys on the Sales and Services Associate display monitor (keypad) instead of the keyboard. When the keyboard is not in use, it can be stowed away in the shelf provided. This keeps it out of your way and protects it from dust, spillage and other hazards. There is a small touch pad on the lower right side of the keyboard. This can be used to move the cursor, in a manner similar to a mouse.

Uninterruptible power supply (UPS) – the UPS has a battery that allows you to complete immediate customer transactions and shut down the system without losing any data, if there's a power failure. The system should always be plugged into the UPS box. If power is lost you must complete the current customer transaction and perform an orderly shutdown of the system.

Laser printer – is attached to the controller. It will be used for report printing and other procedures.

Hardware maintenance

There are a few things that you will be asked to do to help keep the equipment clean and running properly. It is extremely important never to use water or cleaner directly on any piece of equipment.

The display units may become dirty or smudged. Lightly spray a soft rag with water and wipe the screens.

Occasionally the equipment will also need to be cleaned. The best way is to lightly spray a soft clean rag with non-abrasive cleaner and gently wipe off the equipment.

When the receipt printer is out of paper, the “paper out” light will turn red and you will need to put in a new roll. The printer uses a thermal paper roll so it is important to load the roll in the correct direction.

Safety practices and procedures

As with any job and any equipment you may use, safety is the responsibility of every individual in the US Postal Service. Your supervisor is responsible for instructing personnel in safety practices applicable to the operation of the equipment. In the same manner, it is the same responsibility of each individual operating the equipment to understand and observe the safety standards and procedures established by the U S Postal Service. The operation of electronic and electrical equipment has several elements of danger. Carelessness can result in injury. You must observe the following precautions:


- Do not operate equipment without proper authority.
- Follow all safety precautions.
- Do not operate unsafe or defective equipment.
- Avoid unsafe act and conditions.
- Practice good housekeeping.
- Do not engage in horseplay.
- Immediately report all hazardous conditions and operations to your supervisor.
- Keep mentally and physically alert.
- Know the location of the main power shutdown devices.
- Always turn the power off when doing any replacement or repair of components.
- Do not operate the POS ONE without properly installed covers. (i.e. without scales platform).
- Check the power plug before plugging it in. Always use a power cord that is in good condition. A power cord that is frayed or has broken insulation is a shock hazard.
- To avoid the danger of electrical shock, make sure the power plug is inserted into a properly wired receptacle.
- Never place food or liquids on or around any part of the equipment.
- Keep clothing, hands and feet dry.
- Avoid the use of toxic or flammable solvents for cleaning purposes. If there are certain jobs specifically requiring the use of these solvents you must use protective gear.
- In the event of a fire, use a type c, bc or abc extinguisher only. Do not use water or any other liquid stream extinguisher, as either presents a shock hazard to the user and will cause considerable damage to electrical equipment.
- Know how to get medical aid.

Following safety procedures can save you from injury and will prevent lost time for you and the Postal Service.


Logging on to POS ONE System

The sign-in procedure provides one of the most valuable features of the new POS ONE system – security. Each of you will have a unique, computer-generated user identification code, referred to as a logon ID. Along with your ID you will have a unique password that you choose, and that no one else knows. The system knows what password should go with your ID...nothing else will unlock the system. While your logon ID remains the same all the time, you control your password and it can be changed, as needed.

To log on you need to use the keyboard. You enter text with the keyboard. You can use the keyboard to enter numbers as well, but you'll find it's easier to use the number pad on the keypad. A critical key is the "caps lock" key. You can locate this key on the left side of the keyboard, at the middle key.

 **Note to the Facilitator:** Have future Associates push the "caps lock" key and release it.

You'll notice that the light under the capital "a" now shows green. That means everything you type will be capitalized. That's important, because you don't want caps lock on when you type your password.


 **Note to the Facilitator:** Have future Associates push the "caps lock" key again. The little "a" light should now be off and you are ready to learn how to sign onto the system.

Facilitator will write logon and password on the rip chart. Have future Associates press the "Start of Clerk's Day" DynaKey. Explain "Start of Clerks Day" versus "Clerk Sign In" DynaKeys.


The logon screen appears. The cursor (that marks where you are on the screen) is in the area for your logon name.

 **Note to the Facilitator:** Have future Associates type in the logon name.

Now you are ready to type in your password. To get to that area, press the "tab key" just above the caps lock key. That moves the cursor to the password area.

 **Note to the Facilitator:** Have future Associates type in the password.


Notice as you type that you do not see any letters, just asterisks. This prevents anyone from learning your password. Be certain to press each key slowly to be sure you get it right. Be aware that you only have 3 attempts to enter your correct password and if you do not recall it you should contact your supervisor to obtain your duplicate PS Form 3977 envelope for correct log on password and establish a new password.

 **Note to the Facilitator:** Have future Associates press “enter”.
Explain password warning box, and bulletin board message center.

Now you see on the right side of the screen a group of labels. These are called Dynakeys. Look closely and you’ll see that they identify different options. These labels are associated with the physical keys that are immediately to the right of the screen and are called Dynakeys. They change depending on where you are in a given transaction. There are three dynakeys active:

- Window clerk
- Non Retail
- Diagnostics


The “Non Retail Roles” DynaKey is pressed for back office functions.

 **Note to the Facilitator:** Have future Associates press the “window clerk” DynaKey. Have future Associates add the PVI. They will need to logon as supervisors to perform this task (logon SUP password SUP).


- The clerk services screen comes up.
- Cash drawer opens.

While your cash drawer is open, let’s look at it. You have a removable till and a slot in the front of the cash drawer so you can put checks, money orders, and credit card receipts inside without opening the drawer.

Demonstrate that the till is square and can be located north-south or east-west. Top is locked for easy removal and no coin spillage. Now close your cash drawers. Just a couple of steps to do and we’ll be ready to open for business.

 **Note to the Facilitator:** Have future Associates press the “print opening balance” DynaKey.


As you can see, the receipt printer immediately prints your opening balance for the day. This should match the closing balance from the previous day. If the opening balance does not match your records, see your supervisor. After checking your report, place the printout in your till.

 **Note to the Facilitator:** Have future Associates press the “Mailing Services” DynaKey.


Congratulations! You are now on the Domestic Mail Screen and ready to use POS ONE.

Logging Off of POS ONE System - Standby Versus Sign Out

Standby is used when you need to leave your station to go in the back, such as to pick up mail for the customer. Standby locks your drawer while you are away from the Station and no one else can log on and use that station. If you leave your station or do not press any keys for a few minutes, the POS ONE system will automatically set to standby status. This is good if you forget to press standby, but it still leaves your system vulnerable for a few minutes. You need to get into the habit of using the standby feature.

 **Note to the Facilitator:** Have future Associates press the “standby” DynaKey from the opening screen. Go ahead and sign back in. Explain “Control, Alt, Delete” procedure to bring up logon screen.

Sign out is used when you need someone to use your station, and you remove your cash drawer. If you use the sign out procedure, leave for lunch, and do not remove your cash drawer, anyone can log on to your terminal and have access to your money.

 **Note to the Facilitator:** Have future Associates press the “clerk services back office” static key, then the “administration functions” DynaKey, then press the “sign out” DynaKey. Remember they will need to log back on the system.

Screen Review

Title area-is the top bar across the screen. This displays the name of the screen or function.

Prompt area-is the area where you receive guidance. In almost every case, it will tell you what to do next.

Message area-below the prompt area, you see some text in blue. This is usually a reminder of something important about the transaction you are currently running.

Weight area-displays the weight of article on scale.

Notebook area-look at lower portion of your monitor display screen-at what looks like a notebook with spiral binding on the left of it. This is where data about the current customer transaction is shown.

Input area-below the message area, you see a box. This is the input box with a blinking cursor. What you type or key will appear here.

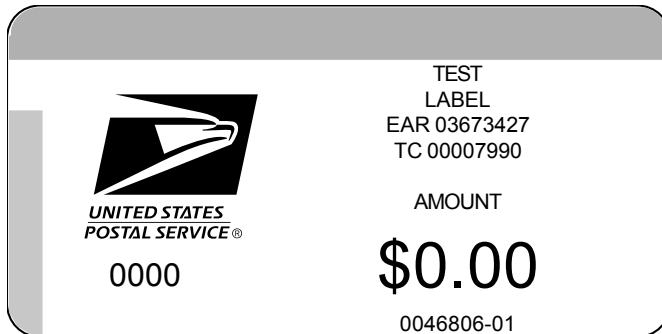
Status area-here you will find a pencil icon when you are in the survey mode and the icon of a broken electrical cord when in degraded mode.

Help-is a static key that you can touch when you need more information about a key or a screen. Let me emphasize how important this button is. The system is designed with detailed help screens for each screen and task. Whenever you have a question or are unsure about anything in the system, touch <help> and read the screen. Have future Associates touch the <help> button to see an example of the help function.

Front office-is a retail term that is commonly used to refer to functions involving a customers visit typically occurring in the “front” of the store.

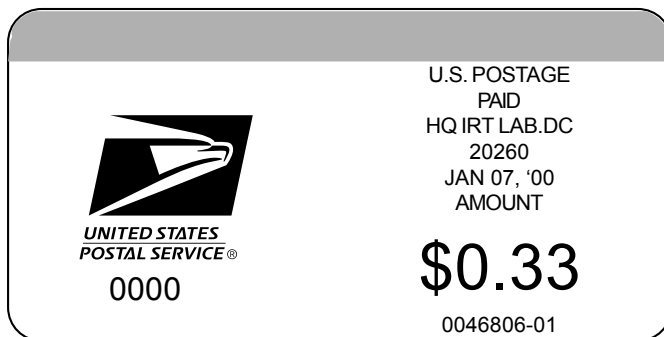
Back office-is a retail term that is commonly used to refer to activities that do not require customer interaction, such as inventory and closeout. These activities typically occur in the “back” of the store.

PVI LABEL DEFINITION



TEST LABEL

Four formats. Obtained by selecting "LABEL" with mode button and pressing paper feed button. Run at start of tour, after clearing a jam and after loading blank labels. NOT to be given away.



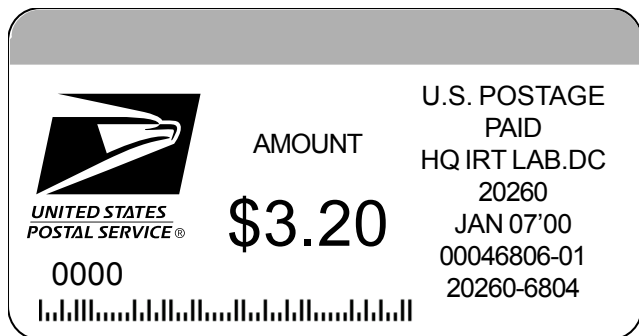
PVI LABEL

No barcode. To be affixed on letters, flats not meeting requirements for POSTNET labels, Express Mail and international mail. Provided automatically for non-POSTNET flats Express Mail and international mail. Can also be obtained by selecting "PO METER" from the "Select Next Function" screen or by selecting "MISC AIC#" and inputting 109.



PVI BARCODE LABEL

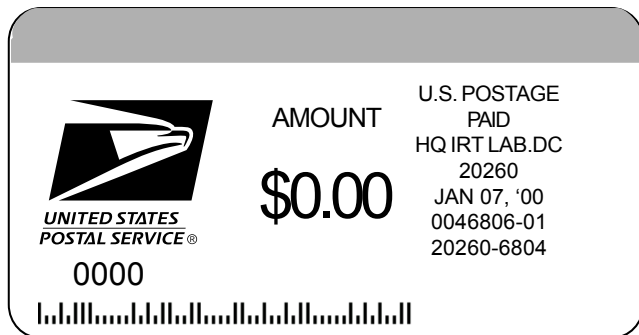
5-digit ZIP barcode. To be affixed on domestic parcels and SPRs/IPP. Also acceptable on letters.

**POSTNET LABEL**

5-, 9-, or 11--digit ZIP POSNET Code. To be affixed on all domestic flats EXCEPT those sent Express Mail, registered, certified, (affix PVI no barcode label on these flats). The 11-digit label is not to be used at this time. Obtained by selecting "FLAT".

**DESTINATION ZIP LABEL**

5-digit ZIP barcode label with no postage value. May be used for domestic parcels and SPRs/IPP that are presented for mailing with postage already affixed. Obtained by selecting "PARCEL".

**DESTINATION POSTNET LABEL**

5-, 9-, 11-digit POSTNET label with no postage value. May be used for flats with postage already affixed which are NOT sent Express Mail, Registered, certified, or special delivery (affix no label on these flats). The 11-digit label is not to be used at this time.

PVI Boot-Up Procedures

There is no Boot up Procedure for the PVI. The PVI should be left on at all times.

Run Test Labels

To generate test labels:

1. Press “MODE” button until label appears on the display.
2. Press “PAPER FEED” button once.

This will cause the PVI to eject a blank label, and printout the four test labels.

Practice exercises

The practice exercises in your training will familiarize you with the functions that can be performed on the POS ONE workstation. Upon completion of these practice exercises you will be familiar with the screen functions, key locations, and sequence of keystrokes necessary to sign on and off, and open the window to serve customers. During these practice exercises you should concentrate more on how to perform the function correctly than on speed. However, do not be afraid of making a mistake. As these exercises will show, you can correct errors. Fatal errors are extremely rare so...relax and enjoy this learning opportunity.



Note to the Facilitator: Lead future Associates through the following exercises. Emphasize the purpose of the exercise is to navigate through the screens.

Exercises

Sales Associate Luigi Scuzzese accepts a 5 oz. Flat rate priority envelope going to East Hanover, New Jersey 07936 from a customer. No special services are requested. The customer also wants a barcoded book of 20 1st class stamps, 10 stamped cards, and pays with a \$20.00 bill. How much change will Luigi return to customer?

200-First Class stamps, 10 stamped cards. Oops!! I forgot my wallet. Cancel everything.



Note to the Facilitator: Demonstrate different ways to sell stamps. (Scan, key item code, or lookup).

Mail a parcel weighing 35 lb. to zip 22301. How much for first class? Pay cash-exact amount. How much is Parcel Post? Okay send it Priority.

Parcel weighing 1-lb., 8 oz. To local zip code. Insure for \$86.00 and a return receipt showing who, date and where delivered. Use PVI. Sell 5-international reply coupons. 9-aerogrammes. 5-Priority Mail stamps. Customer pays with \$30.00 cash.



Note to the Facilitator: Review quickly the “Other Customer Services” Static key, and the “Clerk Services Back Office” Static key.

Module 4D:

POS ONE - IBM

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Module 4D: POS ONE - IBM

Terminal Objective:

Upon the conclusion of this module, future Associates will demonstrate basic POS ONE skills necessary to perform basic navigation through the POS ONE system.

Enabling Objectives:

Upon completion of this module future Associates will be able to:

- Explain the features and benefits.
- Explain the function of each POS ONE component.
- Explain hardware maintenance.
- Demonstrate safety practices and procedures.
- Demonstrate log on procedures.
- Demonstrate log off procedures.
- Identify terms and basic screen set up.
- Demonstrate PVI start up procedures.
- Demonstrate how to use the Sales and Services Quick Reference Guide.

Time allocated for module: 2 hours

Instructional Methods: Presentation, Discussion, Demonstration, Hands On Exercises

Summary of Instructional Plan:

The facilitator introduces the module by summarizing the topics to be covered. The facilitator describes the benefits and features of the POS ONE. The facilitator identifies and describes the hardware used in the POS ONE.

Materials Required:

Instructor: POS One Terminal, Rip Chart, colored markers, Sales and Services Quick Reference Guide

Future Associates: Workbook, pens or pencils, and colored markers

PRESENTATION:

POS stands for point of service - it's a retail workstation.

One indicates this is the first of its type. There are several specific features that will make POS ONE easier to use:

- A user-friendly color touch screen.
- An all-purpose scanning device for express mail and product scanning.
- The cost of every postal product and service is built into it and allows ease in upgrading.
- A multi-purpose receipt printer, money order imprinter, and bank stamp imprinter for checks.
- Includes remote system monitoring, which allows network updates to the DMM, IMM, and express mail network.

Benefits of POS ONE include:

- Introduces a state-of-the-art system that is committed to customer perfect by supporting voice of the employee, providing complete, consistent, and effective communication with retail clerks.
- Supports voice of the customer and voice of the business.
- Is simple to use with an easy-to-read color touch screen.
- Provides quicker and more efficient customer service.
- Provides accurate and up-to-date information on all rates and services.
- Provides detailed sales order information, improving availability of stamps and other products.
- Provides easy ZIP code and ZIP+4 access.
- Provides up-to-date data on APO/FPO restrictions.
- Provides on-line help screens throughout the system.
- Eliminates dual systems in postal stores.
- Eliminates personal floppy disks.
- Eliminates the need for manual surveys and sample studies.
- Prints all money orders, reducing the chance for errors.
- Decreases transaction time for money orders, customer meters, and trust accounts.
- Holds the complete DMM and IMM, as well as F3 fill.

POS ONE is more efficient than your present system with its ability to add and upgrade system features. Because of built-in postal rules, POS ONE will help reduce or even eliminate human errors. The customers' options are displayed on a screen allowing them to make quick comparisons of price and value. The system prints out forms that were previously completed manually.

Network

The POS ONE tallies each transaction and builds a data file. When you close out, it automatically transfers the record through a series of cables to a central file at the post office via a Local Area Network (LAN). No more disks to worry about! The LAN server at your post office hooks up to a nationwide database network called WAN, for Wide Area Network. From a central computer, the WAN also sends out automatic software updates of rules, ZIP codes, APO, rates and embargoes. In the future you will be able to check for lost or stolen money orders, credit cards, and bad checks. The data generated during the course of each transaction is stored to help track inventory and to generate reports.

Components of the POS ONE System

Terminal – it is the “brain” of the system where information is stored. A terminal is used for front office functions and automatically backs up all the transaction information. One of the terminals in your office may have a tower with a CD ROM. This will depend on how your post office is set up for the POS ONE system. The terminal should never be turned off without consulting the POS ONE help desk (1-800-USPS-help).

Touch screen – it is used to complete transactions when you lift your finger off the screen. If you touch the wrong place on the screen, simply slide your finger to the correct place, and then lift it off. Please remember that pens, pencils or other pointed objects should never be used instead of your finger. The screen only requires a light touch.

Bar code scanner – is used to enter items by reading labels with bar codes. It is similar to the scanner that you may use now although it is far more versatile and easier to use. You can scan in two ways: (1) slide the bar code under the scanner so that the red beam runs across the entire bar code. (2) if an item cannot be scanned in this manner, remove the scanner from its stand, pull the trigger and point the red beam across the entire bar code. The light must cross the entire code to read it correctly.

Receipt printer – provides customer receipts for each transaction. They are printed on thermal paper and produced at the top of the printer. There is no ribbon in the receipt printer, it uses heat to print on the receipt paper. You will be very happy to see how quiet and fast the printer is and the receipts are automatically cut.

There is a second printing area used for franking checks; printing Money Orders and reports. It also prints some of the postal forms, such as the insurance form and certified mail form. The system will prompt you to feed these items into the printer. They are placed on the flat plate located in the middle of the printer, which we will be calling the document insert station.

The printer can read the MICR-encoded, preprinted customer account number on the bottom of a check and serial numbers on a money order. "MICR" stands for magnetic ink, character recognition.

Scale – is used to weigh customer packages and letters. Objects should not be left on the scale when it is not being used as this will cause the scale to lose calibration. Notice the template is available on the scale. This ready reference helps you make decisions regarding surcharges, post card sizes, flat vs. letter sizes, etc. when you are rating mail.

PVI unit – generates mailing labels. It is the same piece of equipment that is currently being used in post offices to apply postage to packages and letters.

Cash drawer – is used to store cash and other tenders. The drawer will open electronically at the end of appropriate transactions. The system keeps track of every time the drawer opens.

Customer display unit – faces the customer and displays and transaction information. In the future it will be used to read debit cards, enter customer pin numbers and capture signatures.

Keyboard –this is a standard keyboard with a built in touch pad that is used for most transactions. There is a small touch pad on the lower right side of the keyboard. This can be used to move the cursor, in a manner similar to a mouse.

Uninterruptible Power Supply – the UPS has a battery that allows you to complete immediate customer transactions and close down the system without losing any data, if there's a power failure. The system should always be plugged into the UPS box. If a power surge or outage should happen, the UPS will provide power for at least 5-10 minutes. This will allow time to remove the till and sign off the system correctly.

Laser printer – may be attached to one or more terminals. It will be used for report printing and other procedures.

Hardware Maintenance

There are a few things that you will be asked to do to help keep the equipment clean and running properly. It is extremely important never to use water or cleaner directly on any piece of equipment.

The touch screen will often be dirty and smudged with fingerprints. Turn the screen off and clean with a light touch using a soft rag.

Occasionally the equipment will also need to be cleaned. The best way is to lightly spray a soft clean rag with non-abrasive cleaner and gently wipe off the equipment.

When the receipt printer is out of paper, the “paper out” light will turn red and you will need to put in a new roll.

If a piece of equipment does not seem to be working properly, it may be as simple as the cable linking it to the terminal is not properly connected. The cable linking each piece of equipment has a colored tag which matches the port that it is plugged into.

Safety Practices and Procedures

As with any job and any equipment you may use, safety is the responsibility of every individual in the U.S. Postal Service. Your supervisor is responsible for instructing personnel in safety practices applicable to the operation of the equipment. In the same manner, it is the same responsibility of each individual operating the equipment to understand and observe the safety standards and procedures established by the U.S. Postal Service. The operation of electronic and electrical equipment has several elements of danger. Carelessness can result in injury. You must observe the following precautions:

- Do not operate equipment without proper authority.
- Follow all safety precautions.
- Do not operate unsafe or defective equipment.
- Avoid unsafe act and conditions.
- Practice good housekeeping.
- Do not engage in horseplay.
- Immediately report all hazardous conditions and operations to your supervisor.
- Keep mentally and physically alert.
- Know the location of the main power shutdown devices.
- Always turn the power off when doing any replacement or repair of components.
- Do not operate the POS ONE without properly installed covers. (i.e. without scales platform).

- Check the power plug before plugging it in. Always use a power cord that is in good condition. A power cord that is frayed or has broken insulation is a shock hazard.
- To avoid the danger of electrical shock, make sure the power plug is inserted into a properly wired receptacle.
- Never place food or liquids on or around any part of the equipment.
- Keep clothing, hands and feet dry.
- Avoid the use of toxic or flammable solvents for cleaning purposes. If there are certain jobs specifically requiring the use of these solvents you must use protective gear.
- In the event of a fire, use a type C, BC or ABC extinguisher only. Do not use water or any other liquid stream extinguisher, as either presents a shock hazard to the user and will cause considerable damage to electrical equipment.
- Know how to get medical aid.

Following safety procedures can save you from injury and will prevent lost time for you and the Postal Service.

Signing on to POS ONE System

It is important to always read the screen. You will often find that reading the screen will naturally lead you to the next step. You will access functions and items by touching the appropriate buttons or lists. Again, it is not necessary to touch too hard; touch firmly using the pad of your finger.

You will be assigned a permanent ID and initial password. Although it is possible to enter on the touch screen, you will be using the keyboard to enter your password. We suggest this to protect the secrecy of your password as it is much more difficult for a person to see your password when you are using the keyboard rather than touching the screen.

The sign on screen has 4 white boxes – clerk ID, password, stock unit and domain. These boxes are called fields. A field is an area to enter specific information. To sign on each of these boxes must be filled with information. Note that the domain field is always the same and is used by the network.



Note to Facilitator: Have future Associates touch the clerk ID field.

Touch <abc...> to view the alpha (letter) keyboard. Touch the list button to the right of the gray field in the keypad and touch the appropriate clerk ID. Have future Associates use the keypad to enter the clerk ID and touch <enter>

Mention the <back>, <delete> and <clear> buttons and how they work. The <back> button erases one character to the left of the blinking line. The <delete> button erases one character to the right of the blinking line. The <clear> button erases everything in the field.



Note to Facilitator: Give future Associates a minute to experiment with how these buttons work.

Notice how the keypad changes to be the password keypad when <enter> is touched. The <enter> button accepts the information and moves the keypad to the next field. <enter> must be touched to let the system know that the information is complete. To move to a different field simply touch inside that field.

For security reasons, the password will appear only as stars (****) on the screen and notice that there is no list button for a password. Emphasize that it is important to use the keyboard to enter their password so that no one can see what they are entering. Be aware that you only have 3 attempts to enter your correct password and if you do not recall you should contact your supervisor to obtain your duplicate (PS Form 3977) envelope for correct log on password and establish new password.



Note to Facilitator: Have future Associates use the keyboard to enter the password and touch <enter>.

The stock unit is the collection of stock that you sell from. Notice that there is a pick list button for this field. Although all of the stock units are listed, you are only allowed to select those that you have access to.



Note to Facilitator: Have future Associates touch stock unit field to see the list of stock units. Allow them to practice using the scroll arrows and bar on this screen.

Explain that <enter> is only available on keypads. <done> should always be greyed out if the keypad is available. The <done> button will only work if all the necessary fields have the information they need and the <enter> button has been touched in each.



Note to Facilitator: Have future Associates touch the appropriate stock unit ID and touch <enter> and <done>.

If an invalid ID is entered the system will display a message. Touch <OK> to try again.


The fourth field is the domain field. The domain identifies your postal district. You will not be changing this field.

You are now at the main tasks screen ready to begin the first transaction.


Signing off of POS ONE System

It is the end of your shift and you are finished working at your retail counter. If you are on the screen other than the customer visit screen, touch <quit> to reach this screen.

The system will display a message asking you to confirm that you want to sign off the system. The screen will then return to a blank sign on screen. Another user may now sign on at this time.

 **Note to Facilitator:** Have future Associates touch <quit> on the customer visit screen. Now touch <yes>.

Screen Review

 **Note to Facilitator:** Have future Associate sign on again and touch <customer visit>, <sales>, <loose stamps> to cover screen review.

Title area-is the top bar across the screen. This displays the name of the screen or function.


Status line-shows the transaction number (once the transaction has begun), unit location, workstation ID (which is the name of the terminal being used), user ID (which is the name and stock unit of the clerk who is signed on), date and time.

Receipt log-is the section of the screen that displays details for each item sold during a transaction. These details will also appear on the printed receipt at the end of the transaction. On the main tasks screen, instead of a receipt log there is a “picture” displayed. This picture may change periodically as the system is upgraded and improved.

Input area-is the section of the screen where boxes, buttons, and lists appear.

Buttons-are labeled rectangles on the screen that can be touched to choose an item or an action. The words on the buttons will be either black or grayed out. When they are black the function is available. When they are grayed out the function is not available. On this screen, <loose stamps>, <stamps>, <page down>, and <done> are all examples of buttons.


Pick lists-offer several choices of items. Touch one of the items in the list to select or “pick” it. Some of the data lists are very long and take a moment to display on the screen. Be patient and don’t double-touch the button. We saw a pick list when we were signing on (list of clerk IDs and list of stock units).

 **Note to Facilitator:** Have future Associates touch <retail product> to view a pick list. Touch <cancel> to return to the sales screen.

Keypad-appears on the screen when you need to enter information containing numbers or letters. For example, if you need to enter a quantity, a keypad will appear that displays numbers to touch. If you need to enter an address, a keypad will appear that displays both letters and numbers to touch. You may also use the keyboard to enter information. We saw an example of a keypad when we were signing on.

A field holds a specific piece of information for the system. When information needs to be entered or could be changed in the system, an empty box will appear on the screen, waiting to be filled with new information. This box represents a field. For example, the system holds customer details like “city” in a separate field, or holding place, from “state.” Two separate boxes (or fields) will appear on screen, one labeled “city” and one labeled “state.”

Standard button area-is a row of buttons at the bottom of almost every screen. The buttons are: <help>, <lock>, <quit>, <tasks>, <cancel>, and <done>.

 **Note to Facilitator:** Have future Associates touch each button, and explain.


Help-is a button that you can touch when you need more information about a button or a screen. Let me emphasize how important this button is. The system is designed with detailed help screens for each screen and task. Whenever you have a question or are unsure about anything in the system, touch <help> and read the screen. Have participants touch the <help> button to see an example of the help function.

Lock - is a button you touch when you walk away from your POS 1 terminal. This feature locks your terminal, so that no one can tamper with your cash funds. Never lock when you go to lunch. Always take your cash till out, secure in safe and sign off. <quit>

Quit-is the button that you will touch to sign off of your workstation. It is also used when you no longer need to finish a transaction.

Tasks-is a button that will list all of the different activities that the system is running. The different activities will be displayed in a white box. The <main tasks> button will return the screen to the main tasks screen. This would allow you to do more than one thing at a time. For instance, in the middle of a transaction, use the calculator. Have participants touch <tasks>. Touch <item entry> and then touch <OK>. (returns where you started)

Cancel-is the button that you will touch when you need to back up to the previous screen.

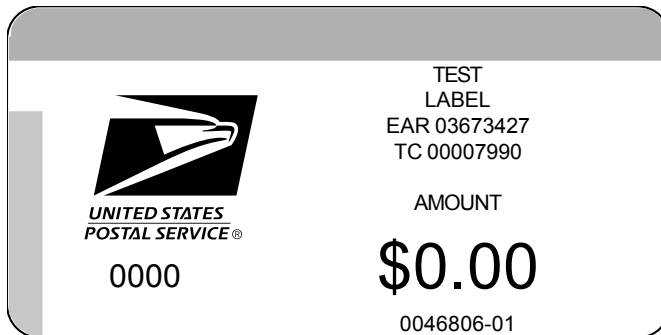
 *Have future Associates touch <cancel> and see the screen move back to the customer visit screen. Touch <sales> again to return to where you were.*

Done-is the button that you will touch when you are ready to move to the next screen. The <done> button here is grayed out because we have not sold any items from this screen yet.

Front office-is a retail term that is commonly used to refer to functions involving a customer visit typically occurring in the “front” of the store.

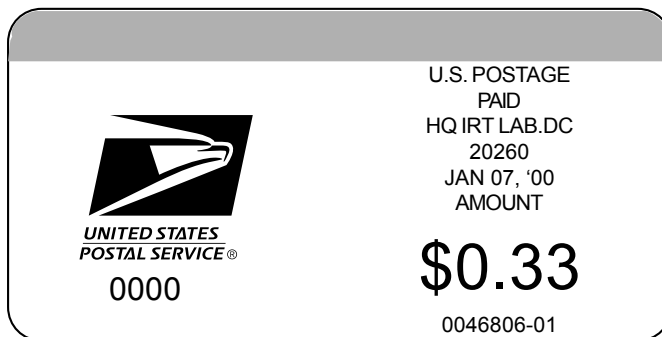
Back office-is a retail term that is commonly used to refer to activities that do not require customer interaction, such as inventory and close out. These activities typically occur in the “back” of the store.

PVI LABEL DEFINITION



TEST LABEL

Four formats. Obtained by selecting “LABEL” with mode button and pressing paper feed button. Run at start of tour, after clearing a jam and after loading blank labels. NOT to be given away.



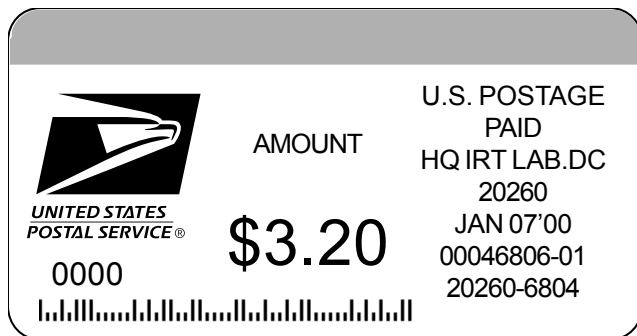
PVI LABEL

No barcode. To be affixed on letters, flats not meeting requirements for POSTNET labels, Express Mail and international mail. Provided automatically for non-POSTNET flats Express Mail and international mail.



PVI BARCODE LABEL

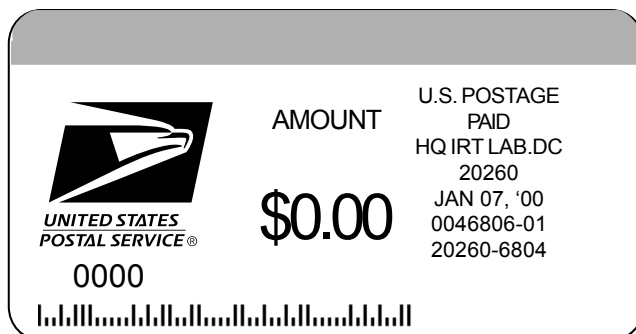
5-digit ZIP barcode. To be affixed on domestic parcels and SPRs/IPP. Also acceptable on letters.

**POSTNET LABEL**

5-, 9-, or 11-digit ZIP POSTNET Code. To be affixed on all domestic flats EXCEPT those sent Express Mail, registered, certified (affix PVI no barcode label on these flats). The 11-digit label is not to be used at this time.

**DESTINATION ZIP LABEL**

5-digit ZIP barcode label with no postage value. May be used for domestic parcels and SPRs/IPP that are presented for mailing with postage already affixed.

**DESTINATION POSTNET LABEL**

5-, 9-, 11-digit POSTNET label with no postage value. May be used for flats with postage already affixed which are NOT sent Express Mail, registered, certified, or special delivery (affix no label on these flats). The 11-digit label is not to be used at this time.

PVI Boot-Up Procedures

There is no Boot up Procedure for the PVI. The PVI should be left on at all times.


Run Test Labels

To generate test labels:

1. Press "MODE" button until label appears on the display.
2. Press "PAPER FEED" button once. This will cause the PVI to eject one blank label, and print out the four test labels.

Practice exercises


The practice exercises in your training will familiarize you with the functions that can be performed on the POS ONE workstation. Upon completion of these practice exercises you will be familiar with the screen functions, key locations, and sequence of touch screen/keystrokes necessary to log on and off the system. During these practice exercises you should concentrate more on how to perform the function correctly than on speed. However, do not be afraid of making a mistake. As these exercises will show, you can correct errors. Fatal errors are extremely rare so...relax and enjoy this learning opportunity.

 **Note to the Facilitator:** Lead future Associates through the following exercises.

Exercises

Sales Associate Luigi Scuzzese accepts a 5 oz. Flat rate priority envelope going to East Hanover, New Jersey 07936 from a customer. No special services are requested. The customer also wants a barcoded book of 20 1st class stamps, 10 stamped cards, and pays with a \$20.00 bill. How much change will Luigi return to customer?

200-First Class stamps, 10 postal cards. Oops!! I forgot my wallet. Cancel everything.

 **Note to the Facilitator:** Demonstrate different ways to sell stamps: scan, key item code, use of denomination of stamp and pick list.

Mail a parcel weighing 35 lb. To ZIP 22301. How much for first class? How much is Parcel Post? Okay, send it first class. Should you mark the parcel priority? Pay cash-exact amount.

Parcel weighing 1-lb., 8 oz. To local ZIP code. Insure for \$86.00 and a return receipt showing who, date and where delivered. Use PVI. Sell 5-international reply coupons. 9-aerogrammes. 5-Priority Mail stamps. Customer pays with \$30.00 cash.

Module 5:

Domestic Mail

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Module 5: Domestic Mail

Terminal Objective:

At the conclusion of this module future Associates will accept and process the classes and types of domestic mail.

Enabling Objectives:

Upon completion of this module future Associates will:

- Identify and explain domestic mail.
- Explain mail acceptance.
- Explain (declared/undeclared) HAZMAT (hazardous materials) and safe handling in the mail.
- Explain classes of mail.
- Define mail standards (size and weight limitations).
- Demonstrate the use of a domestic rate fold and zone chart.
- Explain USPS Aviation Mail Security Instructions

Time Allocated for this Module: 2 hours

Instructional Methods: Discussion, Presentation and Exercises.

Summary of Instructional Plan: Explain the acceptance and processing of the different classes and types of Domestic Mail.

Materials Required:

Instructor: video (Priority Mail), rip chart, markers, pen and pencils, and overhead/transparencies, samples of all HAZMAT warning labels, cloth measuring tape, HDBK EL-812, Notice 123, nOTICE 107, PS Form 2976, PS Form 2976A refer to General Mailability Requirements in Appendix.

Future Associate: workbook, pen and pencils, rate fold, zone chart, Notice 3A template

PRESENTATION

Facilitator will explain that domestic mail is sent in, among and between the United States, its territories and possessions, Army/Air Force (APO-Army Post Office) and Navy (FPO-Fleet Post Office), Post Offices, and the United Nations. Reference: DMM Section G.



Note to Facilitator: Explain to new Sales and Services Associates there are three types of mail processing categories: letters, flats, and parcels. Refer to DMM Quick Service Guide 050, Basic Mailability and Processing Categories.

There are basic standards for accepting articles for domestic mail service. A Sales and Services Associate should examine and check the following:



Note to Facilitator: Instructor, state that if any of these conditions are not met, the mailer must correct them. Place overhead titled Exhibit 4 (Standard Acceptance Procedures).

- Addressing
- Outside packaging
- Sealing of package (no scotch tape, no masking tape) NOTE: Instructor show acceptable tape.
- If the contents are liquid or fragile, perishable, or potentially hazardous (not a detail description of what is inside) the item must be marked or endorsed properly.
- Shake container gently to determine if cushioned properly.
- Press lightly on container to determine if item can withstand transportation and articles being placed on top.



Note to Facilitator: Review General Mailability Requirements in the Appendix.

HAZMAT or hazardous materials may be found in the mailstream at any time. Hazardous materials are substances or materials containing a chemical or infectious biological substance in a quantity and/or form that may pose an unreasonable risk to health, safety, or property when transported in commerce, and which pose a risk to the safety and health of USPS employees if not handled properly. Sales and Services Associates need to be able to recognize and know what constitutes HAZMAT, how to identify HAZMAT and how to safely handle HAZMAT.

What constitutes HAZMAT:

The USPS does not accept regulated quantities of hazardous materials and dangerous goods which require the display of Department of Transportation (DOT) Hazardous Material Warning Labels, with certain exceptions. See DMM Section C020-024 and Publication 52 for examples.

Types of HAZMAT include:

- Flammable materials (can be in the form of a liquid, solid or gas)
- Corrosive materials (corrosive will cause burns, irritate eyes and nose and lungs)
- Reactive materials (when a material undergoes a chemical reaction, it is said to be reactive i.e. Heat generation, fire, explosion, toxic gas/vapor production)
- Toxic materials (these have an adverse effect on the body such as allergic reactions, cancer, etc.)
- Biological materials (these include body fluids such as blood, urine, poisonous insects and plants and harmful microorganisms.
- Radioactive materials (such as found in smoke detectors and various microwave ovens.



Note to Facilitator: Hand out Notice 107.


Declared/Undeclared HAZMAT:**Declared HAZMAT**

Use job aide overhead transparency “EXHIBIT 5” (Declared HAZMAT Labels)

Is mail that is properly packaged, marked and declared by the mailer and properly accepted by the Postal Service in accordance with the DMM, Section C & Publication 52.


Undeclared HAZMAT:

Is any parcel suspected of containing acceptable or prohibited HAZMAT as described in the DMM & Publication 52 which is not properly packaged, labeled or identified.


 **Note to Facilitator:** Use job aide (overhead transparency “EXHIBIT 6” Letter and Package Bomb indicators). Highlight the following issues with the transparency:

If you suspect that a parcel may contain hazardous chemicals or infectious substances, you should pay attention to other indicators such as the following package characteristics:

- Sound of broken glass or plastic.
- Stains or leakage, or unusual odor.
- Delivery or return address information (i.e. Chemical company. Laboratory, etc.).
- Preprinted markings on parcel (i.e. bleach, aerosol hair spray, etc.)
- Manufacturers name (i.e. Joe’s Chemicals, Butane Lighters R US, etc.)
- Shifting weight or liquid sound.


 **Note to Facilitator:** Review Spotting Potentially Hazardous Materials in the Appendix.

How to safely handle HAZMAT.

 **Note to Facilitator:** Use job aide (overhead transparency) “EXHIBIT 7” Guidelines for Handling Parcels Suspected of Containing Hazardous Materials. Use job aids (General Mailability Requirements), Spotting Potentially Hazardous Materials, Package Characteristics in the Appendix section.

Classes of mail.

- Express- 1-2 day delivery, guaranteed, all mailable matter may be sent Express Mail.
- First Class/Priority- handwritten or typewritten personal correspondence such as bills, statements of account, postal cards, and business reply mail. It is closed against inspection. Something small such as circulars, booklets, flower bulbs, devices, keys, seeds, etc. Normally 2-3 day service (Priority) not guaranteed.
- Periodicals-publications, magazines and newspapers
- Standard [Previously called Standard A]
- Package Services [Previously called Standard] Parcel Post, Printed Matter, Library Mail, and Media Mail


 **Note to Facilitator:** Use DMM to define each sub-class of package services.


 Before going into the Priority Mail Services Information, explain to the future Associates

- First Class becomes Priority Mail at 13.1 oz.
- All First Class can be upgraded to Priority Mail when Priority Mail postage and fees are paid and the item is marked "Priority Mail."


Priority Mail

- This is our most profitable service.
- 2 to 3 day Service (not guaranteed).
- All mailable matter may be sent Priority Mail.
- Can be used with all other Special Services.
- Has its own processing and delivery network.

 Show future Associates the Sommers Communication Video titled "Priority Mail".

 Demonstrate to the future Associates the close comparison of rates between Priority Mail and Package Services up to 10 lbs in weight.


Mail standards-size and weight limitations.

 **Note to Facilitator:** Use job aide (overhead transparency "EXHIBIT 8" Weights). Demonstrate measuring the length, girth and width on sample packages, then have the future Associates demonstrate how to measure.

The maximum weight acceptable in domestic mail is 70 lbs.
The length plus the girth cannot exceed 108 inches. Exception is Parcel Post can be 130 inches (length plus girth).


 Use job aide (Domestic Fold and zone chart) to calculate Inter and Intra BMC.

Surcharges.

 Use job aides overhead transparency EXHIBIT 9 (Surcharges).

Aviation Security

Aviation security policy covers all mail that is sent by air to domestic and international destinations. Management must ensure that all employees are aware of all current USPS Aviation Mail Security procedures and instructions. Compliance with these FFA instructions is mandatory.

 **Note to Facilitator:** Obtain a copy of the Aviation security instructions from your district aviation Security Program coordinator and review with class.

Target Mail

All mail that uses postage stamps and weighs one pound or more that could be sent by air is considered target mail. This mail must be removed from the mailstream and handled separately. Under no circumstance should this mail be shipped by commercial airlines. All mail that is considered suspect and deposited in mailboxes must be endorsed properly with “customer notification DDD-2 sticker” and “surface only” and returned to the sender by surface transportation.

 **Note to Facilitator:** Show students a DDD-2 sticker.

Stamped mail that is handed to a letter carrier or to a Sales and Services Associate that weighs one pound or more **must** be date stamped before shipment. This mail will be handled in accordance with the current Aviation Security Procedures.

The following are examples of what is **NOT** target mail.

- Mail accepted from a known mailer
- Official mail going to, from or between APO or FPO ZIP codes
- Express Mail items paid by corporate account and deposited into an Express Mail collection box.

International Mail and APO/FPO Addresses

International mail and APO/FPO that weighs over 16 oz. is subject to the Aviation Security Policies. In addition to those policies all mail must have a custom declaration form attached if required. If a known mailer who legally applies for a permit imprint to a mailpiece, a federal, state or local government agency that sends official mail, or a military contractor who sends prepaid mail with the endorsement "Contents for Official Use" could be exempt from Customs Requirements.

Acceptance by Postal Employee

The Postal Service acceptance employee must:

- Instruct the sender how to complete, legibly and accurately, the customs declaration form, as required.
- Verify that the required information is entered on the form and that the sender has signed the form (both parts if using a 2976).
- Enter the weight of the article if not already done.
- Remove the Post Office copy of the 2976 and 2976-A and advise the customer that a copy will be retained as a record of mailing for 30 days.
- Round stamp any uncanceled stamps and if postage is paid by meter, round stamp the front of the piece near the meter postage.
- If form 2976-A is used round stamp the third copy and insert the entire declaration in envelope 2976-E.


In addition to the above procedures the acceptance employee must make certain that all boxes on the PS Form 2976-A are complete.

- If insured, complete an insurance receipt and affix the insured number label to the package, enter the insurance number, the insured amount in U.S. dollars, and SDRs.
- Weigh the parcel and enter the gross weight and the amount of postage.

Aviation security is the responsibility of all employees. We must be aware of these procedures and any changes that may occur. Check with your District Aviation Security Office for local and current policies.

Re: Postal Bulletin 21971 (5/7/98)

Exercises:

 Have class use rate fold for odd numbered questions, and retail equipment for even numbered questions.

1. How much is 10 lbs., Media Mail?
2. How much is a package going Parcel Post, weighing 17 lbs. Going to zone 6?
3. How much is the postage on a 15 lb. parcel going inter-BMC to zone 4 measuring 35" by 16" by 16"?
4. How much is a 3 oz. First class letter?
5. How much would a Bound Printed Matter parcel cost that is 10 lbs. Going to zone 4?
6. How much is a Priority Mail parcel that weighs 8 lbs. Measuring 87" going to zone 6?
7. How much is a First-Class Mail parcel weighing 12 oz. and measuring 12" by 10" by 13"?
8. How much is a 10" by 13" flat weighing 1 oz. First-Class Mail?
9. How much is a 40" by 21" by 15" (length plus girth 112") parcel weighing 47 lbs, 5 oz. to Zone 6 Parcel Post?
10. How much is a parcel weighing 17 lbs and measuring 34" by 18" by 16" Library Mail?

Day One Review

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Day One Review

Terminal Objective:

Upon the conclusion of this module, future Associates will be able to explain the lessons of the first day.

Enabling Objectives:

Upon the conclusion of this module, future Associates will be able to demonstrate the objectives of the modules presented the first day through questions and answers.

Time Allocated for this Module: 45 minutes

Instructional Methods: Question and Answer Game

Summary of Instructional Plan:

Facilitator will give instructions to the future Associates on how to play the game.

Materials Required:


Instructor: Rip Chart, colored markers

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION

 **Note to Facilitator:** to review the day, have future Associates play a basketball game called “High Score You Win”

- Divide future Associates into two teams.
- Help each group prepare a set of 10 questions.
- All questions must come from the modules covered that day.
- All questions must have the page reference from the module.
- Teams may not ask two or more part questions
- Facilitator acts as the referee for the game.
- The decisions of the referee are final
- Each team will “shoot” a question to the other team. A correct answer receives a “swoosh”(2 points). The team with the points continues to shoot until they answer a question incorrectly.
- Each team will select a team “captain”.
- Each team will have a “shooting order”. Any member of the team may answer a question, however, once a team member has answered a question they cannot answer another question until all other members of the team have answered a question. The team captain will keep track of who has answered a question.
- When a question is shot to a team, members must raise their hands if they wish to answer the question. The captain will select a member to answer the question.
- There must be no discussing of the question or answer among team members. Remember, the referee (facilitator) may call “foul” for such an offense.
- Have each team select a name for itself.
- Facilitator-set up rip chart with the heading of the “Final Four”. Divide the chart into two parts and label each side with the name that each team has selected.
- Umpire (facilitator) acts as the recorder of runs on the rip chart.

 **Note to Facilitator:** if possible, it is suggested to have some sort of prize for the winning team. One possible source of “prizes” could be your district retail person or postal business center.

Day Two

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Module 6:

Express Mail

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Module 6: Express Mail Service

Terminal Objective:

Upon completion of this module future Associates will be able to sell, accept, and process Express Mail Service.

Enabling objectives:

- Identify and describe the types of Express Mail Service.
- Identify and describe the benefits and features for Express Mail Service.
- Explain Express Mail labels.
- Identify Express Mail, Corporate Accounts and Federal Agency Accounts.

Time Allocated for this Module: 90 Minutes

Instructional Methods: Discussion, Presentation, Demonstration, Retail Equipment Exercises, Sommers Communications Video titled “Express Mail” and Mock Lobby.

Summary of Instructional Plan:

The facilitator introduces the module with the Express Mail Service video. The facilitator will deliver a motivational lecture on Express Mail , (the USPS premium service). The facilitator will demonstrate the procedures for acceptance of an Express Mail Article.


Materials Required:

Instructor: Rip Chart, markers, pen and pencils, Express Mail Labels (11A, B,C,108, 63, 86) and boxes, Express Mail Service video

Future Associate: workbook, pen and pencils

PRESENTATION

Introduction

 **Note to Facilitator:** Show video – Express Mail (Sommers), then discuss with future Associates.

Express Mail Service is designed to meet the increasing demand for fast, reliable delivery of mail. Express Mail Service offers guaranteed same day, one day or two-day service. **The guarantee is on time attempt of delivery or money back.**


Express Mail Service receives expedited handling from the time of acceptance through delivery. The use of distinctive labels and the orange and blue express mail pouches are designed to give high visibility allowing postal employees to isolate these pieces from regular mail and expedite handling.

Express Mail Services

- Post Office to Addressee (sent to a specific street address or Post Office Box)
- Post Office to Post Office (sent to another Post Office for pick-up by the addressee, sender must call addressee and advise the addressee to pick-up at the receiving Post Office.)
- Custom Designed (customer selects the time and place for both acceptance and delivery of the shipments)
- Express Mail Military Service (2 and 3 day Service to designated Military APO's/FPO's)


Benefits and features of Express Mail Service

- Postage and fees can be paid by Express Mail Corporate Accounts, or Federal Agency Accounts
- Provides a record that the article was delivered. A signature is required unless a waiver is signed.
- Available 365 days a year.
- Express Mail supplies (including firm mailing book) are available free of charge. They may be picked up at any post office or received by mail at 1-800-222-1811.
- Flat rate envelope is available for the 2-pound fee regardless of weight or domestic destination.

 **Note to Facilitator:** Show future Associates the similarity between the regular express envelope and the 2-pound flat rate envelope. Ask the future Associates to tell you the difference.

- Insurance (up to \$500) is included at no additional cost; however, additional merchandise Insurance may be purchased up to \$5,000.
- Waiver for weekend or holiday delivery is available.
- Express Mail is forwarded at no charge to the addressee or mailer.
- Return Receipt Service is available for a fee with Domestic Express Mail Service.
- Guaranteed “ Attempted on time delivery or your money back”
- Allows customers to deposit express articles at any post office, drop box, or postal pick up.
- Express Mail is tracked and traced. Delivery information is available to customers at a toll free number (1-800-222-1811 or www.usps.com)

Express Mail Labels

 **Note to Facilitator:** Show and explain the different types of Express Mail Labels (ie. This is a Post Office to Post Office Express Mail Label A, this label when attached to a article means that the item is (ask a future Associate to complete the Service, ask other Associates what other services accompany the Service, such as forwarding, tracking and tracing, etc.)


- Post office to post office -Label A (items mailed are available for pick up at the destination post office by 10 a.m.
- Post office to addressee –Label B (items mailed by acceptance cutoff time will be delivered to addressee’s door (or post office box) by noon or 3 p.m. the next day, or second day if applicable.

Express Mail Corporate Accounts and Federal Agency Accounts

- Express Mail Corporate Account is a trust account that allows customers who mail frequently to pay postage for Express Mail through an issued Account Number.
- Federal Agency Express Mail, this allows Federal Agencies to mail Express Mail using their issued Federal Agency Account Number.

Exercises

1. An office that receives for delivery Express Mail from another office is which of the following.
 - A. Destination office**
 - B. Office of origin
 - C. Acceptance office
 - D. None of the above
2. What are the maximum dimensions (length and girth) for a domestic express mail article:
 - A. 90 inches
 - B. 108 inches**
 - C. 100 inches
 - D. None of the above
3. Why is it necessary for the addressee to sign for delivery (when a Waiver of Signature was not requested) for label 11A or B items?

 **Note to Facilitator:** Answer – the Label 11A or B when signed provides a record that the article was delivered to the person who signed.


4. A post office to Addressee article addressed to Jim Lang at Post Office Box 1777, Denver, CO 80201 was received in the box section at 1:00 PM. The item was accepted for noon delivery. The box clerk recorded the information in the appropriate block and placed a notice in the box. Did the item meet the service standards?

Answer- No

5. **True** or false. The service standards for Label 11B articles include delivery by 12:00 PM (noon) or 3:00 PM.

6. Which of the following is required from a customer if a waiver is not on file, before you deliver an express mail article?
- A. Signature
 - B. Payment
 - C. Identification
 - D. None of the above

IRT/POS ONE Exercises

 **Note to Facilitator:** Have the future Associates process the following using the retail equipment.

1. In this exercise the customer is mailing a 1lb., 8 oz. article via Express Mail, Post Office to Addressee. The destination is 8301 Traford Ln, Springfield, Va. 22152-1637. A PVI Label will be purchased for postage, and the payment will be made by a VISA credit card.
2. A Customer is mailing a 1lb., 8 oz. package via Express Mail. Post Office to Addressee, the destination is 165 A St., Amsterdam, NY 12010. The postage is paid through a Corporate Account #985214
3. Customer is mailing a 8 oz. parcel via Express Mail, Post Office to Post Office, the destination is Main Post Office, Dallas, TX 75215. Postage is paid through Federal Agency Account. The account number on the label is #40116270.

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Module 7:

Acceptable Payment Methods

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Module 7: Acceptable Payment Methods

Terminal Objective

Upon the completion of this module future Associates will be able to explain the features and benefits of the USPS Credit/Debit Card Program.

Enabling Objectives

Upon the completion of this module future Associates will be able to:

- Define the various credit/debit cards that are accepted.
- Understand what is an acceptable purchase with a credit card.
- Understand what is an acceptable purchase with a debit card.
- Describe the components of a credit/debit card machine.
- Describe the components of a credit card sale.
- Describe the components of a debit card sale.
- Process a credit/debit card sale.
- Explain the close out adjustment process.
- Explain the features of the Cash Back option.
- Explain other acceptable payments for postal goods and services.
- Explain counterfeit currency.

Time Allocated for module: 45 minutes

Instructional Methods: Discussion, Demonstration, Overheads and Hands On Exercises

Summary of Instructional Plan:

The facilitator discusses and demonstrates the acceptance procedures and processing of Debit/Credit Card transactions.

Materials Required:

Instructor: IRT/POS ONE, Rip Chart, Colored Markers, TRANZ 380, Training Credit & Debit Cards FI (Post Office Accounting Procedures), PUB-348 Overhead/Transparencies.

Students: Workbook, Pens or Pencils

Presentation


Credit cards accepted by the USPS

Currently, the cards accepted by the USPS are; VISA, Mastercard, American Express, Discover, JCB, Diners Club/Card Blanche.

Debit Cards accepted by the USPS

Currently, all debit card networks are accepted.

Acceptable purchases with a credit card.

 **Note to Facilitator:** Use job aide overhead transparency
EXHIBIT 10 (Acceptable purchases with credit card)

Under our credit/debit card program ALL POSTAL PRODUCTS and SERVICES can be purchased by a customer using their credit card, with the following exceptions;


- Bulk Mailing and related application and annual fees.
- Periodicals postage and related fees.
- Permit Imprint revenue and related application and annual fees.
- Trust fund deposits and related fees (including, but not limited to Express Mail corporate accounts, permit imprints, business reply/postage due, periodicals).
- Postage meter settings and on-site meter settings, initial and subsequent.
- Pre-cancelled stamps and related fees
- Money Orders and money order fees
- COD funds, Money by wire (principle and fees).
- Passport fees.
- Employee debts.

Acceptable purchases with debit card

Under the credit/debit card program ALL POSTAL PRODUCTS and SERVICES can be purchased by a customer using their debit card with the following exception;

- Passport fees (debit card only, used for money order).


Components of a credit/debit card machine

 **Note to Facilitator:** Use job aide (Using the TRANZ 380 identify the following components)

There are five components to a credit/debit card machine, they are,

1. The TRANZ 380 credit/debit terminal. This is the machine currently used by the Postal Service to process an acceptable credit/debit card transaction.
2. The swiping device. This is section in which the credit/debit card is swiped.
3. The Printer and Ribbon. NOTE TO FACILITATOR: Demonstrate changing the ribbon and paper in the terminal. Mention that the spindle for the paper is not to be thrown away.
4. The on-light and paper low light. NOTE TO FACILITATOR: Explain the importance of not leaving the paper low in the terminal at the end of their tour.
5. Identify the pin pad.


Components of a credit card sale

 **Note to Facilitator:** Use Exhibit 11 (Credit/Charge Card Sale) and emphasize the following talking points.

- The critical components that make up a successful credit card sale start with;
- When you are handed the card by a customer you **must** verify there is a signature in the signature block, on the back of the card. If there is no signature you should not accept the card and should request another card or suggest another payment option. This is a national credit card policy that all cards must be signed, the card is not valid unless signed.
- After verifying a signature in the signature block, swipe the credit card and key in the last four digits of the credit card on the credit/debit card terminal then hit the ENTER key. Compare the credit number against the number displayed on the TRANZ 380. If there is a mismatch clear the machine and repeat the steps. Once you verify the credit numbers match hit ENTER, you will be prompted for your CLERK ID, press ENTER then you will be prompted for your PASSWORD press ENTER.
- Enter the amount of sale and hit the ENTER key. The terminal will begin to process the sale.

- When the process is completed the TRANZ 380 will print out a receipt. After the customer signs the receipt, this is very important, you **MUST** compare the signature on the card with the signature on the receipt. If there appears to be a mismatch you should request another form of payment and void the sale. When the sale is completed hand the card and the customer copy of the receipt back to the customer.


Components of a debit card sale

 **Note to Facilitator:** Use Exhibit 13 (Components of a Debit Card Sale) and emphasize the following talking points.

The critical components that make up a successful debit card sale start with;

The Sales and Services Associate pressing the #6 (debit) key. The terminal will prompt you for your clerk ID input your ID and press ENTER. The terminal will then prompt you for your PASSWORD, input your password and press ENTER. The terminal will now prompt you for the AMOUNT OF SALE? input the amount.

The terminal will then prompt for the customer PIN (Personal Identification Number) The terminal display will read WAITING FOR PIN. The PIN pad will beep indicating it is now ready for the customer to input their PIN, the PIN pad will display ENTER PIN, "ENTER" TOTAL \$ AMOUNT OF SALE. Hand the pad to the customer and request they press ENTER when completed. The TRANZ 380 will print out a receipt hand the customer copy and card back to the customer.

 **Note to Facilitator:** Have each Future Associate demonstrate performing a transaction using TRANZ 380.

The close out adjustment


The close out adjustment is used when Account Identifier Code (AIC/GLA) 762 (credit card) and AIC/GLA 772 (debit card) do not match the totals on the TRANZ 380 Clerk Report.


Before you make an adjustment you should verify your daily credit/debit card receipts to be sure that they match the report. Once you have determined the accuracy or the Clerk Report and a mismatch still exists to correct AIC/GLA 762 or 772 you need to subtract, or add, the difference on your retail equipment.

The Cash Back Option

The Cash Back option offers our retail customers the opportunity to receive up to \$50 cash back, in increments of \$10.00, during their visit to your retail counter when they choose a debit card as their choice of payment. Cash back will only be offered if the Sales and Services Associate has “cash available.” There is no minimum purchase amount and there is no limit to the amount of times a customer can request cash back during one 24 hour period. However, each cash back request must be limited by a separate purchase and paid for with an on-line debit card. An on-line debit card requires a customer to enter a PIN. **NO PIN, NO CASH.** Cash retained limits must not be increased to accommodate cash back.

The Sales and Services Associate should follow all the steps listed for a successful debit card sale.

 **Note to Facilitator:** *Demonstrate the Cash Back on the specific retail equipment. Explain the feature of customer not having to pay “ATM” service fee.*

 **Note to Facilitator:** *Have participants go to F-1, Post Office Accounting Procedures, Sec. 311. Review and discuss this section.*

Examples of acceptable payment methods are:

- Cash
- Debit/credit
- Personal/Business Checks
- Travelers Checks
- Postal/Non-Postal Money Order
- Cashiers Checks
- Certified Checks

Counterfeit Currency

 **Note to Facilitator:** *Review PUB 348*

Counterfeiting larger denomination of US currency bills is an increasing problem. The best method is to compare suspect bills with a genuine bill. If you are suspicious of a bill, notify your supervisor.

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Module 8:

Customer Relations

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Module 8: Customer Relations

Terminal Objective

Upon completion of this module, future Associates will be able to explain or demonstrate the interpersonal communication skills to effectively conduct retail transactions and be able to ask the right questions in order to provide every customer with the perfect transaction.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Demonstrate the components of GIST.
- Explain CSM (Customer Satisfaction Measurement) Ease Of Use (EOU) index.
- Explain the Mystery Shopper program.
- Explain PS Form 4314C
- Explain the Corporate Call Management concept

Time Allocated for this Module: 45 minutes

Instructional Methods: Discussion, Presentation, Role Play, Demonstration

Summary of Instructional Plan:

Facilitator introduces the components of GIST, explains the CSM, EOU Index, and the Mystery Shopper Program. **Note: A representative from District Retail may cover this module—consult local district policy. Provide a copy of module to assist in presentation to ensure key points are presented.**

Materials Required:

Instructor: GIST, Rip Chart, colored markers, overheads, PS Form 4314C

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION

The facilitator will introduce the video, “GIST”, highlighting the importance of customer service and good work ethics. After the completion of the video, the facilitator will lead a short discussion on the highlighted points noted prior to showing video.


 **Note to Facilitator:** View Exhibit 13 (*Think Retail/Increase Sales*)

Facilitator will explain the components of GIST. The perfect transaction encompasses the entire retail experience for postal customers. It includes clean lobbies that are stocked with forms and supplies and professionally attired, friendly retail professionals who are educated about the products and services offered by the Postal Service. The retail professional will follow the enhanced GIST model below during every retail transaction conducted.


Greet

- Personalize the greeting by using the customer’s name (if known).
- Greet with warmth and friendliness.
- Make eye contact with each customer.
- Greet every customer with a smile.
- Always be courteous and professional.
- Apologize for all problems or concerns without blame.

Inquire

 **Note to Facilitator:** Review the following principles with the future Associates that makes the Inquiry section more effective. Such as:


- Listen attentively.
- Do not attempt to predetermine the customer’s needs.
- Allow the customer to finish speaking.

 **Note to Facilitator:** Place Exhibit 14 (*Robots*) and 15 (*A successful transaction*) on the overhead

Suggested questions to help determine your retail customers needs.

 **Note to Facilitator:** Place Exhibit 16 (*How soon does it have to be there?*) on the overhead

- How soon do you need this article to arrive?


 **Note to Facilitator:** Place Exhibit 17 (Insurance) on the overhead

- How much insurance do you need?


 **Note to Facilitator:** Place Exhibit 18 (Proof of Delivery) on the overhead

- Do you need proof of mailing or delivery?

Sales and Services Associates should always keep in mind the HAZMAT and Aviation Security issues during the Inquiry phase. If a customer presents a packaged item to be mailed, one additional consideration needs to be given.

 **Note to Facilitator:** Place Exhibit 19 (Question Customers) on overhead Ask the customer “Are the contents perishable, fragile or potentially hazardous.” This will not only guarantee a satisfied customer but also satisfied partners throughout the processing and delivery phase.

Suggest


 **Note to Facilitator:** Place Exhibit 20 (Educate the Customer) on the overhead and review the following principles with the future Associates that makes the Suggest section more effective. Such as:

- You’re Educating our Retail Customers
- Consider the Cost of Service to the Customer
- Service Standards, Special Services


The Suggestion phase is your opportunity to use your training and understanding of Postal Products and Services to educate your Retail customer. In this phase you will either satisfy or frustrate your customer. If you listened to what they said you should now be ready to truly assist.

 **Note to Facilitator:** Place Exhibit 21 (Debit/Credit Card) on the overhead

- Would you like to pay with your credit or debit card?
- Is there anything else I can do for you today, perhaps.....?

 **Note to Facilitator:** Place Exhibit 22 (Additional Item) and 23 (More Value Selling Ideas) on the overhead

Thank

 **Note to Facilitator:** Place Exhibit 24 (Thank the Customer) on the overhead and review the following principles with the future Associates that makes the Thank section more effective. Such as: You Thanking the Customer for Investing their Time with you, You're Thanking your Customer for their Business with our Company.

- Make sure customer has receipt, correct change and products
- Express sincere gratitude
- Promote return business
- Provide customer with supplies for future

The Thank phase is your opportunity to bring them back into your retail office. If you Greeted them professionally, Listened to them, and Suggested a product or service that met their needs, genuinely Thank them.

Clearly, when a customer comes into purchase only a single stamp, the employee will not need to ask all questions listed above. However, if employees keep GIST principles in mind during every transaction, employees will ask appropriate questions during each transaction where it is applicable.

Facilitator will explain 4314C

Exercise: GIST, Role play with mock lobby.

Using GIST, facilitators should act out a role play scenario amongst themselves, then they should pair off, one facilitator with one Associate, from the class.

Customer Satisfaction Measurement

The facilitator will explain the Customer Satisfaction Measurement system (CSM). It is comprised of the results of surveys that are mailed on a continuous basis to both business and residential customers to see how our customers "perceive" their experience with postal products and services. Telephone surveys are conducted with national and premier business account customers.

Ease of Use Index

The facilitator will explain the ease of use (EOU) Index. It is drawn from specific CSM survey questions. We want to know how our customers “perceive” their experience with postal products and services. Ease of use (EOU) is defined as having products and services that are simple to use, convenient, understandable, and accessible.

Mystery Shopper Program

The facilitator will explain the Mystery Shopper program. The Mystery Shopper program is not a “new” program, but one that has been successfully used in retail units for years. The original idea was to send an individual into a retail unit to “shop” and see how they rate the product(s) and service(s) provided. There are many benefits to be garnered from the program: checking the cleanliness of the retail unit, the friendliness of your retail staff, the availability of products, etc. For the USPS, the main benefit from the Mystery Shopper program is to test the sales skills of our retail work force through the eyes of our customers.

Any future changes to the mystery shopper question requirements will be consistent with GIST principles.

The Mystery Shopper represents the customer’s experience at the time of the shop. GIST is a program that promotes improving the customer’s experience for every transaction. Mystery Shopper feedback can be a powerful tool for improving customer service as well as increasing revenue.

Corporate Call Management

The Corporate Call Management (CCM) program was developed to allow the Postal Service to offer its customers an easy way to get accurate and reliable information about the Postal Service and its services. This program creates a world class service operation for consumers, small business and smaller nonprofit organizations. When it is fully deployed, the network will handle over 200 million calls a year on a range of topics including ZIP Codes, rate information, product tracking, customer complaint handling, and service requests. Most importantly, all Postal customers will have access to the same, standardized information and procedures no matter where they are calling from or what time of day or night. CCM has built, tested and evaluated each of the elements in the vision.

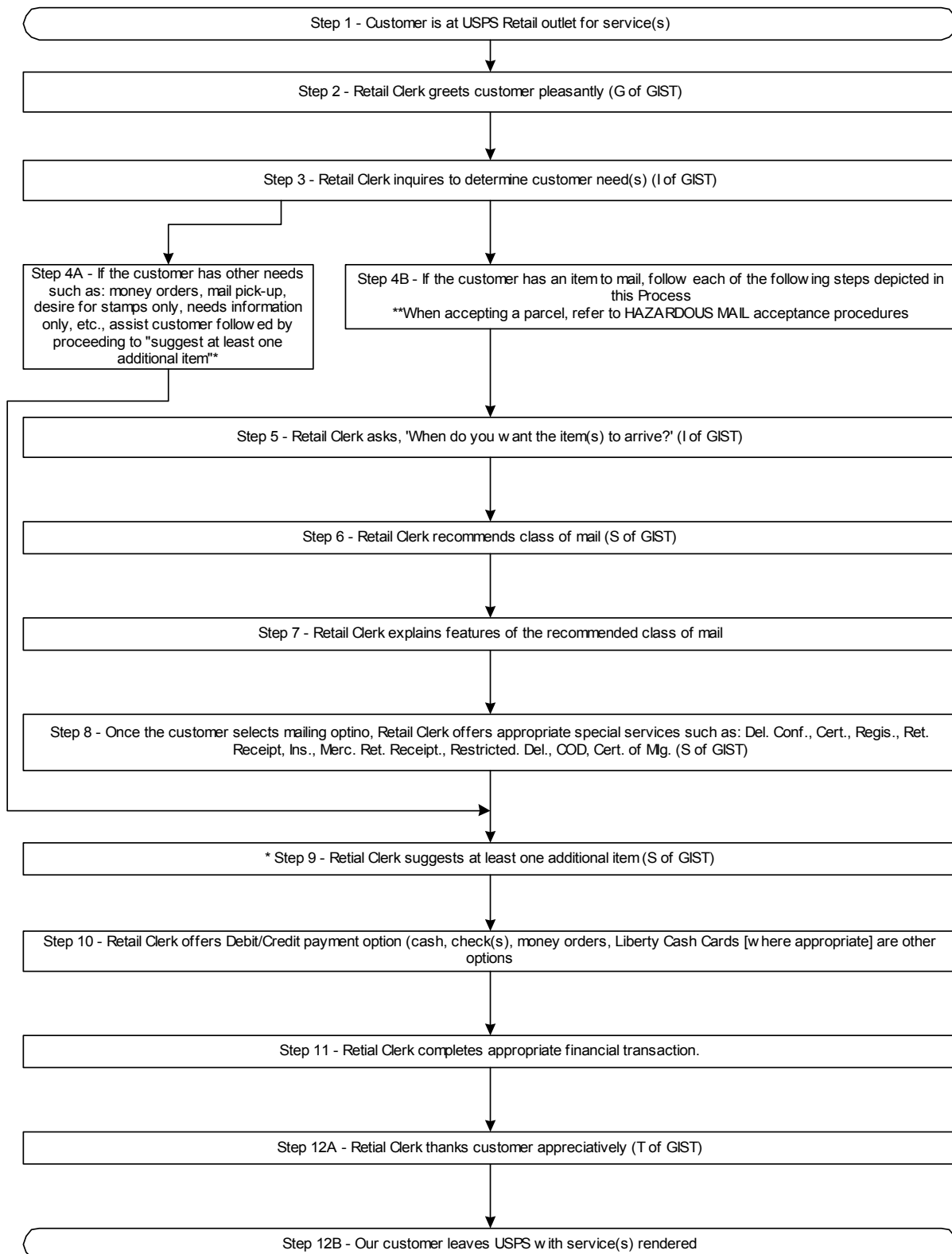
Standard Retail Transaction

- Step 1 - The typical and logical starting point for the transaction
- Step 2 - Demonstrate some form of positive and friendly greeting to each customer.
- WHY? - Surveys reveal that customers are more forgiving for long waits, etc. if greeted pleasantly. Also, pleasant greetings are important to customers.
- Step 3 - A critical step where the Retail Associate needs to gain full understanding as to what the customer needs. To set up the next step, the Associate determines whether it is an item to mail, or something else.
- WHY? - Most customers don't know our full range of products and services, and they should not be expected to know. It is the Associate's job to ask the right questions that will help them understand what the customer really needs.
- Step 4A - This is for a customer WITHOUT AN ITEM TO MAIL. Other needs are dealt with at this point; for example, a customer who is picking up mail or purchasing a money order.
- Step 4B - This is for the customer who HAS A SPECIFIC ITEM TO MAIL. If it is a package, do a visual inspection and follow HAZARDOUS MATERIALS procedures.
- WHY? - This is an FAA requirement that is regulated by the Department of Transportation.
- Step 5 - If there is an item to be mailed the Associate should ask questions related to the time of arrival.
- WHY? - This sets up the ability to make the right recommendations of the classes of mail.
- Step 6 - Recommend a class of mail that will meet customer needs.
- WHY? - This gives the customer options for them to make a selection based on their needs and what they are willing to pay.

- Step 7 - Explain the features and benefits of the recommended class(es) of mail. For example, Express Mail service offers overnight guaranteed service, where Priority would be in the 2 to 3 day range without a guarantee.
- WHY? - This step helps to assure that the Associate and customer have agreed on the right choice.
- Step 8 - Once the class of mail has been determined, advise the customer about any special services we offer that are available with that class of mail.
- WHY? - This question or another kind of inquiry can clear up customer's possible misconception that we always offer automatic insurance, or that we keep record of mail that is processed and delivered.
- Step 9 - Suggest a product and/or retail item.
- WHY? - Because we have revenue generating possibilities by offering at least one additional item. For example, current/popular commemorative stamps, phone cards, envelopes, etc.
- Step 10 - Not all of our customers know that we accept debit/credit cards for payments. For the customer with cash in hand, educate the customer by telling them that we do accept debit/credit cards for payment.
- WHY? - It may be convenient for the customer and it costs less to process for the Postal Service.
- Step 11 - Retail Associate must offer correct change, process debit/credit/Liberty Cash cards accurately and secure all funds.
- WHY? - This maintains business, Associate and customer integrity.
- Step 12 - This is where we thank and close out the transaction.
- WHY? - Customers are why we exist and we want them to leave our retail outlets pleased with the services rendered. In recent research when customers were asked what is the one thing the Postal Service can do for you, the overwhelming response was "appreciate my business".

RETAIL SALES SKILLS PROCESS

(8/08/2000)



RETAIL WORKFORCE STRATEGIES



January 14, 2000

AREA RETAIL MANAGERS
DISTRICT RETAIL MANAGERS

SUBJECT: Joint GIST Memo

Enclosed is a memo jointly signed by me and Cliff Guffey, the Clerk Craft director of the APWU. Cliff reports directly to Moe Biller. Cliff has expressed to me, repeatedly, his concerns about some of the negative perceptions clerks have about the Mystery Shopper program. We agreed that some clarification about expectations is in order.

We agreed that expecting clerks to follow a specific script, word for word, with every customer is not desirable, especially to customers. We are not trying to force our clerks to become robots. We also agreed with the principles established with the GIST program and that if clerks follow these principles with every customer, every time, they will also meet the expectations of the Mystery Shopper program. Clerks do need to understand, however, that asking a customer, "Can I help you?" does not satisfy the inquire part of GIST.

The APWU has already distributed this memo. It is also included in the course materials for the new Sales and Services Training program for new clerks. Please distribute this memo to existing clerks and supervisors as you see fit. Thank you.

Nancy M. Latch
Manager

Enclosure

475 L'Enfant Plaza W SW Room 4352EB
Washington DC 20260-2404
202-268-5548
Fax: 202-268-6087

RETAIL WORKFORCE STRATEGIES



October 7, 1999

SUBJECT: MYSTERY SHOPPER - FOCUS ON GIST

Our retail customers have more choices today than they've had in the past. They have choices among the products and services we offer and they have choices about who provides them. Making sure each customer leave the retail counter satisfied with their purchase and experience is our focus.

There has been confusion in the past regarding Mystery Shopper Program and whether it establishes new requirements that are at opposition with GIST (Greet-Inquire-Suggest-Thank). The two programs support each other in our goal to improve the customer experience.

The Mystery Shopper Program provides information on our retail performance from a customer's perspective. All large retailers conduct some sort of mystery shop to help identify areas for improvement and ensure customer satisfaction.

What we require of employees when the customer is a mystery shopper is what is expected of them with every customer. It can be summarized within our GIST principles.

GIST Element

MYSTERY SHOPPER Element

Greet

Did the employee greet you pleasantly as soon as you reached the counter?

Did the employee smile and make eye contact?

Inquire

Did the employee ask how soon you wanted the item to get to its destination?

Suggest

Did the employee offer a specific class of mail?

Did the employee explain the features of the recommended class of mail?

Did the employee offer any special services?

- 2 -

Did the employee inform you that the USPS accepts credit and debit cards?

Did the employee suggest an additional item to purchase?

Thank

Did the employee thank you at the end of the transaction?

Clearly, when a customer comes in to purchase only a single stamp, the employee will not need to ask all questions listed above. However, if employees keep GIST principles in mind during every transaction, employees will ask appropriate questions during each transaction where it is applicable.

Any future changes to the mystery shopper question requirements will be consistent with GIST principles.

The Mystery Shopper represents the customer's experience at the time of the shop. GIST is a program that promotes improving the customer experience for every transaction. Mystery Shopper feedback can be a powerful tool for improving customer service as well as increasing revenue.

Nancy M. Latch
Manager
Retail Workforce Strategies

C.N. "Cliff" Guffy
Director, Clerk Division
American Postal Workers
Union, AFL-CIO

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Module 9:

International Mail

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Module 9: International Mail

Terminal Objective:

Upon completion of this module, the future Associate will be able to sell, accept, and process international mail services.

Enabling Objectives:

Upon completion of this module, the future Associate will be able to:

- Identify the features and customer benefits of the classes/types of International Mail.
- Identify the features and customer benefits of the available international mail services
- Explain how to accept and process international special services.
- Explain how to use the *International Mail Manual* to determine the weight, size limits, postage rates, and special conditions for international mailings.
- Identify the forms to use for accepting International Mail, Global Express Guaranteed, Global Express Mail, Global Priority Mail and demonstrate how to complete them.

Time Allocated for Module: 1 hour, 45 minutes

Instructional Methods: Discussion, Presentation, Demonstration, Mock Lobby (simulation), and exercises on user equipment.

Summary of Instructional Plan:

The instructor introduces the module by discussing the purpose, features and benefits of International Mail. Future associates will use the *International Mail Manual* (IMM) to complete the exercises. The instructor presents information on international mail policies and procedures and shows future associates how to complete the appropriate forms. Future associates will use the equipment to perform exercises in accepting International Mail and participate in role-plays.

Materials Required:

Instructor: Rip Chart, markers, Aerogramme, IRC's, PS Forms 2976 and 2976-A, PS Form 8099 – Recorded Delivery, GXG air Waybill/Shipping Invoice, cloth measuring tape, examples of packages. GXG, Global Express and Global Priority envelopes.

Future Associate: workbook, pen and pencils.

Presentation

1. Introduction

Facilitator will ask future associates what do they know about International Mail. It's potential for lost revenue and it's benefits to the postal customer. Introduce the IMM.

2. The International Mail Manual (IMM)

Have future associates turn to the index of countries and localities and tell them to use this when they cannot find certain countries listed in the individual country listing (ICL). This also lists countries that are U.S. Possessions and use domestic rates. Tell future associates to find Palau. Have a volunteer read the information listed on Palau. Localities that are not listed separately in the ICL's under their own heading are listed with the country identified in parentheses. Have another associate look up Scotland in the individual country listing and then have them turn to the index of countries and localities. Have associates look up Guam. Tell future associates that this index is a cross-reference and should be used when they are trying to locate a country and/or locality.

To find postage rates and other mailing conditions you need to find the individual country listing (ICL) in the IMM. Countries are listed alphabetically and page numbers are provided for easy reference. After they have found the country listing turn to the page number listed for information regarding sending international mail to that country. Look for restrictions, prohibitions, observations, size limits, and special services.

Articles that are prohibited by the destination country are nonmailable. Customers should be advised of restrictions when mailing items that are restricted by the destination country and the mail is subject to the import requirements of that country. Items that are not acceptable for domestic mail are also nonmailable in international mail.

Stress the importance of using the IMM to determine if an item can be accepted for international mail.

3. Categories of International Mail


There are five categories of International Mail:

- Global Express Guaranteed (GXG)
- Global Express Mail
- Global Priority Mail
- Global Airmail
- Global Economy

Global Airmail and Global Economy

The provisions of the Universal Postal Convention to which the USA is a signatory govern Global Airmail and Global Economy mail. It includes the following classes:

- **LETTER-POST** – contains letters and/or merchandise subject to weight and size restrictions. The prohibitions, restrictions, and observations of the destination country regulate the combination of letters and merchandise. Not all countries will allow letters to accompany merchandise. Letters are defined as mail containing personal handwritten or recorded communications having the character of current correspondence. (IMM 241.1) Letter-post can be sent as Airmail or Economy. Airmail rates start at 1 ounce; economy rates start at 1pound.

 **Note to Facilitator:** Using IMM issued January, 2001 show the future associates the weight and size limits for Letter-post. (IMM 243) Have packages and tape measure available to demonstrate how to measure Letter-post. Have future associates role-play measuring and weighing Letter-post.

Weight and size limits – Letter-post


- Minimum size: 3 ½ x 5 ½
- Maximum length, height, depth (thickness) combined: 36 inches.
- Maximum weight: 4 pounds
- Rolls, maximum length: 36 inches or length plus twice the diameter combined: 42 inches
- Envelopes and packages maximum length: 24 inches
- Nonstandard surcharge: 11¢ for items 1 ounce or less if over 11 ½ inches in length, 6 ½ inches in height or exceeds ¼ inch in thickness.

Other services available – Letter-post

- Registered Mail
- Recorded Delivery
- Return Receipt
- Restricted Delivery

Discuss Aviation Security with future associates (round date all international packages).


If Letter-post contains dutiable merchandise, the sender must complete customs declaration, PS Form 2976 (green) and attach it to the address side of the package. If the sender does not want the nature of the contents shown on the outside of the package, or if the value of the contents exceeds the amount stated on PS Form 2976 or the IMM, the customer must complete customs declaration, PS Form 2976-A and enclose it in the package. Under those circumstances, only the upper portion of PS Form 2976 needs to be affixed to the address side of the package.

 **Note to Facilitator:** Use Exhibit 25 (International Mail Addressing) Show future associates the proper label placements and addressing of International mail note: use rip chart to demonstrate until a new overhead is available.


The complete address of the sender, including ZIP Code, must be shown in the upper left hand corner of the envelope or package (printed in ink or typewritten) as per postal and aviation security regulations. Air Mail stickers or ink stamps should be placed in the lower left hand corner on the front and rear of the package. The last line of the address must show only the country name, written in full (no abbreviations) and in capital letters. The country name must be in English.

Aerogrammes are air letter sheets that can be folded into the form of an envelope and sealed. Aerogramme service is available to all countries. Registry service is available to most countries. No enclosures are permitted.


International Reply Coupons (IRC's) – a sender of a letter may prepay a reply by purchasing IRC's. When a customer brings in a coupon from another country it is exchanged for the stamp equivalent of one ounce of postage to the country in which a customer wishes to send the letter.

 **Note to Facilitator:** Tell the future associates they should write the amount of postage on the coupon in the amount that was exchanged.

Recorded Delivery service is the equivalent of domestic certified mail. The Recorded Delivery fee is in addition to postage and using PS Form 8099. It provides the mailer with a numbered mailing receipt, and affords the opportunity to obtain confirmation of delivery through the purchase of a separate return receipt (PS Form 2865) for an additional fee.

 **Note to Facilitator:** Stress to future associates that this service is available to a limited number of countries. (IMM ____)


Parcel Post

Parcel Post resembles domestic zone-rated Package Service mail. Merchandise is permitted, but written communications having the nature of current and personal  correspondence are not permitted. Parcel Post may be insured (IMM 322)

Note to Facilitator: refer to ICL's for country requirements and availability. Have future associates look up the prohibitions and restrictions for Saudi Arabia and Canada.

Weight and Size limits:

- See Individual Country Listings. Maximum length and girth combined is 79 inches to MOST countries. Some destinations permit larger packages, while other countries restrict the size and weight limits to a smaller size.

 **Note to Facilitator:** Have future associates look up size restrictions for _____ , _____ & _____ .

Global Express Guaranteed™ (GXG)

In response to the needs of our customers for a guaranteed, time definite international expedited delivery service the United States Postal Service has formed a business alliance with DHL Worldwide Express to introduce Global Express Guaranteed (GXG).

GXG is a high-quality, competitively priced, guaranteed international expedited product that will improve the U.S. Postal Service's global performance, build customer confidence, and respond to the voice of the customer and voice of the business goals.

This value-added, expedited service is a two-business day guaranteed service to many major metropolitan destinations, with day specific guarantees to all other locations. See country specific service commitment information in GXG service guide. Service is available from many US metropolitan markets to over 200 countries worldwide.

Products, Features and Benefits


Global Express Guaranteed has unique features that are designed to add value to the retail customers' use of the U.S. Postal Service products. The following are important facts that you need to know about Global Express Guaranteed.

- All GXG destinations have a delivery guarantee
- Two-business day guarantee to most destinations, day specific guarantees apply to all other locations.
- Guaranteed service for business documents and merchandise
- Refunds for delayed articles
- On line tracking and confirmation of delivery by contacting the USPS web site: www.usps.com.
- GXG service information at www.gxg.usps.com
- Customer service, tracking, and confirmation of delivery available 24-hours, seven-days a week by calling 800-222-1811.
- Claims and refunds are initiated by calling 800-222-1811.
- All GXG shipments are automatically insured for up to \$100 or the value limitation of the destination country whichever is less.
- Additional insurance is available for a nominal fee.
- Delivery is not available to APO, FPO, or foreign PO Boxes.

Global Express Mail® (EMS)

Global Express Mail can expect to be delivered in 2 – 3 days to over 180 countries around the world. Shipments are insured without charge for up to \$500 for merchandise and document reconstruction. The service standards that apply to domestic express mail shipments do not apply to Global Express Mail service.

Customs forms may be required. There are no refunds for the delay of Global Express Mail. The postal service is not solely responsible for handling Global Express Mail service. Use label 11-B for mailing all Global Express Mail articles. Post office to post office shipments is not permitted.


 **Note to Facilitator:** *Given that there are only two differences between a Domestic Express Mail label and a Global Express Mail label, “Country Code” & “No Guarantee” conduct the following exercise to reinforce the future associates understanding of an Express Mail label.*

Global Priority Mail™ (GPM)


Global Priority Mail is an expedited airmail letter service providing fast, reliable and economical delivery of all items mailable as letters or merchandise up to 4 pounds. Global Priority Mail items receive priority handling in the United States and in destination countries. Service is available only to destination countries identified in IMM 226.2. Service is available to over 50 countries around the world.

All items sent as letter class mail are accepted in Global Priority Mail provided that the contents are mailable and fit securely in the envelope. Global Priority Mail items may contain dutiable merchandise unless the country of destination specifically prohibits dutiable merchandise in letters. Any item that is prohibited in domestic mail is prohibited in Global Priority Mail.

Flat-rate envelopes are provided for customer usage. Items must fit comfortably within the flat-rate envelope without distorting or bursting the container. Do not use excessive tape to keep the envelopes from bursting. Use only one piece of tape to secure the flap.

 **Note to Facilitator:** Using the IMM, the IRT, or the POS ONE system, have the future Associates practice the following (POS ONE allows the associates to use the on-line Help function):

1. Have future Associates look up registered indemnity for Albania.
2. Have future Associates look up restrictions for mailing jewelry to Canada.
3. Have future Associates look up restrictions for mailing used clothing to Spain.
4. Have future Associates look up parcel post measurements for Republic of Korea (South Korea).
5. Have future Associates calculate fee for a 1 oz. letter to Canada. Is recorded delivery available?
6. Have future Associates mail a 3 lb. package airmail to Germany with \$500.00 insurance.
7. Have future Associates look up \$50.00 insurance fee for parcel post to Taiwan.
8. Have future Associates look up 2½ oz. letter to Mexico.

 **Note to Facilitator:** Refer to role play exercise in Appendix.

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Module 10:

**Return Receipt,
Restricted Delivery,
Return Receipt for
Merchandise and
Certificate of Mailing**

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Module 10: Return Receipt, Restricted Delivery, Return Receipt for Merchandise and Certificate of Mailing

Terminal Objective:

Upon completion of this module, future Associates will be able to sell, accept and process Return Receipts, Certificates of Mailing, Return Receipt for Merchandise Services and Special Handling.

Enabling Objectives:

Upon completion of this module: future Associates will be able to:

- Explain a Return Receipt-at time of mailing.
- Explain a Return Receipt-after mailing.
- Explain Return Receipt for Restricted Delivery.
- Explain Return Receipt for Merchandise Service.
- Demonstrate how to issue a Certificate of Mailing.
- Explain Special Handling Service

Time Allocated for this Module: 1 Hr.

Instructional Methods: Discussion, Presentation, Demonstration, Question/answer and Mock Lobby

Summary of Instructional Plan:

The instructor identifies and describes the purpose, features, and customer benefits of Return Receipts, and Certificates of Mailing and shows future Associates how to complete appropriate forms.

Materials Required:

Instructor: Rip Chart, colored markers, PS Forms 3811, 3811A, 3817, 2865 & 3804 and Handbook PO-130 and appropriate stampers


Future Associates: Workbook, pens or pencils, colored markers and Handbook PO-130.

PRESENTATION

Return Receipt-at time of mailing


There are two types of Domestic Return Receipts:


- PS Form 3811, Domestic Return Receipt
- PS Form 3811A, Return Receipt (after mailing)

 **Note to Facilitator:** Using Handbook PO-130, discuss the features and benefits of the following services.


Return Receipt Service is available for customers who want evidence of mail delivery. It is available for mail sent by:

- COD
- Express Mail Service
- Numbered Insured Mail Service over \$50.00
- Registered Mail Service
- Certified Mail Service
- Return Receipt For Merchandise

 **Note to Facilitator:** Explain Return Receipt Service must accompany a numbered service.

 **Note to Facilitator:** Give future Associates a PS Form 3811 to study the following points:

- A fee is charged for Return Receipt Service.
- The article must be endorsed "Return Receipt requested."
- Remember that a Return Receipt does not provide insurance for an article.
- After the article has been delivered to the addressee or the addressee's agent, the Return Receipt is mailed back to the sender.

 **Note to Facilitator:** Show and explain PS Form 2865 - Return Receipt for International Mail.

Return Receipt-after mailing

A sender may request a Return Receipt after mailing a Registered, Certified, COD, Express Mail, or Numbered Insured item by paying the required fee. The applicable fee is waived if the mailer can produce a receipt showing the applicable Return Receipt fee was paid.

To do so, the sender must complete PS Form 3811A and attach the proper fee and mail the PS Form 3811A to the delivery post office. The sender will be provided with the date of delivery and the name of the individual, company or organization that received the mail. This form must not be taken from the retail counter, it must be retained by the Sales and Services Associate.



Note to Facilitator: Show future Associates how to complete PS Form 3811A, domestic Return Receipt (after mailing)

Restricted Delivery Service

Restricted Delivery Service allows the mailer to direct delivery only to the addressee or addressee's authorized agent. The addressee must be an individual specified by name.

Domestic Restricted Delivery is only available for:


- COD Mail
- Numbered Insured Mail
- Registered Mail
- Certified Mail

Request at the time of mailing for a fee in addition to postage. Remember, Restricted Delivery Service is available without Return Receipt Service. You should recommend Restricted Delivery Service to meet customer's needs.

Return Receipt for Merchandise

Return Receipt for Merchandise is a form of Return Receipt Service that provides the sender with a mailing receipt, a Return Receipt, and a record of delivery at the office of address.

Unnumbered insurance is available. Restricted Delivery Service is not available. No Return Receipt can be requested after mailing. This service may not be used on international mail.

 **Note to Facilitator:** Show future Associates PS Form 3804, Return Receipt for Merchandise.

This service is available only for **merchandise** sent at the rates for:

- Priority Mail
- Package Services
 - ◆ Parcel Post
 - ◆ Bound Printed Matter
 - ◆ Media Mail
 - ◆ Library Mail

Both PS Form 3804 and 3811 must be used for Return Receipt for Merchandise.

Customers may request the Postal Service to deliver the mail without obtaining a signature by signing the waiver on PS Form 3804. This option allows the delivery employee to sign for the article on the first delivery attempt to the listed address, if the addressee or the addressee's agent is not available to accept the shipment.

If the waiver is selected, the customer is accepting the employees signature and date of delivery as proof of delivery.

Certificate of Mailing

Certificate of Mailing Service provides the mailer with evidence that the customer mailed an item. Once the article has been handed to the Sales and Services Associate, it **must** be retained by the Sales and Services Associate until mailing. A certificate is a document testifying to a fact. It does not provide a receipt showing that the article was delivered to the addressee and postal insurance is not provided against loss or damage. It must be prepared in ball point ink or typewritten.

PS Form 3817 is used for an individual (one) certificate for ordinary mail of any class.

The fee for this service is listed per item listed individually on PS Form 3817. The fee for certificates of mailing for three or more pieces of mail are listed on PS Form 3877.

Mailers must affix uncanceled stamps or meter stamps to cover the Certificates of Mailing fee(s). The Sales and Services Associate may affix a PVI to the Certificate at time of mailing. The stamps are canceled by the postmark of the mailing office.

Exercise



Note to Facilitator: Do a role-play where a customer requests a certificate of mailing.

Special Handling

Special Handling provides preferential handling in dispatch and transportation. Special Handling is available for 1st class/Priority Mail, and Standard B Mail. The Special Handling fee must be paid in addition to postage for each piece being mailed. Special Handling is required on parcels containing honey bees, and chickens, unless they are sent at the 1st class or Priority Mail Rates.

Articles should be endorsed "Special Handling" above the address and to the right of the return address.

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Module 11:

Certified Mail

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Module 11: Certified Mail

Terminal Objective:

Upon completion of this module future Associates will be able to sell, accept, and process certified mail.

Enabling Objectives:

At the conclusion future Associates will be able to:

- Explain the purpose of the service.
- Explain the features and customer benefits.
- Demonstrate the completion of the required forms.

Time allocated for module: 1 Hr.

Instructional Methods: Discussion, Presentation, Demonstration and Exercise.

Summary of Instructional Plan:

The Facilitator introduces the module by summarizing the topics to be covered, then presents the selling, acceptance, and delivery procedures. The Facilitator explains the policies and procedures and demonstrates how to compute the postage, collect payment, endorse the article, and date stamp the receipt of mailing. Facilitator shows future Associates how to use retail equipment.


Materials required:

Instructor: Rip chart, PS Form 3800, PS Form 3877, PS Form 3849, markers, pen and pencils, overheads

Future Associates: workbook, pen and pencils


PRESENTATION


Introduction

 **Note to Facilitator:** The facilitator will explain that Certified Mail provides a mailing receipt for a fee. A record of delivery is maintained at the post office that serves the addressee. No record is kept at the post office where mailed.

This service is available only for items sent by first-class mail (which includes Priority Mail) and may only be addressed for domestic mail (to include APO or FPO). If customer wants International Service check IMM for Recorded Delivery.

Postal insurance is not available for Certified Mail nor authorized for International Mail Service. Certified Mail Service is not available for Business Reply Mail.

 **Note to Facilitator:** Show the future Associates an example of a BRM letter. Exhibit 26 (Business Reply Mail)

 **Note to Facilitator:** Ask future Associates if they have ever used certified mail service, what they used it for, and discuss.

PS Form 3800, Receipt for Certified Mail

Mailers may use privately printed PS Form 3800 if they use same size and format and are printed in green and must be approved by the Postal Business Center.

Completing PS Form 3800

- Have customer complete the "Sent to" portion
- Determine applicable postage
- Write in the postage amount and certified fee
- Affix amount of postage to mail piece that reflects the total postage and services fees
- Round stamp the "postmark" portion
- Affix the Certified Mail sticker portion to the front of the mailing item above the delivery address and to the right of the return address.
- Detach the appropriate portion of form and give to customer.

Exercise

Give future Associates PS Form 3800, receipt for Certified Mail and have them read back of form. Show students how to complete the form. Have future Associates complete the form and enter in IRT/POS ONE.



Note to Facilitator: Future Associates complete the form then verify that all the key items were covered.

Firm mailing

- Used when three or more Certified Mail pieces are mailed at the same time.
- Sheets in PS Form 3877 firm book are the mailer's receipts.
- PS Form 3877's must be verified by checking number of items, Certified Mail number, names and addresses of addressees
- Affix prescribed postage to the items or check accuracy of postage already affixed.
- All copies must be round dated (original copy of PS Form 3877 is retained at office of mailing).

Exercise




Note to Facilitator: Give future Associates one copy of PS Form 3877, firm mailing book and show students how to complete the form. Have future Associates complete the form. Exhibit 27 (Firm-Mailing Book)

Holding Period

- 15 days (unless less time indicated by mailer)
- Second/Final notice (PS Form 3849) issued after five (5) calendar days from first delivery attempt.
- Return entire mail piece to sender if not claimed within fifteen (15) days from first delivery attempt.

Exercises

 **Note to Facilitator:** Solicit responses from future Associates to the following questions:.


1. Certified Mail Service is available only for:
 - A. Express Mail Service
 - B. First-Class Mail/Priority Mail**
 - C. Standard
 - D. International Mail

2. Certified Mail Service provides the sender with:
 - A. Postal Insurance
 - B. A mailing receipt**
 - C. A customs declaration
 - D. None of the above

3. Certified Mail Service may be mailed with the following special services:
 - A. Insured
 - B. Registered
 - C. Express Mail
 - D. None of the above**

4. The Customer benefits of Certified Mail Services include:
- A. Receipt for the sender and a record of delivery**
 - B. Receipt for the addressee
 - C. Record of delivery at the office of the sender
 - D. None of the above
5. Certified Mail is dispatched and handled in transit as:
- A. Express Mail
 - B. First-Class Mail/Priority Mail**
 - C. Standard Mail
 - D. None of the Above
6. Which of the following is the receipt for Certified Mail:
- A. PS Form 3811
 - B. PS Form 3812
 - C. PS Form 3800**
 - D. PS Form 8300

IRT/POS Exercises:

 **Note to Facilitator:** Role-play the following exercise by having a future Associate play the customer and another a Sales and Services Associate.

1. Customer comes in with a Business Reply envelope and wants to send it Certified Mail.

What Action is to be taken?

Correct Response - No, you can not certify a Business Reply envelope.

Day Two Review

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Day Two Review

Terminal Objective

Upon completion of this module, future Associates will be able to explain the days lessons.

Enabling Objective

Upon the completion of this module, future Associates will be able to demonstrate the objectives of the modules presented the second day through questions and answers.

Time Allocated for this Module: 45 minutes


Instructional Methods: Postal Family Feud Game

Materials Required

Instructor: Sample questions, two “noisemakers”

Future Associates: No materials required

Presentation

 **Note to Facilitator:** Conduct review in the format of the game show “Family Feud”.

- Separate class into two teams. Have teams come up with their “postal family name”.
- Give each team some type of noise maker (i.e. bell, horn, etc.) to use in signaling their response to question.
- Family teams should discuss question posed and one person acts as spokesperson with their response.
- Facilitator asks questions (can use following or make up your own):

- 1) Name the four components of GIST
- 2) Customer presents package for mailing. What inquiry do you make? (Facilitator – ensure HAZMAT question is part of response.)
- 3) What are the five categories of International Mail?
- 4) Name at least three reference resources available to determine weight and size restrictions for International mailings. (Facilitator – IMM, Postal Bulletin, POS)
- 5) What is the purpose of a return receipt?
- 6) Name the four services which domestic Restricted Delivery can be sold. (Facilitator – COD, numbered Insured, Registered, and Certified Mail)
- 7) What is the difference between Certificate of Mailing and Return Receipt?
- 8) Define Certified Mail.
- 9) Define the purpose of a Firm Mailing book.
- 10) What are the notice/holding periods of Certified Mail?
- 11) What is our safest, most secure service for valuables?
- 12) Identify three items that are unacceptable for mailing Registered Mail.
- 13) Name a key difference between Domestic and International Registered Mail.
NOTE TO FACILITATOR:—insurance coverage is available for up to \$25,000 on domestic shipments. Coverage availability for international shipment varies based on destination.)

- 14) What is automatically included with Express Mail Service?
- 15) What is the maximum weight specification for Express Mail Service?
- 16) What is an Express Mail flat rate envelope?
- 17) Name two features of Express Mail.
- 18) Name four types of Express Mail.

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Day 3

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Module 12:

Registered Mail

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Module 12: Registered Mail

Terminal Objective:

Upon completion of this module future Associates will be able to sell, accept and process Registered Mail.

Enabling Objectives:

At the conclusion of this module, future Associates will be able to:

- Explain the purpose of Registered Mail
- Explain accountability and security procedures for Registered Mail.
- Explain the preparation requirements and completion of forms for the acceptance of Registered Mail.

Time allocated for module: 1 Hr.

Instructional Methods: Discussion, Presentation, Demonstration, and Equipment Exercises

Summary of Instructional Plan:

The facilitator introduces the module and explains the purposes, features, and customer benefits of Registered Mail Service. The facilitator shows future Associates the procedures for accepting Registered Mail and emphasizes the importance of accountability and security in handling these articles.

Materials required:

Instructor: Rip chart, markers, pen and pencils, overhead transparencies, PS Forms 3806 & 3877, Firm Mailing Book, Label 200, Round Dates, Video "Registered Mail Overview (VHS-64-13)," samples of acceptable and unacceptable Registered Mail Articles.

Future Associates: workbook, pen and pencils, and blank envelopes

PRESENTATION

Introduction



Note to Facilitator: Show the video: “Registered Mail - An Overview”.

Registered Mail is designed to provide added protection for valuable and important mail. It is the most secure service the USPS offers. Once you determine that the customer does indeed want Registered, examine the article for acceptability.

Registered Mail differs from other types of mail service in that it is accounted for at each stage of its handling. Only First-Class/Priority Mail can be registered and must be brought to the post office, station or branch.

Business Reply Mail may not be registered and business reply envelopes may not be used for Registered Mail.

Acceptable Registered Mail


The mail must have the complete names and addresses of both sender and addressee.

The face of the letter or package to be mailing Registered Mail must be a minimum size of 3 ½” x 5” regardless of thickness. International Registered Mail must be at least 3 ½” x 5 ½”.

Packages/containers should be of sufficient strength to withstand processing through the mails. You should courteously refuse to accept an article not properly packaged.


Customers should use good quality envelopes with mucilage all the way to the edge of the flap. Letters or large envelopes (flats) which are completely sealed and also have paper strips or paper tape across the intersections of the flaps are acceptable.

Window envelopes must have panels covering the opening to be acceptable. If a transparent panel is glued to the envelope, it may only contain matter without intrinsic value. If the panel is part of the envelope, it may be used.

 **Note to Facilitator:** Show the future Associates an example of an acceptable Registered Mail package sample.

Unacceptable Registered Mail

- Envelopes or packages which appear to have been opened or resealed, or are otherwise improperly prepared.
- Self sealing envelopes.
- Padded mailers, except for International Mail only.
- Other envelope materials such as TYVEK, Plastic or glossy coated envelopes.
- Two or more pieces of mail that are tied or fastened together in any parameter.

 **Note to Facilitator:** Show future Associates an example of an unacceptable Registered Mail package.

Sealing of Registered Mail

Do not assist the customer in the preparation or sealing of mail to be registered.

Only tape which will damage the envelope or wrapper when the tape is removed, and will absorb an ink postmark may be used on Registered Mail. Use of transparent tape, masking tape, nylon fiber tape or other similar types is prohibited anywhere on the outside of the package.

Round-date letter size envelopes twice on the back of the envelope at the crossing of the upper and lower flaps. If Return Receipt is used, Round-date partially on the receipt and partially on the envelope flaps. If the Return Receipt covers the entire back of the envelope, Round-date the perforation on both ends of the Return Receipt.

Round-date packages and flats sealed with paper tape across opposite edges of the strips. Round-date all seams on the wrapping if paper tape is not used.

 **Note to Facilitator:** Demonstrate correct procedure of postmarking a letter and package.

Labels for Registered Mail

All Registered Mail must have label 200 which is a preprinted, self adhesive label with a number series of nine digits preceded by the letter "R". These labels come in rolls and are kept behind the counter/IRT or POS ONE area.

Explain that the Label 200 is placed above the address and to the right of the return address on domestic articles. With International Postal Union mail, Label 200 is attached to the lower left corner of the address side of the item (IMM).



Note to Facilitator: Give future Associates Label 200 and ask them to place on a domestic letter.

Security for Registered Mail

Keep registered articles locked in a drawer or cabinet if you do not have a separate registry cage, until the Registered Mail articles are ready to be dispatched.

It is extremely important for you to follow the accountability and security procedures and to keep accurate records. Registered Mail must always be handled so that individual responsibility can be traced.

PS Form 3806, Receipt for Registered Mail

Registered Mail incorporates a system of receipts to monitor the mail's movement from the point of acceptance to delivery. The first copy of the PS Form 3806 is completed by the customer and the Sales and Services Associate; the top copy is the customer's receipt.

Exercise



Note to Facilitator: Role-play by selecting one future Associate to act the part of the customer, and another to be a Sales and Services Associate. A customer, Maya, wants to mail a Domestic Registered Article to Denver, weighing 8 oz. , containing jewelry to her grandmother. Have the Sales and Services Associate complete the transaction, (ensure that the GIST principles have been demonstrated), pay particular attention to the acceptance procedures and form completeness.

Declaration of Value


Postal insurance is provided for articles valued at a minimum of \$0.01, up to a maximum insured value of \$25,000, and is included in the fee. In addition, there is a handling fee for every \$1,000 over the first \$25,000 or fraction thereof on values up to 1,000,000. Articles valued at higher amounts must be charged the handling fee listed on the registry fee chart.


The sender must tell you (or enter on the firm mailing bill) the full value of the article and the value is determined by the customer, not you. Bonds, deeds, stock certificates, checks, currency, gems, business records, merchandise, jewelry, precious metals and a variety of personal items are sent by Registered Mail.


You should not quote or suggest replacement costs to a customer.

PS Form 3877, Firm Mailing Book

This form is used by mailers who average three or more Registered Mail pieces per mailing. The information is basically the same as PS Form 3806.


 **Note to Facilitator:** Explain firm mailers are supplied the Label 200 and PS Form 3877, Firm Mailing Book. The mailer affixes Label 200 to articles when preparing PS Form 3877.

 **Note to Facilitator:** Give future Associates a completed PS Form 3877 showing 6 registered items.

 **Note to Facilitator:** Place Exhibit 29 (PS Form 3877) on the overhead projector. The following points need to be mentioned regarding the overhead:

- Mailers return address is written only once.
- Only one Form is used for up to 15 Registered Mail articles.
- A PS Form 3877 is completed in duplicate or triplicate (see local policy).
- Round-date all copies.
- Copy of PS Form 3877 must be retained in the originating Post Office.


Exercises

 **Note to Facilitator:** Solicit responses from the group of future Associates.


1. All registered articles must be declared at:
 - A. Market value
 - B. No value or replacement cost
 - C. Full value**
 - D. None of the above
2. In order to be accepted for registration, mail matter must be paid at:
 - A. First-Class rate/Priority Mail**
 - B. Periodical rate
 - C. Standard mail
 - D. Any of the above
3. Domestic Mail is not accepted for registration if enclosed in:
 - A. Any container whose face is not at least 5" inches long and 3 ½ inches high.
 - B. Self-sealing or business reply envelope
 - C. Padded envelope
 - D. Any of the above**

4. The mailing receipt issued to customers mailing one registered article at a post office is:
 - A. PS Form 3896, receipt for registered article
 - B. PS Form 3806, receipt for Registered Mail**
 - C. PS Form 3877, Firm Mailing Book
 - D. PS Form 3824, temporary bulk receipt
5. Registered Mail letters should be postmarked:
 - A. Once on front
 - B. Once on front and once on back
 - C. Twice on back**
 - D. Once on back

Exercises:

 **Note to Facilitator:** Using Role-play **with retail equipment** select 5 groups of two future Associates, one to play the customer, the other the Sales and Services Associate. Role-play the following scenarios, one per group:

1. Customer wants to send an expensive piece of jewelry to daughter who is away at school.
2. Customer wishes to mail stock certificates to the company via Registered Mail. Customer asks the clerk to help him determine the value to claim.
3. Customer wants to mail a 6 oz. padded envelope Registered Mail to Montana.
4. Customer wants to mail some coins which he happens to mention that he purchased on sale for \$200. However, he wishes to insure for \$400.
5. Customer brings in paperwork in an tyvek envelope (4 oz.) and needs to send Registered Mail.
6. A customer comes in to the Post Office with a 2 oz. envelope. Customer requests Registered Mail with a value of \$250 to ZIP 90210.

 **Note to Facilitator:** Select one group that demonstrated correct sales techniques using GIST principles and repeat demonstration to class.

Module 13:

Image

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Module 13: Image

Terminal Objective:

Upon completion of this module, future Associates will be able to explain how image factors can affect customer perceptions and the Associates role in shaping those perceptions.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Explain the 21st century “Retail Mission” of the United States Postal Service.
- Understand customer perception factors.
- Understand competition consequences.

Time Allocated for this Module: One hour

Summary of Instructional Plan:

Facilitator will show videos and lead discussion on the future of the Postal Service and the Image we project.

Materials Required:

Instructor: Rip chart, colored markers, Videos: – “Bringing the Post Office to the People” and “Image”, overheads, handout ELM Part 930 – Uniform Program, POM 125.4 *Lobby Director Program* and VCR.

Future Associates: Workbook, pens or pencils, and colored markers

PRESENTATION



Note to Facilitator: *Discuss in your own words:*

The United States Postal Service is a business. All businesses face competition every day and must consistently meet the competitive challenge in order to succeed. This segment will introduce you to the competition faced by the Postal Service, how the Postal Service compares, and ways in which the Postal Service is working to better serve our customers.



Note to Facilitator: *Explain that the United States Postal Service is taking bold steps to meet the challenges of 21st century competition. This video highlights our “Retail Mission”. Show the video “Bringing the Post Office to the People”.*



Note to Facilitator: *Lead a discussion in your own words to communicate the following:*

The USPS is the only organization with across the board capabilities, serving every delivery and communication need. No other organization can fulfill this entire range of services. We are the only supplier that offers one-stop shopping for all delivery and communication needs. Most businesses, for example, can exist without UPS (United Parcel Service) or Federal Express, but virtually none can endure without the United States Postal Service.


It is also important to understand that our competitors are far from perfect. There is a perception among many Postal Service personnel that our overnight competitors operate in a virtually flawless manner, while there are plenty of “horror stories” about the USPS. In reality, our competitors all have their share of well-earned complaints from customers.


The USPS does everything the competition does and more. We are very good at what we do and the competition considers us a competitive challenge. By the end of training, future Associates will be knowledgeable about all USPS products and services and how to match these to our customers’ needs each and every time.

Talk about how the future Associates can affect whether or not a customer chooses to do business with the USPS or a competitor. It is all about customer perception. Think of yourself as a customer, what do you look for in choosing where to do business?

Influencing customer perception can be categorized in the following three P's:

- Personal: Your appearance and demeanor.
How do you look? How do you treat customers?
- Professional: Your Post Office.
Is it an inviting atmosphere?
- Postal: USPS Products and Services .
Do we offer what the customer needs?


 **Note to Facilitator:** Show the “Image” video to communicate the future Associates role in affecting the personal aspect of customers perceptions.

 **Note to Facilitator:** After video, lead a discussion to reinforce the following personal points:

Personal Appearance:

If you appear professional, well groomed, and in uniform, you show that you have pride in yourself and your job. A neat, professional appearance will have a positive impact on customer perceptions in a few seconds, as soon as they walk in the door. The Postal Service has a Uniform Program to ensure we look professional.


- Handout a copy of the Employee Labor Relations Manual (ELM), Part 930, to introduce the Uniform Program.
- Discuss elements of proper attire for Sales and Services Associates.
- Explain the Uniform Allowance Program
- Review any local procedures on Sales and Services Associates uniforms.
- Provide future Associates a list of vendors and procedures for obtaining uniforms.

 **Note to Facilitator:** Tell future Associates the following discussion refers to the professional element of a customer's perception:


Retail Lobby Appearance:

Customers are affected not only by the appearance of the Sales and Services Associates, but also by their total surroundings. When a customer walks into a post office, the appearance of the Retail Lobby has an immediate effect on them. And just like personal appearance, the appearance of the work environment can have an effect on employee morale.

- Explain how posters and merchandise should be displayed. The future Associate can help create an attractive and thus professional environment the Retail Lobby.
- Emphasize that part of that professional environment is their work area. A clean and uncluttered environment is always more appealing to a customer. It is a visual indication that the USPS is organized and orderly in all aspects of servicing their needs.
- Finally, using the Postal Operations Manual, Section 125.4, discuss lobby awareness programs such as the "Lobby Director Program" that are designed to improve customer service and thus affect their perception on our professionalism.

 **Note to Facilitator:** Inform future Associates the following discussion refers to the Postal (Products and Services) element of a customers perception:

Unless customers are confident in the products and services offered by the USPS, they will turn to our competitors. Most of you are probably aware that the USPS faces direct competition in the overnight delivery and parcel post markets. But even mail classes protected by the Private Express Statutes may face indirect competition, and new technologies threaten to take more and more business away from the Postal Service.

 **Note to Facilitator:** Using overhead Exhibit #28, (USPS vs. Competition) discuss the products and services that competitive businesses offer to counter those that USPS offers. Talking points include:

Competitive to:

- Standard Mail – Alternative networks (for newspapers and magazines, home shopping, newspaper inserts, telemarketing, TV commercials, newspaper/magazine ads) for advertising mail.
- First Class Mail – Despite the USPS monopoly on delivery of First Class letter mail, rapidly developing technology (i.e. email, fax, etc.) poses a competitive threat. The USPS now delivers only 65% of this material.
- Retail – Pack-and-Send retailers are now established as a highly credible alternative to post offices. This is a traditional \$2 billion industry serving much of the traditional USPS market

USPS competitive strengths:

- Express Mail – Expedited overnight delivery at the lowest published rates is competitive even against volume discounts.
- Priority Mail – “When overnight is overkill” features our expedited 2 or 3 day delivery at far lower costs than all competitors, including volume discounts.
- Parcel Post – Often far lower rates than those of UPS, with consistent savings in shipments less than 10 pounds, through Zone 5.



Note to Facilitator: *In your own words, summarize:*

The most important way for you to positively impact customer perceptions of the Postal Service is to provide excellent customer service with every single transaction. Customer expectations will rise continually as competition increases and technology evolves. As Sales and Services Associates, your commitment and customer service must EXCEED customer expectations. People take for granted the nearly 160 billion pieces of mail that the Postal Service delivers each year, and remember only what directly affects them. A successful retail transaction can have more to do with creating a good impression than anything else we do.

As Sales and Services Associates, YOU are the vital role in delivering customer service to every customer each and every time they visit a post office. And remember the most important aspect of meeting our competitive challenge is ensuring that our customers –the American public – have positive perceptions of the United States Postal Service.

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Module 14:

Insured Mail

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Module 14: Insured Mail

Terminal Objective:

Upon completion of this module future Associates will be able to sell, accept, and process Domestic and International Insured Mail Services.

Enabling Objectives:

At the completion future Associates will be able to:

- Identify features and customer benefits of Numbered and Unnumbered Insured Mail Services.
- Describe Insured Mail Receipts.
- Describe Processing of Insured Mailings using a Firm Mailing Book.
- Describe Insured Mail forms, record keeping and holding period.
- Describe Uninsured Mail.

Time allocated for module: 45 minutes

Instructional methods: Presentation, Discussion, Demonstration, Question/Answer and Exercises.

Summary of instructional plan:

The instructor introduces the module, reviews the objectives, and lectures on the purpose, features, and customer benefits of insured mail service. This lecture also includes the policies and procedures governing indemnity coverage.

Students will complete the exercises at the end of the module.


Materials required:

Instructor: Rip chart, markers, pen and pencils, PS Forms 3813, 3813P, 3849, and 3877.

Future Associates: workbook, pen and pencils


PRESENTATION

Introduction

 **Note to Facilitator:** Explain that Insured Mail Service provides indemnity coverage for an item if it is lost, rifled, or damaged while in the custody of the United States Postal Service.


You must know the features and benefits of Insured Mail Service in order to provide effective service. Insurance is available for merchandise mailed at the First-Class, Priority, and Package Service rates. There are two types of Insured Mail Services:

- Unnumbered Insured: Value .01 cent up to \$50, no signature required.
- Numbered Insured: Value from \$50.01 to \$5,000, signature required. (Signature is required for all International Insured Mail pieces, regardless of value.)
- Refer to ICLs of the International Mail Manual concerning the availability of postal insurance.


 **Note to Facilitator:** Explain that Insured Mail Service fees are in addition to the postage fees, and are for merchandise only.

For each Insured Mail item, the mailer is issued a receipt on one of the following forms:

- PS Form 3813, Receipt for Domestic Insured Parcel, for items insured for \$50 or less. These items are stamped on the address side with an elliptical stamp endorsing it as insured.
- PS Form 3813P, Receipt for Insured Mail Domestic/International, for items insured for more than \$50.

 **Note to Facilitator:** Show future Associates the endorsement stamp (elliptical).

Insured Mail Forms

 **Note to Facilitator:** Discuss PS Forms 3813 and 3813P. Show the future Associates how to complete the forms. Give forms to the future Associates to study and complete.

All insured items that are sent internationally must have a form 3813P numbered insured receipt.

Firm mailings

A copy of PS Form 3877 is the mailer's receipt. Items insured for \$50 or less are not to be numbered and should be listed on separate PS Form 3877s or grouped together. Items to be insured for more than \$50 must use postal provided labels or privately printed facsimiles that have been approved by the Postal Business Center. The mailer enters the names, addressed, and Insured Number on PS Form 3877. The Sales and Services Associate is required to verify the correctness of the information and Round-Date all copies.

Draw diagonal line through unused portions of PS Form 3877. Any alterations must be initialed by Sales and Services Associate and the mailer.

Record Keeping of Insured Mail

Advise customer USPS does not keep a record at the office of mailing. Mailer must show original receipt if a claim is filed for loss or damage (also for an international inquiry).


The Sales and Services Associate should recommend registered mail for customers who are mailing money and irreplaceable items, regardless of value, as it provides greater security.

Holding Period of Insured Mail


- 15 days (unless less time initialed by mailer).
- second/final notice (PS Form 3849) issued after five (5) calendar days from first delivery attempt
- return entire mail piece to sender if not claimed within fifteen (15) days from first delivery attempt.

Uninsurable mail

Items not adequately packaged to withstand normal handling in the mail.

 **Note to Facilitator:** The facilitator will have future Associates look up the uninsurable mail portion in the DMM.

Role-Play Exercises

 **Note to Facilitator:** Have future Associates pair off and complete the following exercises on Insured Mail using GIST.

1. Dave presents a 5-lb Priority Mail piece addressed to Marco Island, FL 34145-1234 and wants it insured for \$85.00. Compute postage fees using IRT/POS ONE and complete the required forms.
2. Patty Bee is mailing a 5-lb Priority Mail package to Chester, MT 59522-1234 and wants \$250 insurance. Compute postage and fees using IRT/POS ONE and complete the required forms.
3. Hank walks up to your counter; he is mailing a 12-oz. item to Morton IL 61550-1234. Hank wants Priority Mail Service and Postal Insurance for \$49. Compute the postage and fees using an IRT/POS ONE and complete the required forms.
4. Charles hands you a 1-oz. letter and wants it insured for \$1000 because it contains stocks. Compute the postage and fees using an IRT/POS ONE and complete the required forms.

 **Note to Facilitator:** Must be sent by Registered Mail.

5. Jennifer wants her 2-lb. package insured. It contains a \$60 sweater and wants to send it to Tribes Hill, NY 12177-1234. Compute the postage and fees using an IRT/POS ONE and complete the required forms.

Module 15:

Collect on Delivery (COD) Mail

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Module 15: Collect on Delivery (COD) Mail

Terminal Objective:

Upon completion of this module, future Associates will be able to sell, accept, and process COD Mail Services.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Explain the purposes of COD Mail Service.
- Identify the types of COD Mail Service.
- Identify the classes of COD Mail Service.
- Explain the marketing features and customer benefits COD Mail Service.
- Explain COD acceptance procedures.
- Demonstrate the proper completion of PS Form 3816.

Time allocated for this module: 1 Hr.

Instructional Methods: Discussion, Presentation, Question and Answer and Mock Lobby.

Summary of Instructional Plan:

The instructor introduces the module by summarizing the topics to be covered. The instructor discusses and describes COD Mail Service, then shows future Associates how to complete the forms. The instructor describes the acceptance procedures that includes the preparation requirements for mailers.

Materials Required:

Instructor: Rip chart, colored markers, PS Form 3816

Future Associates: Workbook, pens or pencils, and colored markers

PRESENTATION

The USPS provides COD or “Collect On Delivery” mail service for customers who wish to mail articles for which they have not been paid. The addressee pays the amount the mailer indicates as due, when the article is delivered.

Types of COD Mail Service.

There are 3 types of COD Mail Service:

- Only merchandise cost returned to the sender.
- Only postage and fees returned to the sender.
- Only merchandise cost and postage and fees returned to the sender.

COD Mail is available with the following classes of mail:

- Express Mail
- First Class/Priority Mail
- Package Services



Note to Facilitator: Explain the marketing features and customer benefits of COD Mail Service.

The addressee/recipient has the option of remitting the amount due the sender either by cash or by check. If payment is made by check, the check is made payable to the mailer and the USPS forwards the check to the mailer. If payment is made by cash, a postal money order is sent to the mailer. COD funds should be sent to the mailer the following business day.

The fees for COD service include insurance against:

- Loss
- Damage to the article

The fees for COD service include LIMITED insurance against:

- Failure to receive a postal money order if payment has been made by cash.
- The recipients check if payment has been made by check.



Note to Facilitator: Explain COD Acceptance Procedures.

COD is a service for domestic mail only. The regular mail fees apply plus the collection charge specified for COD.

Requirements for COD Mail Service. When selling or accepting COD items you must ensure that the:

- Mail has the complete names and addresses of the sender and addressee.
- Amount to be collected from the addressee must not exceed \$1000.00. Do not accept CODs marked for cash only.
- Amount to be collected or the amount of insurance coverage desired, whichever is higher, determines the COD fee.
- Sender guarantees to pay any return postage, unless otherwise specified.
- Goods shipped must have been ordered by the addressee.

Customer may not use COD Service for:

- Collection Agency purposes.
- Return of merchandise about which some dissatisfaction has arisen, unless the new addressee has consented.
- Sending only bills or statements of indebtedness.
- Parcels containing moving picture films mailed by exhibitors to moving picture manufacturers, distributors, or exchanges. Such parcels may be sent as Insured Mail or if sealed, by Registered/First Class Mail.

COD Fees


The customer who is mailing a COD articles pays the postage charge, plus the COD fee. In addition, the customer may pay fees for Special Handling. These fees are called mailing fees. The money that the postal service collects from the addressee is called the amount due sender.

The amount due sender is determined by the sender and usually covers the cost of the article being mailed. The customer may also include all or part of the mailing fees.


The addressee has the option of paying by check payable to the mailer, or by cash. If the customer pays by cash, the Money Order fee will be collected.

Except for registered COD articles, every article accepted for COD mailing is insured as part of the COD service. There is no extra fee for insurance. The COD fee is based on the amount of money due the sender, or the amount of insurance the sender desires. Whichever is higher.

Demonstrate proper completion of PS Form 3816.

 **Note to Facilitator:** *Instructor will demonstrate the PS Form 3816, block by block. The COD Number is on the PS Form 3816. This number must be changed when used in conjunction with Express Mail or Registered Mail. The new number will be the Express or Registered Mail number.*

COD Exercise

 **Note to Facilitator:** Using the proper Rate Charts determine the Fee that a mailer would pay, and also what the COD and Money Order charges the addressee would pay.

1. Larry Baumiller comes to your retail counter and wishes to mail a parcel that weighs 15lbs. 6ozs. to ZIP code 33155 at a Priority Mail rate. He wants to send the parcel COD and receive back the \$210.00 for the merchandise only.

Postage and Fees _____ Collection Amount _____

2. Donna Gill would like to mail a 4lb. Parcel, Priority Mail to ZIP code 90033. She states that the addressee owes her \$55. She wants a Return Receipt, and she wishes to collect the \$55 plus the postage and fees from the addressee.

Postage and Fees _____ Collection Amount _____

3. A jeweler, Larry Stanfield, across the street from your office comes to your retail counter with a 13oz. small box and wants to Register the box with Postal Insurance for the value of \$300. He wishes the customer to pay for this along with the value of the merchandise. The parcel is addressed to Stanwood, WA 98292.

Postage and Fees _____ Collection Amount _____

4. Dennis Kelly wants to mail an Express Mail that weighs 1lb. 6ozs. to Naples, FL 34102, and wants the customer to pay for the postage and fees. He also wants a Return Receipt.

Postage and Fees _____ Collection Amount _____

5. Joe Lujan wants to mail a car bumper that is 40" in length and weighs 32lbs. going to ZIP code 99723 Parcel Post. He wants to mail it COD for the value of the bumper which is \$240 plus the postage and fees, to be collected from the addressee.

Postage and Fees _____ Collection Amount _____

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Module 16:

PO Box Service

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Module 16: PO Box Service

Terminal Objective:

Upon completion of this module, future Associates will be able to issue and process Post Office Box Service.

Enabling Objectives:

- Discuss the features and benefits of Post Office Box Service.
- Explain the procedures for obtaining Post Office Box Service.
- Describe the fee payment periods for Post Office Box Service.
- Identify the forms for Post Office Box Service.
- Discuss the features and benefits of Caller Service.
- Discuss the features and benefits of General Delivery.

Time Allocated for this Module: 1Hr.

Instructional Methods: Presentation, Demonstration, Hands-On, Discussion, Workbook Reading

Summary of Instructional Plan:

The facilitator describes and demonstrates the processes to issue and maintain Post Office Box Service. Future Associates will show how to process a post office box using equipment and how to account for all records that apply to post office box service.

Materials Required:

Instructor: Rip Chart, PS Form 1093, 3544, 1538 and 1094 and assorted colored markers, overheads.

Future Associates: Workbook, pens or pencils, and assorted colored markers.

PRESENTATION

Features and Benefits

This service is provided as a convenience for customers who might wish to pick up their mail at the post office for security purposes or to make the mail available to them prior to being delivered by the carrier or at their own convenience during the hours the lobby is open.

Customers may open these boxes by keys or combination locks. Keys to post office boxes are only available through the post office for a fee. This fee for up to two keys is refundable when the box is surrendered. Broken keys are replaced without charge if the damaged key is returned. Locks and combinations are changed each time a box is closed.

A number is assigned to each box.

There are five different box sizes, however, all sizes may not be available at every facility. Customers rent a post office box of a certain size according to their needs.



Note to Facilitator: Provide each future Associate PS Form 1093.

Obtaining a Post Office Box

Procedures for obtaining Post Office Box Service. PS Form 1093 is used to obtain a post office box. Customers must complete all appropriate entries on the form and return it to any post office that provides window services to the public, even if it is not the post office where the customer wishes to acquire the box. If parents or guardians do not object in writing, minors may obtain Post Office Box Service.

Anyone who is to receive mail in the assigned box should have his/her name listed on the PS form 1093.

When you accept an application for post office box service, you must first perform your local verification procedures:

- If you know the applicant who is submitting PS Form 1093, then you can verify the form.

- If you do not know the person, then you must obtain two forms of valid identification, one being a photo ID, with PS Form 1093. Social security cards are not acceptable as identification. The applicant must present one of the following photo IDs:
 - Drivers license
 - Military, government, or an established corporate identification card
 - Passport

In addition to the Photo ID, the Applicant must show positive proof that they are the bonafide occupant. Current utility bill in their name, lease, etc.

An application will be considered verified if there are not discrepancies between the information on PS Form 1093 and the identification presented.

The address shown on the PS Form 1093 must be verified within three workdays. The applicants must reside or conduct business at the address shown.

If the information on the form does not match that on the identification, further verification procedures must be conducted which will substantiate that the applicant resides or conducts business at the address shown. This verification should be completed within 3 work days.


PO Box Fees

A post office box should be assigned immediately upon approval of the application and payment of the required fees.



Note to Facilitator: See Exhibit 29 titled (Box Rental Due Date Chart)

Refer to “Box Rental Due Date Chart”. Payment may be made for any 6 or 12 consecutive months. Always refer to the Box Rental Due Date Chart. Customers may transfer post office service to a different facility within the same city without paying additional fees when transferring to a box of the same size. The customer must submit a new PS Form 1093 where the post office service is desired. When a box is closed or surrendered the unused portion in 3 month blocks of the fee may be refunded.

 **Note to Facilitator:** Provide each future Associate PS Form 1538 to discuss and review.

Caller Service

Caller Service is a premium service for people and companies that need more pickup times than Firm Caller and/or have more mail than the largest box in your office will hold daily. The fees for Caller Service are based upon a minimum of 6 months. If Caller Service is paid for a current wall box, both caller and box fee must be paid. If any company or individual has currently 5 wallboxes and needs another separation, there must be phantom or caller number fee.

Box Keys are provided to boxholders for a fee. When keys are returned and the box is closed, key deposits are refunded to a maximum of dollar amount for two keys regardless of # of keys issued. No keys are provided with Caller Service. Key fees are entered in AIC 126 or GLA 0126 and a PS Form 3544 receipt is given to customer.

General Delivery

General Delivery is available at post offices for transients and people waiting to get P.O. Boxes.

To get mail held in General Delivery, a Sales and Services Associate must verify the customer's ID. General Delivery is held for 30 days unless the Postmaster extends holding period.

Exercises

1. Process an initial Post Office Box fee payment on the retail equipment.

 **Note to Facilitator:** Use local group and size of your choice.

2. Void a PS Form 3544 from a PO Box key deposit. Or process a refund of a PO Box key on Retail equipment.
3. Which of the following is a necessary PS Form to rent a PO Box?
 - PS Form 3811
 - PS Form 3544
 - PS Form 1093
 - All of the above

Box Rental Due Date Chart

IF RENTED DURING PERIOD FROM-TO	SIX MONTHS DUE DATE	TWELVE MONTHS DUE DATE
JAN 1 THRU 15	JUN 30	DEC 31
JAN 16 THRU 31	JUL 31	JAN 31
FEB 1 THRU 15	JUL 31	JAN 31
FEB 16 THRU 28	AUG 31	FEB 28
MAR 1 THRU 15	AUG 31	FEB 28
MAR 16 THRU 31	SEP 30	MAR 31
APR 1 THRU 15	SEP 30	MAR 31
APR 16 THRU 30	OCT 30	APR 30
MAY 1 THRU 15	OCT 31	APR 30
MAY 16 THRU 31	NOV 30	MAY 31
JUNE 1 THRU 15	NOV 30	MAY 31
JUN 16 THRU 30	DEC 31	JUN 30
JUL 1 THRU 15	DEC 31	JUN 30
JUL 16 THRU 31	JAN 31	JUL 31
AUG 1 THRU 15	JAN 31	JUL 31
AUG 16 THRU 31	FEB 28	AUG 31
SEP 1 THRU 15	FEB 28	AUG 31
SEP 16 THRU 30	MAR 31	SEP 30
OCT 1 THRU 15	MAR 31	SEP 30
OCT 16 THRU 31	APR 30	OCT 31
NOV 1 THRU 15	APR 30	OCT 31
NOV 16 THRU 30	MAY 31	NOV 30
DEC 1 THRU 15	MAY 31	NOV 30
DEC 16 THRU 31	JUN 30	DEC 31

REFUNDS (GROUP ONE AND TWO OFFICES ONLY)
 DISCONTINUED SERVICE ANY TIME WITHIN THE FIRST
 THREE MONTHS 1/2 SEMI-ANNUAL RATE NO REFUND
 WILL BE MADE AFTER THE 1ST DAY OF THE FOURTH MONTH

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Module 17:

Money Orders

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Module 17: Money Orders

Terminal Objective:

Upon completion of this module, future Associates will be able to issue, cash, and account for Money Orders.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Identify and describe the features and benefits of Money Orders
- Describe the types of Money Orders
- Define the components of the Bank Secrecy Act
- Demonstrate the imprinting procedures of a Money Order (POS ONE if applicable)
- Explain the procedures for inquiry of a lost or stolen Money Order
- Explain the procedures for cashing a Money Order
- Explain the Bait Money Order Program

Time Allocated for this Module: 1 hr. and 45 minutes

Instructional Methods: Lecture, Demonstration, Question/Answer, Role Play, and Mock Lobby (simulation).

Summary of Instruction Plan:

The instructor discusses the procedures for issuing, cashing, and accounting for Money Orders. The future Associates use the Money Order equipment to issue a Money Order. The future Associate will use the equipment to cash, and account for mock Money Orders. The hands-on experience is in the simulated environment (mock lobby).

Materials Required:

Instructor: Rip Chart, colored markers, video Bank Secrecy Act, PS Forms 8105-A, 8105-B, 6401, DMM, IMM, and Publication 348

Future Associates: Workbook, pens or pencils, colored markers and Publication 348.


PRESENTATION

Features and Benefits of Money Orders


- A safe way to send money through the mail
- Money Orders can be bought for domestic or international use
- A copy is retained by the USPS for 2 years
- Replacements are available (for a fee)

Types of Money Orders

Postal service issues 3 types of Money Orders.


 **Note to Facilitator:** Discuss each type of Money Order using a sample of each type

- Domestic service-the 50 contiguous locations including U.S. territories and possessions, and for domestic customers to send funds to APO/FPO addresses, and to U.S. embassies in foreign countries. Currently the maximum amount for a domestic Money Order is \$700.00 with a fee for each Money Order.
- Direct Service: (United States International Money Order) International service Money Order for countries that accept the pink MP-1. The maximum amount for an International Money Order is determined by each country (refer to the IMM). This service is available to transfer funds to individuals or firms in countries that have entered into agreements with the USPS for the exchange of postal Money Orders.
- Standard International Service:(Authorization to issue an international Money Order) This service is for countries that do not accept the MP-1 (refer to the IMM)


 **Note to Facilitator:** Distribute PS Forms 8105-A and 8105-B. Discuss both of these forms with future Associates.

Discuss No Fee Money Orders.

MONEY ORDER IMPRINT PROCEDURES

 **Note to Facilitator:** Demonstrate the process to imprint a Money Order. Have EACH future Associate demonstrate this process. Use POS ONE if applicable.

INQUIRY OF A LOST OR STOLEN MONEY ORDER

 **Note to Facilitator:** Show future Associates an example of the PS Form 6401 and PS Form 6684.


There is one form to use for an inquiry of a lost or stolen Money Order:

- PS Form 6401: Money Order Inquiry

The PS Form 6401 is the form to use for an inquiry regarding a Domestic Money Order (United States Postal Money Order). This form is also used for the Direct Service (United States International Money Order) in countries where this service is permitted. If the customer needs a replacement Money Order or proof that a Money Order was cashed, including a photocopy, they should use this form. There is a fee to use this form (see current rate chart). The customer should complete the form and return it to the Sales and Services Associate for processing.

The PS Form 6684 is used to inquire about Money Orders in countries where the Standard International Service is used.


PROCEDURES FOR CASHING MONEY ORDERS

 **NOTE TO FACILITATOR:** Utilize the Postal Bulletin and the IMM while discussing the cashing of Money Orders.

Customers can cash Domestic and **authorized** International Money Orders at post offices. Domestic Money Orders do not have an expiration date. To cash a Domestic Money Order, check the missing/stolen Money Order list from the current postal bulletin. If the Money Order is not on the list then you should do the following:

- Look for the water mark (when held to the light, you should see a faint image of Benjamin Franklin)
- Check for any other irregularities (attempts to change the value, etc)
- Endorse the Money Order on the back in the same manner as you would a check (get proper identification such as drivers license, passport, etc)

Bank Secrecy Act

 **Note to Facilitator:** Prior to showing the Bank Secrecy Act video, inform future Associates to pay particular attention to the key points.

SHOW VIDEO

Money Orders are accountable items. You are responsible for these items because of their potential value and you are required to sign for them.

 **Note to Facilitator:** Discuss the key points of the video

The U.S. Treasury Department has defined money laundering as the attempt to conceal or disguise the nature, location, source, ownership, or control of money derived from illegal activities. This definition covers a wide range of activity and includes any type of money, including postal Money Orders. In fact, law enforcement officials have seen instances where postal Money Orders are used to launder large sums of money derived from illegal drugs and other criminal activities.

The bank secrecy act requires any persons purchasing \$3000.00 or more (but less than \$10,000) of Money Orders in any one day **must fill out a PS Form 8105-A** before purchasing the Money Orders. When a customer requests to purchase Money Orders totaling \$3000.00 or more (but less than \$10,000.00) in any one day and is asked to fill out a PS Form 8501-A but refuses to fill the form out and acts in a suspicious manner the clerk **should fill out a PS Form 8105B**. This form is to be filled out at the discretion of the clerk.

Postal Money Orders must be paid by cash, debit card, travelers check, or Postal Money Orders**only**.

Postal service rules state that employees cannot sell (even with PS Form 8105a filled out) or cash Money Orders totaling \$10,000.00 or more in any one day to/for the same person.


BAIT MONEY ORDER PROGRAM

Bait Money Orders are used to aid the Postal Inspection Service in postal burglary and robbery investigations. Once a Bait Money Order is cashed and recovered, numerous investigative leads can be pursued which may identify and lead to prompt apprehension of the suspect.

Each Sales and Services Associate will receive three Bait Money Orders assigned with their fixed credits. These Bait Money Orders are accountable. Place and store the Bait

Money Orders under the largest currency denomination compartment in your till drawer.

ROLE PLAY EXERCISES

 **Note to Facilitator:** Observe that the following criteria are met with each of the following scenarios:

- Are principles of GIST being used during the transaction?
- Is transaction processed correctly on retail equipment?
- Is the IMM used to correctly identify what type of Money Order is allowed in a particular country?
- Is Money Order endorsed properly if it is being cashed?
- Has the Postal Bulletin been checked for the lost or stolen list if being cashed?
- Is identification being asked for and written down if being cashed?
- Is PS Form 8105-A being used?
- Is PS Form 8105-B being used?

SCENARIO #1

Jim Hanrahan (customer) asks the Sales and Services Associate how to send money to Mexico.

SCENARIO #2

Becky Belmont (customer) requests Money Orders that total \$3500.00.

SCENARIO #3

David Wilhelm (customer) comes in and asks for a Money Order for \$1000.00.

SCENARIO #4

Joe Whalen (customer) wishes to purchase an International Money Order to send to Cuba.

SCENARIO #5

Divanne Pittman (customer) comes to clerk with a \$500.00 postal Money Order to cash.

SCENARIO #6

Beverly Rimmer (customer) asks to purchase Money Orders that total \$4000.00.

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Day Three Review

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Day Three Review

Terminal Objective:

Upon completion of this module, future Associates will be able to explain the days lessons.

Enabling Objective:

Upon completion of this module, future Associates will be able to demonstrate the objectives of the modules presented the second day through questions and answers.

Time Allocated for this Module: 45 Minutes

Instructional Methods: Postal Jeopardy Game


Summary of Instructions Plan:

Facilitator will explain the rules of the game.

Materials Required:

Instructor: Rip Chart or Whiteboard and Post-It Notes

Future Associates: No materials required

 **Note to Facilitators:** Conduct review in the format of the game show “Jeopardy”.

- Develop a Jeopardy game board using rip chart or white board and post-it notes. You will need six horizontal columns and six vertical columns.
- The headers (or categories) of the six columns are:
Image
Insured Mail
Collect on Delivery (COD) Mail
Express Mail
PO Box Service
Money Orders
- Write five answers under each category and cover each with a post-it note. (Total is 30 answers and post-it notes.) Label post-it note (i.e. \$10,\$20,\$30, \$40, \$50)
- Divide class into two teams. Let team spokesperson request their category/ dollar amount. (i.e. I’ll take Insured Mail for \$20!)
- The following answers may be used or you can make up your own:

Image:

\$10 – Personal, Professional, & Postal

(Answer - Question is What are the three P’s of Influencing Customer Perception?)

\$20 – 2 or 3 day delivery at far lower costs than all competitors

(Answer – Question is What is Priority Mail?)

\$30 – “Bringing the Post Office to the People”

(Answer – Question is What is the USPS Retail Mission?)

\$40 – Name a lobby awareness program designed to improve customer service

(Answer – Question is What is the Lobby Director Program?)

\$50 – Excellent Service - every customer, every day, every time

(Answer – Question is What do we want to provide our customers?)

Insured:

\$10 – Number insured and unnumbered insured

(Answer – Question is What are two types of Insured Mail Service?)

\$20 – The insured value of less than \$50

(Answer – Question is What is Unnumbered Insured Mail?)

\$30 – Normally 15 days unless otherwise indicated

(Answer – Question is What is the holding period for insured Mail?)

\$40 – Receipt (color or number) for insured domestic or international Insured parcel

(Answer – Question is What is the PS 3813P or the blue form?)

\$50 – No signature required on Insured Mail Service

(Answer – Question is What is Unnumbered Insured Mail?)

COD:

\$10 – Maximum collection limit of COD Service

(Answer – Question is What is \$1000?)

\$20 – Express, First Class, and Package Services

(Answer – Question is What are the threeailable classes of COD?)

\$30 – Sending bills or statements of indebtedness

(Answer – Question is What cannot be mailed COD?)

\$40 – Responsible for return postage charges unless otherwise indicated

(Answer – Question is Who is the Sender?)

\$50 – Purpose of .75 fee provided from the recipient

(Answer – Question is What is purchase of a money order?)

PO Box Service:

\$10 – Quantity of box sizes

(Answer – Question is What are 5?)

\$20 – Available at post offices for transients and people waiting to get PO Boxes

(Answer – Question is What is General Delivery?)

\$30 – Rate charged for box key

(Answer – Question is What is \$1?)

\$40 – Drivers license, Military/Government Identification, Passport, Photo Credit Card

(Answer – Question is What are acceptable forms identification to rent a PO Box?)

\$50 – Premium service for people and companies that need more pickup times

(Answer – Question is What is Caller Service)

Money Orders:

\$10 – The safest way to send money through the mail

(Answer – Question is a Money Order?)

\$20 – Maximum amount for a domestic money order

(Answer – Question is What is \$700?)

\$30 – The only three acceptable payment types for postal money orders

(Answer – Question is What are Cash, Debit, or Travelers Checks?)

\$40 – Two types of International Money Orders

(Answer – Question is What are Direct Service and Standard International Service?)

\$50 - The dollar amount and PS Form number required for the Bank Secrecy Act

(Answer – Question is What is \$3000 and PS Form 8105A?)

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Day Four

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Module 18:

Postal Products

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Module 18: Postal Products

Terminal Objective:

Upon completion of this module future Associates will be able to identify and explain retail products and services.

Enabling Objectives:

Upon the completion of this module future Associates will be able to:

- Identify retail products and services
- Explain PC Postage

Time Allocated for this Module: 1 Hr.

Instructional Methods: Presentation, Discussion, Mock Lobby (simulation), and Demonstration.

Summary of Instructional Plan:


Facilitator introduces the module by giving a brief description of the products and services offered by the United States Postal Service.

Materials Required:


Instructor: Rip Chart, colored markers, and Handbook 130 (per # of students)

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION

 **Note to Facilitator:** Identify the following retail products and services using the HBK PO 130.

- Retail Merchandise offered by the Postal Service includes stationery, key chains, caps, ties, pens, jewelry, video tapes, etc.
- Packaging Products offered by the Postal Service are padded envelopes, mailing envelopes, tape, bubble wrap, various size boxes, stamp dispensers, etc.
- Phone Cards are available at designated post offices and offered in denominations from \$10.00 to \$100.00. FACILITATOR: SHOW EXAMPLES, IF AVAILABLE

 **Note to Facilitator:** Demonstrate phone card activation procedures.

- Liberty Cash Cards are a prepaid payment method to purchase postal products and services.
- International Wire Transfer
 - A Dinero Seguro (Sure Money) is a service to transfer money from the USA to Mexico.
- Philately is the collecting and study of postage stamps and other postal materials. Examples of Philatelic Products are:
 - A. Commemorative Stamps: These are stamps that honor anniversaries, important people, or special events. These are usually sold for a certain amount of time.
 - B. Definitives: These are regular issues of stamps that are not commemoratives. These are usually sold over long periods of time.
 - C. Commemorative Mint Set
 - D. Postal Service Guide to US Stamps: This is a book that lists and describes the different kinds of available stamps.

PC Postage

PC Postage (personal computer postage) is the name used by the USPS for products that let customers purchase and print postage onto envelopes and labels using their personal computers and the Internet.

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Module 19:

Security and Sanctity of Mail

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Module 19: Security and Sanctity of Mail

Terminal Objective:

Upon completion of this module, the future Associates will be able to identify and describe the Sales and Service Associates' role in the security and sanctity of the mail.

Enabling Objectives:

Upon completion of this module, future Associates will be able to:

- Describe the Sales and Services Associates' role as part of the public trust vested in each postal employee.
- Describe unacceptable conduct involving security and sanctity of the mail.
- Describe the consequences of failing to uphold the security and sanctity of the mails.
- Identify the references for employee responsibilities with regard to security and sanctity of the mail.

Time allocated for module: 1 Hr.

Instructional methods: Presentation, Discussion, Question/Answer

Summary of instructional plan:

The instructor describes the public trust held by postal employees with particular emphasis on security and sanctity of the mails. **Note: a representative from the Postal Inspection Service may cover this module-consult local district policy.**


Materials required:

Instructor: rip chart, markers, pen and pencils

Future Associates: workbook, pen and pencils

PRESENTATION

1. The Postal Service must preserve and protect the security and sanctity of the mail in its custody from unauthorized opening, inspection, reading of contents or covers, tampering delay, or other unauthorized acts. This is a public trust vested in each postal employee. Mail that is accepted by any employee must be protected.
2. The following are examples of unacceptable conduct relating to security and sanctity of the mail:
 - **Theft** taking something that does not belong to you i.e., taking excess merchandise samples or undeliverable publications for personal use. Theft also includes removing merchandise, money, or coupons from undeliverable bulk business mail for personal use.
 - **Destruction or damage of mail** deliberately damaging or losing of mail i.e., discarding or defacing deliverable mail. Allowing the mail to remain unprotected from theft and/or inclement weather.
 - **Delay of mail** improperly detaining of mail i.e. failing to deliver in accordance with service standards prescribed for each class of mail.
 - **Safeguarding Stamp Stock** (Facilitator will lead discussion)
 - **No Comingling of Funds** (Facilitator will lead discussion)
 - **Securing IRT/POS** (Facilitator will lead discussion)
3. Failure to uphold the public trust vested in each postal employee may cause removal from the postal service as well as criminal prosecution resulting in fines and/or imprisonment.
4. References for employee responsibilities appear in various handbooks and manuals, with section 274 of the Administration Support Manual (ASM).

 **Note to Facilitator:** lead group discussion on Security and Sanctity of the Mail.

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Module 20:

Signature Confirmation

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Module 20: Signature Confirmation

Terminal Objective:

Upon completion of this module future Associates will be able to sell, accept, and process articles for Signature Confirmation.

Enabling Objective:

Upon the completion of this module future Associates will be able to:

- Define Signature Confirmation
- Explain what other special services can be combined with Signature Confirmation
- Explain how the Signature Confirmation system works.
- Demonstrate selling Signature Confirmation
- Explain revenue protection for Signature Confirmation
- Explain the refund process for Signature Confirmation
- Demonstrate accepting articles for Signature Confirmation
- Demonstrate processing articles for Signature Confirmation

Time Allocated: 45 min.

Instructional Method: Presentation, Discussion, Demonstration, and Role Play

Summary of Instructional Plan: Facilitator will explain the benefits and features of Signature Confirmation Facilitator will demonstrate the selling, accepting and processing articles for Signature Confirmation.

Materials Required:

Instructor: Rip Chart, Colored Markers, PS Form 153, Scanners, IRT/POS, Round Date

Future Associate: Workbook, pens and pencils

PRESENTATION

Define Signature Confirmation™ Service

Signature Confirmation is our newest "proof of delivery" service. Signature Confirmation is a special service that furnishes the recipient's printed name, a copy of their signature, as well as date, time and ZIP Code of delivery. The following are important facts you need to know about the retail option Signature Confirmation service.

Special Service

- Recipient's data entered name, date, time and ZIP Code of delivery are available by visiting the USPS website. '
- Date and time of delivery are available by calling a toll free number.
- An image of the signature, printed name and address is available, by request, using the toll free number or by visiting our website. The delivery and signature information will be faxed or mailed to the customer.
- Customers can Waive the Signature at the time of mailing. If the addressee or addressee's agent is not available to sign for the delivery, the delivery employee's signature constitutes valid proof of delivery if the item can be left in a secure location. Customer's using this option will not receive a copy of the delivery employee's signature image.
- Sold for use on Priority Mail and Package Services - (Parcel Post, Bound Printed Matter, Library Mail, and Media Mail).
- Signature Confirmation must be purchased at the time of mailing.
- Fee is charged in addition to postage.
- Available for domestic mail only.
- Customers have asked for this service for their high value mailings and fraud prevention.

Cost

- Review current ratefold for fees.

Easy-to-access delivery information

- Customers can call 1-800-222-1811 for delivery date and time.
- Customers can visit our website at www.usps.com for delivery date, time and ZIP Code information. The data entered recipient's name is also available.
- Delivery status is also available-delivered, attempted, forwarded, or returned to sender.

Easy-to-request signature information

- Customers can request an image of the recipient's signature with printed name and address information, which will be sent by fax or mail.

Special services that can be combined with Signature Confirmation when additional fees are paid

- Registry, Insurance (minimum or numbered), COD, and Special Handling.
- Restricted Delivery (if purchased with insurance for more than \$50, COD or Registry service).

NOTE: Return Receipt and Restricted Delivery cannot be combined with Signature Confirmation without the purchase of registry, numbered insured or COD.

Waiver of Signature is not available when Signature Confirmation is combined with other special services.

Certified Mail cannot be combined with Signature Confirmation.

Service not available

- Signature Confirmation service is not available for mail addressed to APO/FPO destinations or to United States territories, possessions, and freely-associated states listed in the DMM Section G01 1.2.0 (except for Puerto Rico and the U.S. Virgin Islands, where service is available).

Acceptance information at the retail window is captured with:

- A POS ONE terminal scanner.
- An IRT wand (Unisys III and MOS).
- A Delivery Confirmation handheld scanner in offices without POS ONE or IRT's

Delivery/name information is captured with:

- A POS ONE terminal.
- A Delivery Confirmation handheld scanner.
- I RT's **cannot** capture delivery/name information

Customers access signature and delivery Information

- Customers can call 1-800-222-1811 to check delivery status and request a copy of the delivery and signature information. (Data entered name is available on the website, not on the toll free number automated system).
- Customers can visit our website at www.usps.com.
- Customers can request an image of the signature and delivery information be faxed or mailed to them, when calling the toll free number or while on the USPS website. Customers will receive the information available including recipient's signature, printed name and street address on the USPS response letter.

Delivery of Signature Confirmation

POS ONE

Continue to use the Mail Pickup function on POS ONE (IBM and NCR) to capture information for Signature Confirmation items.

Delivery Confirmation handheld scanners

- Scan the barcode on the Signature Confirmation label The scanner will prompt you to:
- Have the customer complete the PS Form 3849 (signature, printed name and address)
 - Enter the first initial and last name (just like Express Mail)
 - Scan the PS Form 3849
 - Offices without POS ONE or the Delivery Confirmation handheld scanner

Continue to follow current Delivery Confirmation procedures for delivery of Signature Confirmation items.

Signature Confirmation does not affect the delivery standards for Priority Mail or Package Services.

Electronic Option for Signature Confirmation Customers



Note to Facilitator: Review the following with Associates.

The electronic option for Signature Confirmation service is designed for small and large mailers who want "proof of delivery" for their packages. These mailers must pass a USPS certification process and establish an electronic link with the Postal Service to electronically exchange acceptance and delivery data.

The Electronic Option:

- Signature Confirmation is available for Priority Mail and all sub-classes of Package Services
- Designed for small and large business customers.
- Customers may print their own Signature Confirmation barcoded labels or use the USPS printed Label 315.
 - Customer printed labels will usually be black and white.
 - USPS Label 315 Signature Confirmation is hot pink. Label 315 is being printed with an "e" in the left top corner so employees will be able to recognize our electronic customers.
- Electronic customers must provide the USPS with an electronic file of Signature Confirmation pieces that have been entered for mailing and must also retrieve delivery status information electronically.
- Electronic customers can request the image recipient's signature be mailed or faxed to them by calling 1-877-264-9693, Option 1 or on our website at www.usps.com.
- NOTE: Electronic fees for Signature Confirmation service are different than retail option fees.

IF YOUR CUSTOMERS ARE INTERESTED IN THE ELECTRONIC OPTION PLEASE HAVE THEM CONTACT THE DISTRICT MARKETING OFFICE FOR FURTHER ASSISTANCE OR CALL OUR TOLL-FREE HELP DESK NUMBER, 877-264-9693, OPTION 1.

Selling Signature Confirmation

Every day retail clerks are asked by their customers, “When do you think it will get there?” Now clerks have another simple-to-use, low-cost option to satisfy the needs of their customers. Delivery Confirmation provides a distinct opportunity for customers to quickly receive peace of mind when their article arrives. All clerks will be able to suggest this new service by simply asking, “Would you like proof of mailing or delivery?”.

Key questions to ask when determining customer needs:

- How soon do you want it to get there?
- Do you need proof of mailing or delivery?
- Would you like to confirm delivery?
- Do you need insurance?
- Do you need (mention specific product) today?
- Would you like to use your debit/credit card?

Important features of Delivery Confirmation

- Easy-to-access delivery information
- Customers can call 1-800-222-1811
- Customers can visit the Postal Service website at www.usps.com
- Can be combined with insurance, registry, C.O.D., Return Receipt for merchandise, and Special Handling.

Revenue Protection

Revenue protection guidelines must be applied to Signature Confirmation:

- Revenue protection is the responsibility of all postal employees
- Signature Confirmation fees, in addition to postage, must be collected
- When Signature Confirmation is combined with other special services, fees for all services must be collected
 - For example: a customer mails a Priority Mail item with Signature Confirmation service, Numbered Insured and a Return Receipt. The postage and the fees for Signature Confirmation, Numbered Insured and a Return Receipt must all be collected
- The receipt portion of the Signature Confirmation label must be properly completed when the piece is presented at the retail counter
 - The Priority Mail or Package Services box must be checked for refund purposes
 - Round date the receipt
 - Optional: the customer may fill out “Article Sent To” box if desired – this information is not necessary for Postal use
 - Customers may need to be made aware of the **Waiver of Signature** option

Refunds for Signature Confirmation

Refunds for Signature Confirmation are handled much like refunds for other Special Services:

Who May Apply:

- The sender may apply for a refund of the Signature Confirmation **service fee** on a PS Form 3533.
- The round dated Signature Confirmation receipt and the USPS Signature Confirmation response letter dated at least 30 days from the date of mailing must be attached.

Conditions For Refund:

- If there is no signature, signature alternative or legal mark of the recipient on the USPS response letter or no record of delivery for the Signature Confirmation piece, the service fee can be refunded.
- With **Waiver of Signature**, the delivery employee’s signature constitutes a valid signature. No image of the delivery employee’s signature will be provided on the customer response letter.
- A refund of the service fee can be applied for when requested delivery information is not available 30 days from the date of mailing.

Record Signature Confirmation refunds in AIC/GLA 553.

Retail Acceptance Process

The selling and acceptance of Signature Confirmation service at the retail counter is similar to all our special services, with few exceptions:

How is it similar

- It has a special “hot pink” PS Form 153 to distinguish the service.
- The PS Form has a detachable receipt for the customer.
- The receipt is round-dated.
- A fee is charged in addition to postage.

How is it different:

- It can be combined with other special services.

The Signature Confirmation Label (PS Form 153)

- Color – Hot pink
- A three-part form:
 - The customer receipt (contains the Signature Confirmation Number, the toll free number and website address, and information on the service).
 - A self-stick barcode label.
 - A **Waiver of Signature** Option (customer may request a waiver of signature, which authorizes the delivery employee to sign for the article if the addressee/agent is not available to accept the item and it can be left in a secure location).
 - Detach both parts of the gummed label and attach to the mailpiece, when the customer chooses the waiver of signature option.
 - NOTE: A copy of the signature image will not be available to the customer with this option.
- The labels are available in post offices, stations, branches, CPO's, CPU's and from rural carriers and HCR's.
- Customers can pick up labels and take them back to their businesses or homes for later use like most other Special Services labels.

Waiver of Signature

Customers may waive the recipient signature by:

- **Checking the Waiver of Signature box,**
- And signing on the Customer Signature line of the PS Form 153 Waiver of Signature portion.

This option authorizes delivery employees to sign for the article on the first delivery attempt to the listed address, if the addressee or addressee's agent is not available to accept the mailing and the item can be left in a secure location.

Signature Confirmation

Retail Acceptance Practice Exercises

1. A customer requests Signature Confirmation service on a piece of Priority Mail they are mailing. Scan the label below and make the appropriate entries. The destination ZIP Code is 62946.



2. A customer brings in a piece of Library Mail they would like to return and requests Signature Confirmation service. Scan the label below and make the appropriate entries. The destination ZIP Code is 58053.

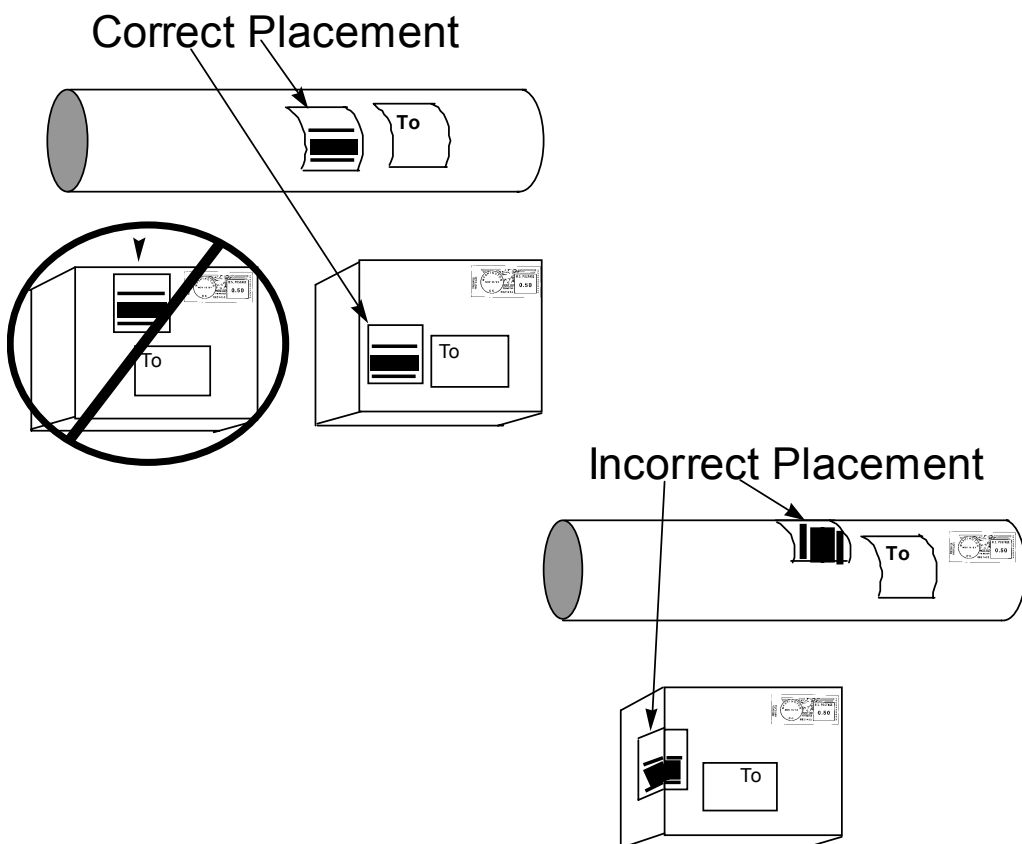


Placement of the Signature Confirmation™ Label, PS Form 153

Important: The label must always be placed so that it can be easily identified and scanned.

Label Placement:

- On address side of package
- To the left of the delivery address, ***with less than a ½ inch between the Signature Confirmation label and the address, this change applies to Delivery Confirmation Labels as well.*** On odd-sized packages the label must be placed so that the barcode can be scanned (i.e., on tubes, place the label so that the barcode is horizontal to the length of the package).
- Do not bend label around the package edge.
- Do not cover barcode with tape or plastic wrap.
- When used in combination with other special services, the other special service label goes to the right of the return address.
 - Keep the two labels as close to each other as possible for easy identification at delivery.



Module 21:

Delivery Confirmation

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Module 21: Delivery Confirmation

Terminal Objective:

Upon completion of this module, future Associates will be able to sell, accept, and process articles for Delivery Confirmation.

Enabling Objective:

Upon completion of this module, future Associates will be able to:

- Define Delivery Confirmation
- Explain what other special services can be combined with Delivery Confirmation
- Explain how the Delivery Confirmation System works
- Demonstrate selling Delivery Confirmation
- Explain revenue protection for Delivery Confirmation
- Explain the refund process for Delivery Confirmation
- Demonstrate accepting articles for Delivery Confirmation
- Demonstrate processing articles for Delivery Confirmation

Time Allocated: 30 min.

Instructional Method: Presentation, Discussion, Demonstration, and Role Play

Summary of Instructional Plan: Facilitator will explain the benefits and features of Delivery Confirmation. Facilitator will demonstrate the selling, accepting and processing articles for Delivery Confirmation.

Materials Required:

Instructor: Rip Chart, Colored Markers, PS Form 152, Scanners, IRT/POS Round Date, and video “Delivery Confirmation”.

Future Associate: Workbook, pens and pencils

PRESENTATION

Define Delivery Confirmation



Note to Facilitator: Show the video “Delivery Confirmation”

Delivery Confirmation has unique features that are designed to add value to retail customers’ use of Postal Services products. Delivery Confirmation is a special service that will provide easy to use access to delivery information at a low cost. The following are important facts that you need to know about the retail option of Delivery Confirmation.

Special service:

- Sold for use on Priority Mail and Package Service - [Parcel Post, Bound Printed Matter, Library Mail, and Media Mail
- Fees are charged in addition to postage, similar to other special services
- Service is available only on domestic mail (not APO or FPO)

Low cost:

- Review current ratefold for prices.

Easy-to-Access delivery Information:

- Customers can call 1-800-222-1811
- Customers can visit the Postal Service web site at www.usps.com

Delivery Information available:

- Date
- Time
- ZIP Code
- Delivery status - delivered, attempted, forwarded, or returned to sender

Special services that can be combined with Delivery Confirmation when additional fees are paid:

- Registry, Insurance (minimum or numbered), COD, Special Handling
- Return Receipt when purchased with registry, insurance (numbered) or COD
- Restricted Delivery when purchased with registry, insurance (numbered) or COD
- Return Receipt for Merchandise

NOTE: Return Receipt and Restricted Delivery cannot be combined with Delivery Confirmation without the purchase of registry, Insurance (numbered) or COD.

Certified Mail **cannot** be combined with Delivery Confirmation.

How the Delivery Confirmation System Works

A basic understanding of how the Delivery Confirmation system works is essential. Acceptance and delivery information is collected, transmitted and stored in a central database. This information is then available to the customer through a toll-free number or the Postal Service web site on the Internet.

Acceptance information is captured with:

- An IRT wand (Unisys III and MOS)
- A POS ONE terminal scanner
- A Delivery Confirmation scanner (to be used by offices with Unisys II or without IRT/POS ONE scanning capability)
- An electronic file (electronic option customers)

Delivery status information is captured with:

- A Delivery Confirmation scanner

Customers can access delivery status information:

- Customers can call 1-800-222-1811
- Customers can visit web site at www.usps.com
- Electronic file transfer (electronic option customers)
- Information will be available the evening of delivery or attempted delivery.

Delivery Confirmation does not affect the delivery standards for Priority Mail or Package Services.

Electronic Option of Delivery Confirmation



Note to Facilitator: Review the following with future Associates.

As with the retail option of Delivery Confirmation, the electronic option is designed to meet specific customer needs and add value to shipping with the Postal Service. It provides shippers with an economical, easy-to-access delivery information system. The following general information highlights how the electronic option is different from the retail option.

The Electronic Option:

- Customer must be able to send and receive information electronically
- Primarily designed for large volume shippers
- Customers must pass USPS certification process
- See current rate fold for Package Services and no additional charge for Priority Mail
- Customers can print their own Delivery Confirmation barcoded labels or use Postal printed barcode labels

Because of the similarity of Delivery Confirmation PS Form 152 (retail form) and Label 314 (electronic option label printed by the USPS), electronic option mailers have had items returned postage due in error. Although the labels are similar, there are differences to assist employees in distinguishing our electronic customer labels. Label 314 used by our electronic option customers has “314” printed in the lower right corner and the label corners are rounded. The retail PS Form 152 has sharp corners and no form number on the barcode portion of the form that is attached to the mailing.

If you have customers interested in using the electronic option, give them the National Customer Support Center number, 1-877-264-9693 to call for more information.

Selling Delivery Confirmation

Every day retail clerks are asked by their customers, “When do you think it will get there?” Now clerks have another simple-to-use, low-cost option to satisfy the needs of their customers. Delivery Confirmation provides a distinct opportunity for customers to quickly receive peace of mind when their article arrives. All clerks will be able to suggest this new service by simple asking, “Would you like proof of mailing or delivery?”

Key questions to ask when determining customer needs:

- How soon do you want it to get there?
- Do you need proof of mailing or delivery?
- Would you like to confirm delivery?
- Do you need insurance?
- Do you need (mention specific product) today?
- Would you like to use your debit/credit card?

Important Features of Delivery Confirmation:

- Easy-to-access delivery information
- Customers can call 1-800-222-1811
- Customers can visit the Postal Service website at www.usps.com
- Can be combined with insurance, registry, C.O.D., Return Receipt for merchandise, and Special Handling.

Revenue Protection

Revenue Protection

- Revenue protection is the responsibility of all postal employees.
- Delivery Confirmation fees, in addition to postage, must be collected.
- When Delivery Confirmation service is combined with other special services, all fees in addition to postage must be collected.

For example: A customer mails a Priority Mail parcel with Delivery Confirmation service, numbered insurance and a return receipt. The postage and the fees for Delivery Confirmation, insurance and the return receipt must all be collected.
- The receipt portion of the Delivery Confirmation label must be properly completed when the piece is presented at the retail counter.
 - Check either the Priority Mail or the Package Services box for refund purposes.
 - Round date the receipt
 - Optional: Customer fills out “Article Sent To” box if desired - this information is not necessary for Postal use.
 - Some Customers detach the receipt portion of the PS Form 152 prior to the time of mailing.

Delivery Confirmation service with Priority Mail and Package Services can be accepted without the receipt portion of the form. However inform the customer that a refund for the special service fee cannot be processed without the round dated receipt.

Refunds for Delivery Confirmation



Note to Facilitator: Refer to DMM.

The Delivery Confirmation Label

PS Form 152

- Color- Neon green
 - The two-part form includes:
 - Self-stick barcoded label
 - Detachable mailing receipt that the customer will need for delivery status look-up.
 - Package ID number
 - Toll-free number
 - Web site address
 - The labels are available in post offices, stations, branches, CPOs and CPUs, and from rural carriers and HCRs



Note to Facilitator: Provide each Future Associate PS Form 152.

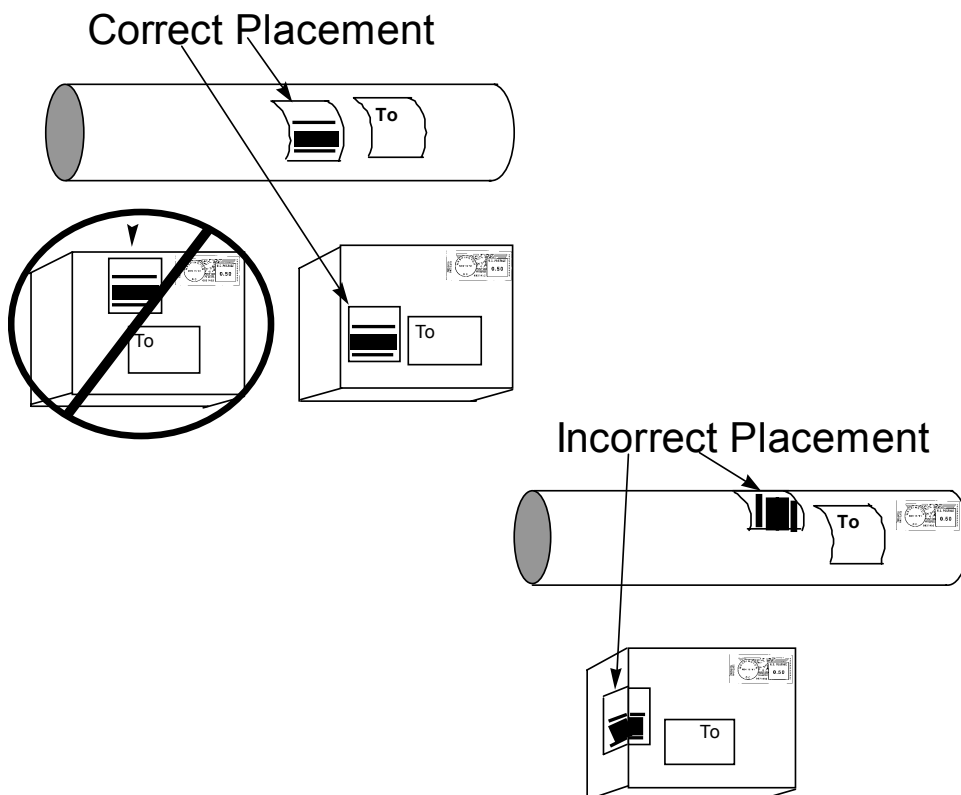
- Customer can pickup labels and take them back to their businesses of homes for later use like most other special service labels.

Placement of the Delivery Confirmation Label, PS Form 152

Important: The label must always be placed so that it can be easily identified and scanned.

Label Placement:

- On address side of package
- To the left of the delivery address, **with less than ½ inch between the Delivery Confirmation label and the address.** On odd-sized packages the label must be placed so that the barcode can be scanned (i.e., on tubes, place the label so that the barcode is horizontal to the length of the package)
- Do not bend label around the package edge.
- Do not cover barcode with tape or plastic wrap.
- **When used in combination with other special services, the other special service label goes to the right of the return address.**
Keep the two labels as close to each other as possible for easy identification at delivery.



Exercises



Note to Facilitator: Scan labels in Associates Workbook

1. A customer requests Delivery Confirmation service on a piece of Priority Mail he is mailing. Scan the label below and make the appropriate entries. The destination ZIP Code is 62946.



2. A customer brings in a Standard Mail (B) parcel she would like to return and requests Delivery Confirmation service. Scan the label below and make the appropriate entries. The destination ZIP Code is 58053.



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Module 22:

Claims and Inquiries

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Module 22: Claims and Inquiries

Terminal Objective:

Upon completion of this module, future Associates will be able to accept indemnity claims from postal customers for domestic and international mail.

Enabling Objective:

Upon completion of this module, future Associates will be able to:

- Explain and demonstrate the use of PS Forms 1000, 1510, 542, 3862 and 2855.
- Explain the Quick Reference Guide for Claims

Time Allocated for this Module: 1 Hr.

Instructional Methods: Presentation, Demonstration, Question/Answer, Role-Play, Simulation (mock lobby).

Summary of Instructional Plan:

The instructor presents information about the purpose, features, customer benefits, policies and procedures of the indemnity claims process. **A representative from the District Claims Office may cover this module—consult local district policy. Provide a copy of module to assist in presentation to ensure key points are presented.**

Materials Required:

Instructor: Rip Chart, colored markers, PS Forms 1000, 1510, 542, 2855, 3533, 1509, 3862 and 1500 and Quick Reference Guide (obtain from local claims office)

Future Associates: Workbook, pens or pencils, and colored markers.


PRESENTATION

1. Customer Service

As Sales and Services Associates we have an opportunity to reduce the number of claims filed by our customers. Most claims can be avoided if we simply follow the proper acceptance procedures we learned in the domestic Mail Module. Our customers depend on us to safely deliver the items they mail at our retail counters. If we are not paying attention to the condition of the items when they are mailed we greatly increase the possibility of a failure to provide the service our customers expect and deserve. For instance, a framed picture mailed in a padded envelope is probably going to be damaged when it arrives. Imagine the delivery employee who can hear the broken glass inside as they make the delivery. Imagine that you are delivering the item. What would you say to that customer? Keep in mind that every time you accept a package the reputation of our company is primarily resting on your ability to determine the mailability of the item. You have the power to reduce the need for our customers to file claims, and increase customer satisfaction by checking these guidelines on every item mailed at your counter.

- **Addressing** A return address is required for all accountable mail. New retail equipment will provide the city and state when you key in the ZIP Code, verify this information on the mail piece. Encourage the use of our web site for ZIP look-ups and confirmation of mailing addresses. (The majority of mail sent to the Mail Recovery Centers bears no return address.)
- **Packaging** Is the container sturdy enough to withstand normal handling in the mail stream? Is the cushioning sufficient to protect the contents? (A claim will be denied if the damaged insured item was not properly packaged.) Is the package secured with good quality tape?

2. PS Form 1000

 **Note to Facilitator:** Hand out PS Form 1000, Domestic Claim or Registered Mail Inquiry to future Associates and review.

Postal customers may use PS Form 1000 when presenting indemnity claims for domestic, registered, or express mail. Claims may also be filed for domestic COD mail service. Indemnity provides limited insurance against loss, rifling, or damage in transit.

3. Requirements for submitting claims

In addition to completing PS Form 1000, a claimant must meet a proof of loss requirement. The customer must provide proof of complete or partial loss (depending on which claim they are submitting). Proof of loss is not required for COD, Registered, or Express mail claims. Note: only the mailer may file a claim for complete loss.

The following are acceptable as proof of loss:

- A letter or statement from the addressee after the date the article was mailed, stating that the addressee did not receive the article.
- The addressee may indicate on the appropriate section of the claim form that the article was not received, then sign and return it to the sender. Retain all items pertaining to the claim in the post office until the claim is settled. Do not return to the mailer unless claim is for partial loss.

Note the condition of the wrapper and its contents for the claims adjudicators at the St. Louis ISSN.

To ensure that the claim will be quickly processed, be sure you have:

- Evidence of insurance
- A designated payee
- Mailer and addressee signature
- The location of the damaged article or disposition thereof.
- Proof of value
- Original packaging with insured indicia
- Proof of mailing
- Claims paid by money order offset by AIC/GLA 539

4. Forwarding Claims

Sales and Services Associates are required to forward PS Form 1000 with the supporting documentation to the claims and inquiry section or to the designated employee in the office handles claims and inquiries.

PS Form 1510, mail loss/rifling report



Facilitator-hand out PS Form 1510 to participants and review

Use this form to report the loss, rifling, and mistreatment of ordinary and certified mail. PS Form 1510 may be initiated by either the mailer or addressee by telephone or in person at any post office.

4. Claims under \$50.00

Customer must have proof of value, original packaging with insured indicia, and proof of mailing. Claims paid by money order offset by AIC/GLA 0 539

5. PS Form 1509 – Recall of Mail

6. PS Form 1500 – Prohibitory Order

7. PS Form 3862-


Sender filing claim, addressee has damaged article. Post Office where claim was filed forwards PS Form 3862 to Post Office of addressee.

8. Claims for international

PS Form 542, Inquiry about a Registered Article or an Insured Parcel or an Ordinary Parcel.

PS Form 2855, Claim for Indemnity-International, Registered, Insured and Express Mail. PS Form 2855 may be filed on damaged mail articles coming into the country.

9. PS Form 3533 - Application for refund of Postage.

 **Note to Facilitator:** Hand out the above mentioned forms and discuss with the future Associates. If using POS ONE, a customer receipt for a claim must be generated.

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Module 23:

Public Service Agencies/ Change of Address

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Module 23: Public Service Agencies/ Change of Address

Terminal Objective:

Upon completion of this module, future Associates will be able to discuss the Postal Service's participation in public service/government agency programs.

Enabling Objectives:

- Identify and describe the passport program.
- Identify and describe the migratory bird stamp program.
- Explain the procedures for registering individuals for the selective service system.

Time Allocated for this Module: 15 minutes

Instructional Methods: Presentation, Discussion, and Question/Answer.

Summary of Instructional Plan:

The facilitator introduces the module by summarizing the topics to be covered and then explains the purpose, features, and customer benefits of the USPS role in government agency programs. The facilitator explains the role of Sales and Services Associates in these programs and the importance of Sales and Service Associates conducting these transactions in a courteous and professional manner.

Materials Required:

Instructor: Rip Chart, colored markers, samples of Bird Stamps, Selective Service Forms, PUB 75, PS Form 3546, PS Form 2982 (Carrier Sheet)

Future Associates: Workbook, pen or pencils, colored markers.

PRESENTATION

 **Note to Facilitator:** Explain the following:

Passport Applications

Passport applications are only accepted in designated post offices. A passport is an internationally recognized travel document certifying the identity and nationality of the bearer. A passport indicates that its bearer is entitled to receive the protection and benefits of the diplomatic and consular offices of his or her country while abroad. In essence, it is a request on the part of the issuing government that citizens and officials of foreign governments be able to travel in their territories and afford the traveler all lawful aid and protection.


To obtain a U.S. passport, a person must apply for it. The Postal Service has the authority to accept passport applications. A U.S. passport may be issued only to a citizen or national of the United States.

Emphasize that future Associates who will be required to accept passport applications will receive training on accepting passport applications.

Bird Stamps

The migratory bird hunting and conservation stamps are required by federal law to hunt migratory birds such as ducks, geese, etc. Post offices act as agents of the federal government in selling these stamps to provide a convenient location for purchasing them. A new stamp is issued every year and is on sale for a specified period of time. The stamp remains on sale in philatelic centers for two years.

Selective Service Program

 **Note to Facilitator:** advise future Associates that customers now fill this form out completely and mail themselves. Forms are now kept in postal lobbies for customer use.

Change of Address

Note to Facilitator: Hand out PUB 75 and PS Form 2546 to each associate.

Change-of-Address Order

Records of permanent change-of-address orders are kept by city delivery post offices for 18 months, for forwarding and for address correction purposes, from the end of the months when the change takes effect. A record of change-of-address orders from general delivery to a permanent local address without time limit is kept for 6 months. A record of change-of-address orders to other than a permanent local address is kept 30 days.

Note to Facilitator: Show Future Associates how to properly complete change of address form. Explain the benefits of customers completing this form correctly.

Note to Facilitator: Explain and show to Future Associate PS Form 2982.

Temporary Forwarding

Customer temporarily moving away may have mail forwarded for a specific time, but not to exceed 12 months. The customer must show beginning and ending dates in the change-of-address order.

Note to Facilitator: Explain to Future Associate purpose of PS Form 3546 and proper completion of this form.

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Module 24:

How to Handle Irate Customers

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Module 24: How to Handle Irate Customers

Terminal Objective:

Upon the conclusion of this module, future Associates will be able to handle irate customers in a professional and courteous manner.

Enabling Objectives:

Upon conclusion of this module future Associates will be able to:

- List steps to be used in handling an irate customer.
- Explain why good listening skills is an effective tool.
- Explain importance of asking questions.

Time Allocated for Module: 1 Hr.

Instructional Methods: Presentation, Discussion, video (Sommers) “Handling Angry Customers”

Summary of Instructional Plan:


Facilitator will explain the steps in handling an irate customer.

Materials Required:


Instructor: Rip Chart, colored markers, VCR and video (Sommers) “Handling Angry Customers”

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION

 **Note to Facilitator:** Introduce video “Handling Angry Customer”, the review and discuss key points.

1. Facilitator will explain the first step to handling an irate customer is to keep cool. Don't get on the same level as the customer. Don't take it personally. Remain calm.
2. Explain that listening attentively is very important. Show the customer that you are a concerned employee of the company willing to personally help with their problem. Acknowledge that you understand what the problem is (by paraphrasing). Attentive listening involves 6 steps.
 - Eye contact
 - Responding to customer
 - Rephrase
 - Empathy
 - Don't express your anger
 - Refrain from interruption
3. The facilitator will emphasize the importance of writing things down. It shows the customer that you are really concerned with their problem and want the facts right.
4. Facilitator will tell the participants that asking questions to clarify the problem is very important in solving the customer's problem. You must try to obtain pertinent information by asking opened ended questions. (who, when, what and how?).

 **Note to Facilitator:** Inform the future Associates that customers can now use the Call Center to voice concerns.

Exercise

Facilitator will divide the class into subgroups and ask each group to create a five minute scenario involving an irate customer. Each subgroup will select one member to role play an irate customer, and another to perform as a Sales and Services Associate. The subgroups will then critique each others' role plays, lead by the facilitator, involving the effectiveness of the window clerk.



Note to Facilitator: Both facilitators will role play a scenario involving an irate customer. Then get a future sales Associate to volunteer to role play as the Sales and Services Associate with the facilitator acting as the irate customer.

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Module 25:

Union Module

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Module 25: Union Module

Terminal Objective:

Upon the completion of this module, participants will be able to understand their contractual rights under the current contract regarding employer's claims and the handbooks and manuals that govern window clerk issues.

Enabling Objectives:

Upon the completion of this module future Associates will be able to:

- Recognize improper security practices
- Ensure proper training with the OJI is conducted
- Explain Article 28 (Protection of each employee's rights)

Time Allocated for this Module: 1 hr.

Instructional Method: Lecture, discussion, ("Video in production

Summary of Instructional Plan:

Facilitator explains the provisions of Article 28, leads a discussion concerning security for window clerks, and explains the OJI training.

Materials Required:

Instructor: Facilitator's book "(Video)"

Future Associates: Workbook, pens or pencils

Presentation

1. Facilitator will lead a discussion on Article 28-Employer Claims covering shortages.

Employee must exercise reasonable care in protecting their stamp stock and cash while performing their duties.

Audit or Count Drawers

An audit of each employees fixed credit must be conducted no less frequently than every four (4) months.

Audit must take place away from the window.

The F-1 handbook states that the count should be conducted in a “quiet area”.

Audits should not be conducted at the window.

Do not perform any transactions while an audit is being conducted.

Count your own drawer. Do not watch your supervisor count your drawer. Both the employee and the supervisor conduct counts. The F-1 states that the employee must be given the opportunity to be present at the count.

If you are out of tolerance (short or over), do not sign the audit sheet. Request a re-count of your stock. The F-1 states that a recount is only taken at the request of the employee, not of management. By signing the audit sheet, the audit is over.

If there is a shortage, management must issue a letter of demand. The F-1 states that all employees must receive written notice of money demand. Your supervisor must give you written notice and provide you with your rights to file a grievance. Do not pay just because a manager says you have to. You should request to talk with a steward. Any overage or shortage should immediately be placed in trust or suspense.

If a grievance is initiated, regardless of the amount of the debt, collection of the debt will be delayed until the grievance is settled.

2. Upon completion of the classroom portion of the training, each employee will be assigned to an On the Job Instructor (OJI). The OJI will work with employee to cover 32 core items that are necessary in order to take the exam. The employee has the right to decline to sign and/or take the exam if he/she feels that the training was not adequate. Employees will be graded by the OJI , upon completion of the 32 core items. If there is time allowed, employees will be trained in additional items until completion of the work week.

Security Violations

Adequate Security- Management is responsible to provide you with adequate security. Locked drawers can be opened without a key. These types of violations, should be written up on the APWU, Report of Security Problem or Poor Financial Practice. Make a Copy and submit to your supervisor for answer. It does not need to be the APWU form, but it must be in writing.

A. Locks must be changed on your drawer prior to it being issued to you.

The F-1, section 426.67 requires locks to be changed whenever an employee relinquishes control, for any reason, usually when they bid out.

B. Duplicate Keys Envelope (Form 3977)

Envelopes must be checked every six (6) months to assure no one has tampered with it.

C. Annual Lock and Key Examination

The F-1 requires that a unit's supervisor must take an annual lock and key exam of all locks and keys in the unit, except for duplicate keys.

D. Does or did anyone have access to your drawer?

The F-1 states no employee, supervisor, or Postmaster may have access to the stamp credit of another employee.

E. Stamp Orders

The F-1 states that stamp orders are filled on a weekly basis.

F. Count all Stamp Stock that is received.

Stamp stock should not be given to clerks unless there is time available for the clerk to count the stamp stock. This should not be conducted between customers.

No one else may work out of your drawer. Save all Form 1412, 1908, 17 and 3294's. Anything that will assist in helping trace the accountability.

Take the time to do things properly. If you are being pressured by a supervisor or postmaster into making errors or if you have any questions about financial accountability, see a Union Steward. Do not take risks that could lead to discipline.

- Were all of your postage stock and accountable items counted?
- Were you given an opportunity for rechecks of computations and a recount?
- Did you sign Form 3294 that you agreed to the count?
- Was the result of the count entered on Form 3368?
- Was your Step-1 grievance filed within 14 days of the date of the Letter of Demand?
- Are you provided with a locking drawer?
- Do you always lock your drawer if away for any reason?
- Have you exchanged stock without a Form 17?
- Was a Letter of Demand issued?
- Were you audited within four (4) months?
- Have you designated someone to count in your absence?
- Were you or your designee present at the count?
- Have you permitted anyone to work from your drawer?
- Do you get a receipt for all money turned in?
- Do you count all requisitions upon receipt?
- Have you reported faulty equipment as soon as it was discovered?
- Do you show all transactions of Form 1412?
- At the end of a day, do you run adding machine tape(s) of money orders and fees in numerical sequence?
- Do you enter money order numbers at beginning and end of tapes(s)?
- Do you verify that all vouchers are accounted for?
- If you have missing voucher(s), is drawer counted immediately and overages entered into trust?
- Do you enter money orders and fees on Form 1412?
- Accepting checks. Was check accepted for money order or food stamps?
- Was check made to Postmaster in the exact amount of transaction?
- Is a bad check list posted?

Take the time to do things properly. If you are being pressured by a supervisor, postmaster, or other Sales and Services Associates into making errors or if you have any questions about financial accountability, see a Union Steward. Do not take risks that could lead to discipline.

- If check was cashed for a person you know, was this noted on the check?
- If unknown, was a form of identification submitted?
- Was the form of identification one of the following; driver's license, military I.D. card, passport, or state issued I.D. Other credentials showing the signature and having serial number or other information which can be traced?
- Did you compare the signature on the check with the identification.
- Did the signature match?
- Upon leaving unit such as transfer, separation, etc., were the locks on the employee's stamp credit changed?
- Are master keys kept in Form 3977 and signed by Postmaster or designee and employer?
- Is safe combination changed when a person knowing the combination is separated, transferred, etc.?
- Is overage in your trust fund?
- If another employee has an overage, has permission been given to use?
- Do you have legal financial transactions with other employees? If so, please document.
- Have you attached other information that would show an appearance of relationship between shortage and another's overage.

Article 28

Employer Claims

The parties agree that continued public confidence in the Postal Service requires the proper care and handling of the USPS property, postal funds and the mails. In advance of any money demand upon an employee for any reason, the employee must be informed in writing and the demand must include the reasons therefor.

Section 1. Shortages in Fixed Credits

Employees who are assigned fixed credits or vending credits shall be strictly accountable for the amount of the credit. If any shortage occurs, the employee shall be financially liable unless the employee exercises reasonable care in the performance of his duties. In this regard, the Employer agrees to:

- A. Continue to provide adequate security for all employees responsible for postal funds;
- B. Prohibit an employee from using the fixed credit or other financial accountability of any other employee without permission;
- C. Grant the opportunity to an employee to be present whenever that employee's fixed credit is being audited and if the employee is not available to have a witness of the employee's choice present;
- D. Absolve an employee of any liability for loss from cashing checks if the employee follows established procedures; and
- E. Audit each employee's fixed credit no less frequently than every four months.

UNITED STATES POSTAL SERVICE
Labor Relations Department
475 L'Enfant Plaza SW
Washington, DC 20260-4100

June 17, 1987

Mr. Kenneth D. Wilson
Director, Clerk Craft Division
American Postal Workers
Union, AFL-CIO
1300 L Street, N.W.
Washington, D.C. 20005-3399

Dear Mr. Wilson:

This is in response to Mr. Tunstall's June 2 letter regarding the use of union-furnished Forms to report financial accountability problems as called for at part 141 .2 of the F-1 handbook.

The intent of the language at part 141 .2 is to require that employees notify their Supervisor in writing if they find a deficiency in the security of the equipment provided for the protection of accountable items. The language was written specifically not to require a certain form for such notice and, at this time, there is no plan to create such a form. Accordingly, the written notice may be provided in any reasonable format, including the form that has been developed by the APWU. The acceptance of the form, as with any other written notice, does not necessarily acknowledge that a security deficiency exists but does acknowledge that appropriate notice has been provided to management by the employee.

If you have any questions regarding the foregoing, please contact me at your convenience.

Sincerely,

Frank X. Jacquette, III
Labor Relations Executive
Programs and Policies Division
Office of Contract Administration
(202) 268-3823

BURDEN OF PROOF

Article 28, Section 1, has been interpreted by arbitrators to allow management to hold any employee accountable for a shortage or loss, unless the union shows the employee has exercised reasonable care or established one of the enumerated defenses discussed in the following sections. However, even in cases involving one of the enumerated defenses, conservative arbitrators' decisions almost always turn on whether the grievant is negligent, the union must generally show that something else, such as a particular failure by management, caused the loss, and that the grievant's negligence was not a contributing factor.

The responsibility of the union filling in possible gaps in evidence frequently leads to the denial of grievances, because in many cases, the specific transaction causing the loss is not known. Sometimes, however, an arbitrator will modify a grievance where proof of causation is lacking, if there seems to be some injustice in holding the grievant liable – for example, where physical security or work procedures are very poor, or the grievant's work record is very good or long. When an arbitrator is moved by those factors, he/she will generally either: (1) split the loss on grounds of fairness; (2) Adopt a comparative negligence approach; or (3) shift the burden of proof to management to show for example, that a proven lack of security did not cause the loss, or that the grievant's negligence was actually a contributing factor.

**MEMORANDUM OF UNDERSTANDING
BETWEEN THE
UNITED STATES POSTAL SERVICE
AND THE
AMERICAN POSTAL WORKERS UNION,
AFL-CIO**

Re: Stamp Stock Tolerances

The Financial Handbook for Postal Offices (F-1) shall be revised to reflect the following:

Amount of Stamp Stock	Tolerance
Up to \$30,000.00	\$50.00
\$30,000.01 to \$60,000.00	\$100.00
Above \$60,000.00	\$150.00

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Day Four Review

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Day Four Review

Terminal Objective:

Upon completion of this module, future Associates will be able to explain the days lessons.

Enabling Objective:

Upon completion of this module, future Associates will be able to demonstrate the objectives of the modules presented the forth day through interactive game.

Time Allocated for this Module: 45 Minutes

Instructional Methods: Lingo Bingo


Summary of Instructions Plan:

Facilitator will explain the rules of the game.


Materials Required:

Instructor: Blank Bingo Cards (can be a photocopy on paper)

Future Associates: No materials required

 **Facilitator's Note:** Conduct review in the format of a Bingo game.

- Pass out blank bingo sheets to future Associates and have them fill in all the blanks with things they learned throughout the day. (i.e. Dinero Seguro, Commemoratives, PS 3977, Article 28, PC Postage, Scanner, etc.)
- Since future Associates are completing their own blanks on the cards, all should look somewhat different (i.e. different subjects in different blocks) thus making it like a real “Bingo” game.
- Facilitator will provide answers in lieu of announcing bingo ball numbers to future Associates. (i.e. electronic money transfer service to Mexico, stamps that honor anniversaries/important people/or special events, place to put your personal password, protection of each employee’s rights, postage purchased via computer, equipment used to record Delivery Confirmation, etc.
- Future Associates can mark their cards by placing X’s in the correct spaces.
- Facilitator determines what constitutes “Lingo Bingo” (i.e. diagonal line, four corners, etc.)
- First one to holler “Bingo” wins!

 **Facilitators Note:** Possible choices future Associates may use to complete an entire card:

Retail Merchandise, Packaging Products, Phone Cards, Liberty Cash Cards, Dinero Seguro, PC Postage, Security/Sanctity of Mail, Delivery Confirmation, Scanner, Small Office/Home Office (SOHO), Priority Mail (class of mail for Del.Conf.), Website (way to access Del.Conf. info), Phone Call, PS Form 1000, Passport, Migratory Bird Stamp, Selective Service Program, Call Center (complaints), Article 28, Package Services, PS 3294, PS 3977, PS Form 17, Fixed Credit Counts, Letter of Demand.

Be prepared to provide answers/clues to these and possible others.

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Day Five

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Module 26:

Overview of Customer Relations

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Module 26: Overview of Customer Relations

Terminal Objective:

Upon the completion of this module, future Associates will be able to explain how “good” customer relations effects their jobs and the USPS

Enabling Objectives:

Upon the completion of this module future Associates will be able to:

- Demonstrate the components of GIST

Time Allocated for this Module: 1 hr.

Instructional Method: Role Play

Summary of Instructional Plan:


Facilitator will give instructions to the future Associates on each role play exercise.

Materials Required:

Instructor: Rip Chart, colored markers

Future Associates: Workbook, pens or pencils, and colored markers

PRESENTATION

 **Note to Facilitator:** Have future Associates complete the following role play exercises. Make sure that all role plays include GIST responses.

1. Summary: (role play)

A customer enters the post office and walks to the next available Sales and Services Associate. The customer informs the Sales and Services Associate that he's having a problem with his mail delivery. At this time the customer just wants this problem resolved.

Note: Remarks should include GIST responses.

2. Summary: (role play)

A customer enters the post office and walks up to the line where there are two other customers waiting to be helped. There are two Sales and Service Associates behind the counter one is dressed professionally (with a good attitude) and the other is unprofessional (with a bad attitude).

Note: Show why a customer might choose one Sales and Services Associate over the other.

3. Summary: (role play)

A customer enters the post office and walks to the next available Sales and Services Associate. The customer has just moved into the city and wants to get her mail delivery started

Note: remarks should include GIST and responses.

4. Summary: (role play)

A customer enters the post office and walks to the next available Sales and Services Associate. The customer informs the Sales and Services Associate that she has a letter that she wants to go the safest, fastest and cheapest way. It must get there as soon as possible.

Note: remarks should include GIST responses.

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Module 27:

Daily Financial Report

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Module 27: Daily Financial Report

Terminal Objectives:

Upon completion of this module, future Associates will be able to prepare the Daily Financial Report (1412), which includes closing out and submitting completed forms and supporting documents to supervisor.

Enabling Objectives:

- Learn how to do a preliminary and final PS form 1412.
- Describe procedures to remit advance and final deposits.
- Identify and describe accountability and security measures for close-out procedures.

Time Allocated for this Module: 3 hours

Instructional Methods: Presentation, Demonstration, Discussion, Role Play, Observed Performances, and Mock Lobby (simulation).

Summary of Instructional Plan:

The instructor introduces the module by summarizing the topics to be covered. The demonstration includes, counting, verifying, and submitting completed forms, with supporting documentation to the supervisor.

Note: use the mock lobby for conducting drills on close-out procedures.

Materials Required:

Instructor: Rip Chart, colored markers, PS Forms 1412, 3544, 3603, 1538, Money Order vouchers (Domestic and International), COD Tags, Custom Forms, Express Mail receipts and Check and Credit Card receipts.

Future Associates: Workbook, pens or pencils, colored markers and (POS ONE) Quick Reference Guide

PRESENTATION

Introduction

Future Associates handle many financial transactions. It is vital to handle all financial transactions accurately, and report them properly.

PS Form 1412 is designed to provide a running record of receipt controls, stamp accountability, and cash retained..

During this session we will discuss how to close out financial transactions. PS Form 1412 must be prepared in duplicate. You will give the original to a supervisor and you will keep the copy.

Preparing for Closing Out

The very first step in preparing to close-out is to gather and put into groups all materials related to the day's financial transactions. You should divide money into groups of cash, checks, and money orders; then group support documents according to the type of transactions.

Daily Close Out Procedures

Note to Facilitator: Use appropriate retail equipment checklist.

1. Group Receipts:

- A. Express Mail Receipts
 - 1. Other
 - 2. Federal
 - 3. Corporate
- A. Money Order vouchers (Domestic)
- B. Money Order vouchers (International)
- C. 3544 Receipt for Money
- D. 3603 Customer Meter Receipts
- E. 1538 Box Rent Receipts
- F. COD Tags
- G. Custom Forms
- H. Checks
- I. Credit Card / Debit Card Receipts

2. **Print lists if you have an IRT or run an adding machine tape if manual. Enter on 1412 in the appropriate AIC'S.**

IRT (UNISYS) Print List Menu

1. Checks
2. Domestic Money Orders
3. International Money Orders
4. Food Coupons *
5. Clerk Adjustments *
6. Item Count *
7. 3544's
8. 3603's
9. COD's
10. Customs
11. All Lists (never use)
12. Preliminary 1412
13. Express Mail
14. PVI Activity *
15. Future Use
16. Delivery Confirmation

* NOT USED *

Print Lists in any sequence you desire.

1 through 9 you must push # plus enter or 0# will enter it automatically

10 through 13 you enter # and it will automatically enter and print

Remember, Express Lists must be run separately for Other, Federal, and Corporate.

IRT (MOS) Print List Menu

- 01 Checks
- 02 Domestic Money Orders
- 03 3544
- 04 3603
- 05 Food Coupons *
- 06 Clerk Adjustments *
- 07 Item Count *
- 08 Express Mail
- 09 PVI Register *
- 10 PVI Activity *
- 11 Preliminary 1412
- 12 International Money Orders
- 13 COD'S
- 14 Customs
- 15 Delivery Confirmation
- 16 PS 1538 *

* NOT USED *

Print list in any sequence you desire

Remember, Express lists must be run separately for Other, Federal, and Corporate.

3. Match Receipts to Lists

Verify lists are correct. Make any corrections if necessary.

Use error correct menu to correct checks or receipts

4. Credit Card Imprinter List

- A. Print clerk list hit Function key, #3, Clerk ID, password
- B. Verify credit/debit card receipts to Imprinter List
- C. Verify sequence of Receipts

5. Verify Credit Card (shift-AIC-762) *correct if necessary

Verify Debit Card (shift-AIC-772) *correct if necessary

6. NOW LET US ADJUST YOUR MONEY

Press SHIFT + MISC AIC together, then 752 – This shows the amount of cash you are turning in. You will have to adjust up or down to match your count sheet to the even dollar amount.

To Increase – Press “Postage Stamps” and add the amount to postage sales. “Total Total”

To Decrease – Press “Postage Stamps” then “Error Correct” enter the amount that you are over. “Total Total”

Then check your amounts again “SHIFT + MISC AIC” together then 752. Does it match?

Cash must be the same amount as AIC 752 in IRT

7. REMOVE BILLS FROM YOUR DRAWER

ALL \$100.00

ALL \$50.00

ALL \$20.00

ALL \$10.00

Maybe some \$5's + \$1's

8. RUN PRELIMINARY 1412

Turn-In with all receipts to the T-6, Postmaster, or Supervisor with checks and cash. Wait until your checks, documents, and cash has been verified and your Preliminary 1412 has been initialed by consolidator.

9. RUN FINAL 1412

After everything is checked you run your Final 1412, sign it, keep your copy, turn in original.

Remember, whenever you are counting funds for remittance always do so away from customers view. Whenever you are away from your cash drawer (such as break or lunch) be sure it is locked and secure.

The last step in closing out is for you to store and secure your cash drawer. You must lock your money orders in a secure container. It is important that you secure these items because you are responsible and will be accountable.

DAILY CLOSEOUT POS ONE IBM - Use Front Office Quick Reference Guide

DAILY CLOSEOUT POS ONE NCR

Students should refer to quick reference guide page 5-2

End of day Clerk

- 1 Press CLERK Services/Back Office (static key).
- 2 Select Administrative Functions (Dynakey)
- 3 Select Reports (Dynakey).
- 4 Select CLERK FINANCIAL REPORT 1412
- 5 PRINT REPORT
Print any reports that are needed.
Usually you will need to print 07 - 17 - 18 - 27 - 33
- 6 RETURN TO BROWSER
- 7 END CLERKS DAY
- 8 PRESS COUNT FINAL DEPOSIT
9. Press Personal Check
10. Toggle highlighted check to verify (note all checks must be toggled)
ACCEPT KEY WHEN ALL ARE CHECKED
11. ENTERING CASH RETAINED
Press retain cash dynakey (you will enter your \$100.00 plus any odd cents) key
in this amount and press ENTER. Press ACCEPT.(dynakey)
12. COUNTING CASH
To get the correct amount you will need to go to the Available For Deposit line
from the end of clerks day summary screen. (write this number down).

Press COUNT FINAL DEPOSIT dynakey
press CASH dynakey

Use up/down to scroll to the denomination and enter the quantity of the bill of that value,
do this for each denomination of bill that you are remitting.

Press ACCEPT

- 13 FINISHING THE END OF DAY

Press SIGN OUT / then Press PRINT REPORTS AND SIGN OUT.

EXERCISES

INSTRUCTIONS MOS/UNISYS IRT

You are to do the following transactions that simulate doing a days business at the window. You will be given a new disk, the opening accountability of this disk will be \$5000.00, you will need to set up money orders first number 12345678000 (100 sets). After you are done you will need to run all end of day reports that relate to the items that you have done, verify these lists with your instructor, if incorrect make corrections, if correct you can clear check list. Verify your 762,772, and 752. Adjust your cash, run preliminary 1412 and verify with your instructor. Finally you can run your Final 1412

INSTRUCTIONS POS ONE NCR/IBM

You are to do the following transactions for the day. You will be given your Logon and Password by your instructor. Follow procedures on page 5-4 of your quick reference guide to set up your money orders (you will also get 6 money orders from your instructor)

When you are done you will need to do your close out procedures as outlined in your reference guide on page 5-2. If you have any questions now or during the exercise ask your instructor.

1. Customer wants 2 rolls of stamps pays by business check from the R&M Construction company.
2. Next person wants 1 roll of stamps and pays with Visa card.
3. Customer wants 10 pretty stamps.
4. Sell 1 coil of stamps, payment exact cash
5. Customer wants 3 books of Non-Stick stamps, and pays with Debit Card.
6. Providence Medical wants 1 large roll of stamps (500) pays by check.
7. Sell Domestic Money Order for \$25.00
8. Your next customer wants 2 Duck stamps.
9. Sell 70 Postal Cards and 20 Stamps for Post Cards, pays with credit card.
10. Jim Smith pays for his 6 month #1 box rent renewal with his personal check.
11. Customer wants 10 bucks worth of stamps.
12. Next person wants 4 rolls of stamps and pays with Credit Card.
13. Acme Auto closes out their PO Box, Refund 2 keys.

14. Send First Class letter, Certified, with a Return Receipt. USE PVI, pay cash.
15. Send 2 packages each weighing 3 lbs, Priority Mail, Insure each for \$150.00, use PVI, pay with Credit Card.
16. Customer has a 3849 for a Postage due letter for .44, exact cash.
17. The Big Bag Co. wants 3 coils of stamps, pays by check.
18. Moore Plumbing wants 2 books of stamps and a small padded bag, by check.
19. Mom's Grocery rents a #2 Box #169, with 2 keys, pays by check.

YOU GO TO LUNCH (DO ADVANCE DEPOSIT IF REQUIRED).

20. Customer wants 5 coils of stamps, pays as cash.
21. Sell 3 books of stamps and a 18 lb package Priority Mail, to zone 2, with delivery confirmation, pay with \$30.00.
22. Mr. Miller wants 2 rolls of stamps and 10 Love stamps, pays by check.
23. Sell 3 Domestic Money Orders, 1 - \$100.00 and 2 - \$500.00 each.
24. Send 2 packages Priority Mail, one weighs 1 lb and the other weighs 2 lbs.
25. Sly Fox pays his 6 months box rent #1, pays with his check.
26. Sell Money Order for \$125.00, pays with Debit Card.
27. Kitty Kat wants 1 coil of stamps and one sheet of 50 commemorative stamps, pays with check.
28. Customer has 3849 for Postage Due Package, \$3.15, exact cash.
29. The Acme Collection Agency wants 3 keys for their box #308, cash.
30. Diggy Dog writes a check for 20 - 20 cent stamps, and a sheet of 50 commemorative stamps.
31. Customer wants 25 stamps, pays cash.
32. Sell 10 coils of stamps, pays by cash.
33. Customer wants 1 box of 500 #10 plain stamped envelopes, pays by cash, use AIC 846 for offset.

Course Review

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Course Review

Terminal Objective:

Upon the completion of this module, future Associates will be able to explain the lessons of the entire course.

Enabling Objectives:

Upon the completion of this module, future Associates will be able to demonstrate the objectives of this course through questions and answers.

Time Allocated for this Module: 2hrs.

Instructional Methods: Question and Answer Game

Summary of Instructional Plan:


Facilitator will give instructions to the future Associates on how to play the game.

Materials Required:


Instructor: Rip Chart, colored markers

Future Associates: Workbook, pens or pencils, and colored markers.

PRESENTATION

 *Facilitator: to review the course, have future Associates play a baseball game called “One Strike You’re Out”.*

- Divide future Associates into two teams.
- Each group will have one hour to prepare a set of 20 questions.
- All questions must come from the window training course.
- All questions must have the page reference from the course.
- Teams may not ask two or more part questions.
- Facilitator acts as the umpire for the game.
- The decisions of the umpire are final.
- Each team will “pitch” a question to the other team. A correct answer receives a “run”. The team at “bat” continues to bat until they answer a question incorrectly.
- Each team will select a team “captain”.
- Each team will have a “batting order”. Any member of a team may answer a question, however, once a team member has answered a question they cannot answer another question until all other members of the team have answered a question. The team captain will keep track of whom has answered a question.
- When a question is “pitched” to a team, members must raise their hands if they wish to answer the question. The captain will select a member to answer the question.
- There must be no discussing of the question or answer among team members. Remember, the umpire (facilitator) may call “foul” for such an offense.
- Have each team select a name for itself.
- Facilitator-set up rip chart with the heading of the “semi-world series”. Divide the chart into two parts and label each side with the name that each team has selected.
- Umpire (facilitator) acts as the recorder of runs on the rip chart.

 *Facilitator: if possible, it is suggested to have some sort of prize for the winning team. One possible source of “prizes” could be your district retail person or postal business center.*

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First Exam

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FIRST EXAMINATION

Directions: Answer the following 43 questions. Select only one answer for each question/statement and circle the letter of your choice. After you complete this test, notify your instructor.

Obtain the latest Ratefold 123, from your instructor to compute the fees for questions 1 through 16.

1. What are the postage fees for a 10-ounce First-Class letter with certified and restricted delivery services?
 - a. \$5.86
 - b. \$7.33
 - c. \$7.21
 - d. \$7.36
2. A customer with a First-Class letter weighing 1 ounce requests registered mail service with postal insurance for \$400, return receipt. What are the postage and fees for this transaction?
 - a. \$8.99
 - b. \$6.75
 - c. \$7.08
 - d. \$10.09
3. What are the postage and fees for an 8 ounce First-Class article Containing merchandise insured for \$51.00 with a return receipt requested?
 - a. \$4.31
 - b. \$4.85
 - c. \$5.65
 - d. \$6.50

4. What is the postage for a 10-pound 3-ounce Priority parcel for an address in Zone 5, with return receipt for merchandise.
 - a. \$15.46
 - b. \$16.85
 - c. \$13.50
 - d. \$10.55
5. What is the postage for a 1-ounce Express Mail Service letter with Post Office to Addressee Service and a waiver of signature requested?
 - a. \$9.75
 - b. \$9.50
 - c. \$12.25
 - d. \$10.95
6. What are the postage and fees for a Priority Mail parcel containing merchandise, insured for \$100.00, weighing 5 pounds, going to an address In Zone 7?
 - a. \$9.55
 - b. \$8.20
 - c. \$9.00
 - d. \$10.00
7. How much should you charge a customer mailing a newspaper weighing 11 Ounces?
 - a. \$1.30
 - b. \$1.56
 - c. \$2.59
 - d. \$2.44

8. How much should you charge a customer for First Class singlepiece item weighing one ounce?
 - a. \$.30
 - b. \$.34
 - c. \$.35
 - d. \$.41
9. How much should you charge a customer for a 4-pound Package Services Machinable parcel for “Inter” BMC/ASF ZIP Codes only to Zone 4?
 - a. \$2.90
 - b. \$2.67
 - c. \$5.20
 - d. \$4.11
10. How much should you charge a customer for two machinable parcels, both going to Zone 4, if one parcel is First-Class and weighs 1 pound and the other parcel is Parcel Post and weighs 2 pounds going “Inter” BMC?
 - a. \$5.09
 - b. \$4.38
 - c. \$5.36
 - d. \$6.94
11. A customer purchases one 34-cent basic stamped envelope and one 20-cent postal card. How much should you charge the customer?
 - a. \$.52
 - b. \$.64
 - c. \$.62
 - d. \$.65

12. What is the fee for a domestic money order for \$53.00?
- a. \$.75
 - b. \$1.00
 - c. \$2.00
 - d. \$3.00
13. How much should you charge a customer who is mailing a 3-pound Package Services "Inter BMC non-machinable parcel to a Zone 8 address?
- a. \$4.65
 - b. \$6.76
 - c. \$6.05
 - d. \$6.50
14. What is the postage for a 1-ounce letter to Canada?
- a. \$.33
 - b. \$.48
 - c. \$.60
 - d. \$.58
15. What is the postage for a 1-ounce letter to Mexico?
- a. \$.32
 - b. \$.40
 - c. \$.60
 - d. \$.52
16. What is the postage for a 1-ounce letter to Great Britain?
- a. \$.55
 - b. \$.60
 - c. \$.80
 - d. \$1.05

17. Which of the following is the correct way to count change from a five dollar bill when the customer owes you \$1.25?
- a. \$One twenty-five, one fifty, two dollars, three, four and five dollars
 - b. \$One twenty-five from five dollars is \$3.75 and that's your change
 - c. \$Three dollars and seventy-five cents is your change due, so here it is
 - d. \$One twenty-five, two dollars, three, four and five dollars
18. Domestic Indemnity claims for insured mail must be filed:
- a. within 1 year from the date the item was mailed.
 - b. within 6 months from the date the item was mailed.
 - c. after 1 year
 - d. after 6 months
19. To determine the size of an article for Domestic Mail you should add the measurements for:
- a. length
 - b. length and $\frac{1}{2}$ -girth
 - c. girth
 - d. length and girth
20. Which of the following classes of mail is closed against postal inspection?
- a. First-Class mail
 - b. Periodical
 - c. Package Services
 - d. International Mail

21. The Postal Service is under pressure from _____ who would like a piece of the multibillion dollar mail business.
- a. Privatizers
 - b. Department of Transportation
 - c. SHL Corporation
 - d. None of the above
22. The most visible area of competition facing the Postal Service is in the delivery of:
- a. Standard Mail
 - b. Overnight delivery and parcel post
 - c. First-Class letters
 - d. Periodicals
23. Which of the following services is not available with Express Mail Service?
- a. Return receipt service
 - b. Registered mail service
 - c. COD mail service
 - d. Waiver of signature
24. Which of the following items cannot be used as postage for an Express Mail article?
- a. Adhesive stamps
 - b. PVI labels
 - c. Express Mail corporate account number
 - d. Pre-canceled stamps
25. Domestic registered mail must be prepaid at which of the following rates?
- a. First-Class or Priority Mail
 - b. Periodicals
 - c. Express Mail
 - d. Package Services

26. Domestic mail is acceptable for registered mail service if enclosed in which of the following containers?
 - a. Any container that is not at least 5 inches long and 3-1/2 inches high
 - b. A self-sealing envelope
 - c. A business reply envelope
 - d. A #10 stamped envelope
27. Return receipt service is available for which of the following services?
 - a. Express Mail Service
 - b. First-Class
 - c. Periodicals
 - d. Business Reply Mail
28. Special handling service is available for which of the classes of mail?
 - a. First Class Mail
 - b. Priority Mail
 - c. Package Services
 - d. All of the above
29. The Postal Bulletin is published:
 - a. monthly
 - b. weekly
 - c. annually
 - d. bi-weekly
30. Which of the following manuals contain rules, regulations and instructions regarding domestic postal services and classes and types of mail?
 - a. International Mail Manual
 - b. Postal Operations Manual
 - c. Domestic Mail Manual
 - d. Administrative Support Manual

31. When you examine an article for mailing, you should:
 - a. check outer wrapping
 - b. press lightly on the container
 - c. check addressing
 - d. all of the above
32. Restricted delivery is available for which of the following types of mail?
 - a. Periodicals
 - b. Registered Mail
 - c. Standard Mail
 - d. Express Mail
33. Which of the following is a feature of return receipt service?
 - a. Evidence of delivery
 - b. Evidence of insurance
 - c. Evidence of registered service
 - d. Evidence of mailing
34. Return receipt for merchandise service is available for mail sent by:
 - a. Priority Mail
 - b. Periodicals
 - c. Express Mail
 - d. Registered Mail
35. A Sales and Services Associate's overage can be applied:
 - a. to offset any shortage
 - b. to a shortage incurred by the same clerk
 - c. to offset a related shortage
 - d. to pay operating expenses of the post office

36. A Sales and Services Associates would probably be held accountable for the following actions
- a. Postal cards stolen from a locked cabinet
 - b. Stamps taken from the counter while the clerk's back was turned
 - c. Theft from the station's main vault
 - d. Cash drawer forced open while at lunch
37. Postal funds must always be stored in:
- a. a safe in the postmaster's office
 - b. banks, unless fireproof safes are available
 - c. burglar-resistant chests in walk-in vaults
 - d. equipment providing maximum security at the office
38. The Postal Service assists other government agencies performing which of the following actions?
- a. Selling Migratory Bird Stamps
 - b. Providing Selective Service Applications
 - c. Accepting Passport applications
 - d. All of the above
39. Which of the following would be a feature and benefit of COD Service?
- a. Insurance for loss, damage, and failure to receive payment
 - b. Can be sent by 1st class/Priority, Package Services, or Express Mail
 - c. Customers can purchase Special Handling Service
 - d. All of the above
40. Recorded Delivery Service is available for which types of mail services?
- a. International Parcel Post
 - b. Global Priority
 - c. International Letter-Post
 - d. All of the above

FIRST EXAM ANSWER SHEET

- | | | | |
|-----|---|-----|---|
| 1. | B | 21. | A |
| 2. | D | 22. | B |
| 3. | A | 23. | B |
| 4. | C | 24. | D |
| 5. | C | 25. | A |
| 6. | A | 26. | D |
| 7. | D | 27. | A |
| 8. | B | 28. | D |
| 9. | C | 29. | D |
| 10. | D | 30. | C |
| 11. | B | 31. | D |
| 12. | A | 32. | B |
| 13. | B | 33. | A |
| 14. | C | 34. | A |
| 15. | C | 35. | C |
| 16. | A | 36. | B |
| 17. | A | 37. | D |
| 18. | C | 38. | D |
| 19. | D | 39. | D |
| 20. | A | 40. | C |

Overheads

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Exhibit 1



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Exhibit 2

(Draft) **Position Description**

STD Position Description

U.S. Postal Service

Sales and Services Associate, PS-05

Functional Purpose

Performs a variety of sales and customer support services for products. Maintains pleasant and effective public relations with customers and others requiring a general familiarity with postal laws, regulations, and procedures commonly used.

Duties and Responsibilities

1. Performs any variety of sales and customer services at a retail window such as maintaining sufficient inventory of and selling stamps, stamped paper, other retail products and services and may use a computerized system, accepting and delivering packages and accountable mail; issuing and cashing foreign and domestic postal money orders; accepting and responding to customer claims and inquiries, and providing information to the public regarding postal regulations.
2. Provides sales and customer service support by greeting customers and explaining store layout determining special interests and referring to sales and promotional programs; offers assistance in product selection; provides special assistance; and answers customer inquiries when needed.
3. Provides product and service information to customers, including informing customers regarding special offers; suggestive selling related merchandise; promoting products based on customer needs. Provides additional information regarding product features and services.
4. Handles and processes customer purchases and returns relating to products and services and may use a point of sale system. Assists customers with transactions.
5. Maintains appearance of store by setting up, arranging, and replenishing displays and merchandise racks; ensures display and selling areas, work stations, and storage areas are presentable to customers.
6. Conducts product inventories by counting items on hand; attaches and removes security devices; accounts for items on display; and verifies and records sales floor inventory and shrinkage. Brings inventory discrepancies and shrinkage reports to the attention of the appropriate supervisory presence.
7. May verify presort and bulk mailings of all classifications, computing and maintaining on a current basis mailer's credit balances.
8. Checks and sets post office stamp-vending machines and postage meters.
9. Rents post office boxes, receives rental payments, conducts reference checks, and completes related forms.
10. In addition, may assign and clear accountable items and distribute mail as required; and other duties as assigned.

SUPERVISION

Supervisor, Customer Services, or other supervisor/designee

SELECTION METHOD

BARGAINING UNIT

Clerk

Facilitator's Guide

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Exhibit 3

Domestic Mail Manual

- Contains the regulations of the Postal Service governing its domestic mail services
- Includes the rates for postage and restrictions on its use, description of the classes of mail and special services and conditions governing their use.
- Requirements for wrapping and mailing
- Explanations of collection and delivery services.
- General provisions concerning the use of postal services and facilities.

Note: You will use this manual quite frequently in the performance of your duties as a Sales & Service Associate

Definition of Manuals

Postal Operations Manual

- Sets forth the policies and procedures governing the operational functions of field organizations of the USPS
- Topics include retail services, handling complaints, customer services, collection services, mail processing, transportation, delivery services, and fleet management

International Mail Manual

- Sets forth the conditions and procedures for the preparation and treatment of mail sent from the States to other countries and the treatment of mail received from other countries
- Its counterpart is the **DMM**
- Cross-reference to the **DMM** are provided wherever domestic conditions and procedures apply to the preparation or treatment of international mail

Employee and Labor Relations Manual

- Sets forth the personnel policies and regulations governing employment with the USPS.
- Topics include organization management, job evaluation, employment and placement, pay administration, employee benefits, employee relations, training, safety and health, and labor relations

Administrative Support Manual

- Contains policies and procedures for administrative and support functions of the USPS
- Topics include the postal organization, inspection service, communications, records and release of information, government relations, printing, facilities and equipment management, maintenance, marketing, procurement, and supply management, and computer-based information systems.

Financial Management Manual

- Provides the financial policies, programs, and plans for the USPS.
- Used with Handbook F-1, *Post Office Accounting Procedures*
- F-1 is the basic reference you will use for your financial responsibilities and procedures.

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Exhibit 4

Standard Acceptance Procedures

- Addressing
- Outside packaging requirements
- Sealing of package (no scotch/masking)
- Ask customer if contents are liquid, fragile, perishable or potentially hazardous
 - not detailed description
 - item must be marked or endorsed properly
- Shake container gently, determine if cushioned properly
- Press lightly on container, determine if item can withstand transportation and articles being placed on top.

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Exhibit 5

 **Hazardous Materials Recognition**

Declared HAZMAT-LABELS
Department Of Transportation Warning Labels

Not Acceptable:

- 1. Explosive (Orange diamond)
- 2. Poison Gas (White diamond with skull and crossbones)
- 3. Flammable Liquid (Red diamond)
- 4. Spontaneously Combustible (Red diamond)
- 5.1. Oxidizer (Yellow diamond)
- 7. Radioactive II (Yellow diamond)
- 8. Corrosive (White diamond with black border)

Potentially Acceptable:

- 6. Infectious Substance (White diamond with biohazard symbol)
- 9. Miscellaneous (White diamond with black border)

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Exhibit 5A



The slide features a dark blue background with a white United States Postal Service logo in the top left corner. The title "Hazardous Materials Recognition" is displayed in white text, followed by the subtitle "Declared HAZMAT-LABELS". Two rectangular labels are shown side-by-side. The left label is black with white text, reading "CONSUMER COMMODITY" at the top, "ORM-D" in large bold letters in the center, and "SURFACE ONLY" at the bottom. The right label is white with black text, reading "CONSUMER COMMODITY" at the top, "ORM-D-AIR" in large bold letters in the center, and "EAST MADE IN HAWAII, OREGON, U.S.A. THE BT (BOMB) CORPORATION, GAINESVILLE, FL 32609" in small text at the bottom.

 **Hazardous Materials Recognition**
Declared HAZMAT-LABELS

CONSUMER COMMODITY
ORM-D
SURFACE ONLY

CONSUMER COMMODITY
ORM-D-AIR
EAST MADE IN HAWAII, OREGON, U.S.A. THE BT (BOMB) CORPORATION, GAINESVILLE, FL 32609

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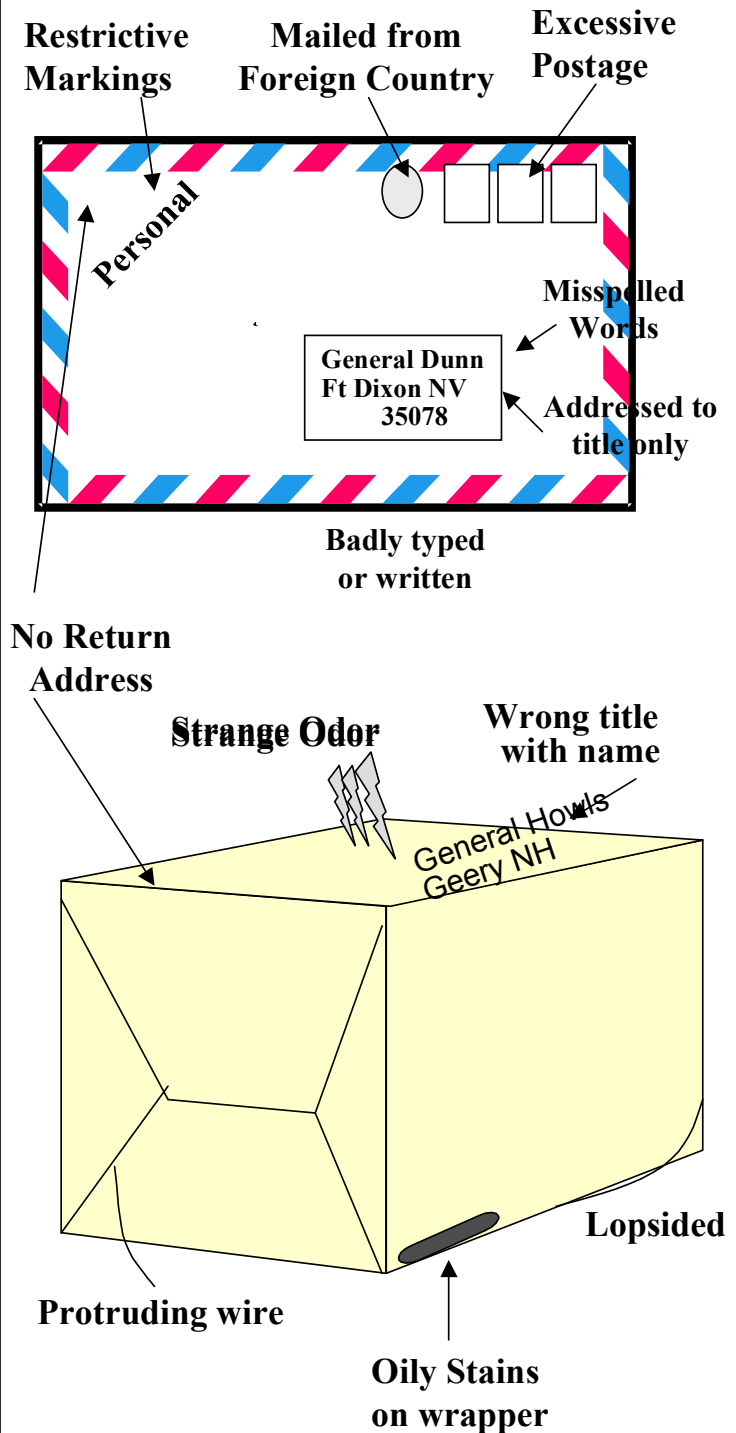
Exhibit 6

Letter & Package BOMB INDICATORS

- ☛ Do not open
- ☛ Treat it as suspect
- ☛ Isolate it
- ☛ Call the Police
- ☛ Call your Postal Inspector



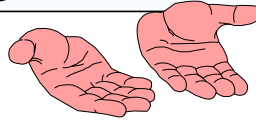
INDICATORS



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Exhibit 7

Safe Handling of Parcels Suspected of Containing Hazardous Materials



Parcels suspected of containing hazardous chemicals or infectious substances should be handled carefully. If you suspect that a parcel may contain such materials you should follow appropriate guidelines.

Guidelines for Handling Parcels Suspected Containing Hazardous Materials

-  Do not throw, drop, or slide articles that are believed to contain hazardous or infectious materials.
-  Transport parcels containing hazardous materials in reliable carts.
-  Store parcels containing hazardous materials in an isolate area away from work traffic flows.
-  Separate and store radioactive materials at least 10 feet apart.
-  Separate corrosive, flammable solids, oxidizers, and organic peroxides during transport and storage.
-  Place parcels containing hazardous materials on the top center of a cart and secure them before moving the cart.
-  Never leave hazardous materials unattended.

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Exhibit 8

Weights

	Minimum	Maximum
Express Mail	none	70 lbs
1st Class	none	13 oz
Priority	none	70 lbs
Parcel Post	none	70 lbs
Bound Printed Matter	none	15 lbs
Library Mail	none	70 lbs
Media Mail	none	70 lbs

MAXIMUM weight acceptable in domestic mail is 70 lbs. The length + girth is 108”.

Exception is Parcel Post can be 130” length + girth, *pay oversize rate.*

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Exhibit 9

Surcharges

1st class non-standard surcharge is added only if article is 1 oz or less

- **Article exceeds 6 1/8" x 11 1/2"**
- **Article is over 1/4" thick**
- **Article is out of ratio**
(1.3 to 2.5 or doesn't fall in shaded area on template)

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Exhibit 9A

Surcharges

BALLOON

Priority - Parcel Post

- ❑ **Parcels less than 15 lbs. That measure more than 84" (not over 108" combined length + girth) *charged applicable rate for 15 lbs. Parcel***

OVERSIZE - Parcel Post

- ❑ **Parcels measure 108" up to 130" combined length + girth) *pay the oversized rate, regardless of actual weight of the piece***

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Exhibit 9B

Surcharges

Package Services -

**Parcel Post is subject to a non-machinable surcharge in both INTER and INTRA rates.
(refer to rate chart)**

- Exceeds 34" x 17" x 17" in length, height or width
- Is Perishable
- Is wood or metal box
- Is tree or shrub
- Is metal banded
- Contains over 24 oz. liquid glass container, gallon or more liquid metal or plastic container

*Exception to this surcharge is if Special Handling is added you will subtract the non-machinable surcharge.

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Exhibit 10

Debit/Credit Acceptance



In addition to accepting cash and checks for payment, the Postal Service now accepts Debit Cards and Credit Cards.

Debit Cards can be used to pay for all postal products and services except passport fees.

Credit/Charge Cards can be used for all postal products except:

- Passport fees
- Money orders
- Collect-On-Delivery (COD) Collections
- Employee suspense items
- Bulk mailings
- Meters Settings
- Trust account deposits (including, but not limited to, pre-canceled stamps, permit imprints, periodicals, Business Reply Mail, and Express Mail Corporate accounts.

When a card is presented for payment:

1. Examine the credit card to make sure that it is currently valid and not expired or valid at a future date. Note that many debit cards do not have expiration dates.
2. Check that credit cards bear a signature. If the card is unsigned, ask for a picture ID and allow the customer to sign the card in your presence. If the customer refuses to sign the card, ask the customer for another form of payment.
3. Retain the card until the transaction is completed.

No unsigned credit cards are to be accepted. NO exceptions

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Exhibit 11

Credit/Charge Card Sale



- 1. Slide the card. If card has been swiped three times and the terminal does not recognize the cards, a manual entry is to be made by keying in the account number and pressing (ENTER). Then enter the expiration date of the card and press (ENTER).**
- 2. Key in the last four digits of the card number, Press (ENTER).**
- 3. When card # is displayed, Press (ENTER).**
- 4. Key in your 2-digit Clerk ID, Press (ENTER).**
- 5. Key in your 4-digit Password, Press (ENTER).**
- 6. Key in the total amount of sale, Press (ENTER).**
- 7. Terminal prompt will display - “dialing, transmitting” - and Receipt will print.**
- 8. Press (CLEAR).**

If transaction is not approved, return the card to the customer and politely request another form of payment. If customer inquired why the transaction was declined, simply tell them to contact the issuing bank. Have the customer sign the top copy of the self-duplicating receipt. Give the copy to the customer and turn in the original with your 1412. Signature on the printed receipt for Visa and MasterCard must match the signature on the back of the credit card. Signatures on the printed receipt for American Express and Discover must match the signature on the back of the card and the embossed name on the front of the card. If they do not match you cannot accept the cards.

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Exhibit 12

Debit Card Sale



- 1. Press (6), Debit Sale**
- 2. Slide the card**
- 3. Key in your 2-digit Clerk ID, Press (ENTER).**
- 4. Key in your 4-digit Password, Press (ENTER).**
- 5. Enter amount of sale (ENTER)**
- 6. Enter cash back amount Press (ENTER).**
- 7. Hand customer the PIN Key Pad so they may enter their PIN #. A receipt will print.**
- 8. Press (CLEAR)**

Reprinting A Transaction

Your terminal is capable of reprinting only the last transaction conducted. If you have pressed any function key except the clear key in between the transaction and the attempt to reprint, you will not be able to reprint the transaction. To do this:

- 1. Press (Func/Enter) Key**
- 2. Press (2) Key**
- 3. Printing....**

A reprinted sales receipt will look identical to a normal sales receipt except the word REPRINT will appear at the top of the receipt (in red ink).

NOTE: You may use the REPRINT function for both Debit and Credit transactions.

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Exhibit 13

Think Retail / Increase Sales



- **It IS “Your” JOB**
- **You are a sales person for the Postal Service**

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Exhibit 14

**WE DON'T WANT YOU
TO BE ROBOTS!**

**HAVE FUN AND
INTERJECT YOUR
PERSONALITY!**



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Exhibit 15

Parts To A Successful Transaction

- **How soon do you need this article to arrive?**
- **How much insurance do you need?**
- **Do you need proof of mailing or delivery?**
- **Would you like something else while you are here today?**
- **Will you be using your credit or debit card?**
- **Thank you for using the Postal Service !!**

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Exhibit 16

How Soon Do You Need This Article To Arrive?



(Sample prompt questions)

- **How quickly would you like your item to get there?**
- **PRIORITY MAIL is a 2-3 day delivery, do you need your package to arrive sooner?**

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Exhibit 17



INSURANCE

(Sample prompt questions)

- **What is the replacement value?**
- **Would you care for insurance?**
- **Do you need any insurance with this item?**
- **Would you like to purchase insurance?**

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Exhibit 18



PROOF OF DELIVERY

(Sample prompt questions)

- **Do you need proof of mailing or delivery?**
- **Do you need to know when this article arrived?**
- **Do you need confirmation when this article was delivered?**

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Exhibit 19



Question Customer...

“Are the contents”

- Liquid?
- Perishable?
- Fragile?
- Potentially hazardous?

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Exhibit 20

EDUCATE THE CUSTOMER



Keep in mind...

Customer wants value, not necessarily the lowest price

- **Cost of Service**
- **Time standards**
- **Service performance**
- **Special services**

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Exhibit 21



DEBIT/CREDIT CARD

(Sample prompt questions)

- **Will you be paying with your ATM or Credit card?**
- **Will this be Cash or Credit?**
- **For you convenience, the Postal Service now accepts Credit Cards.**
- **Can I put this on your Credit Card for you?**
- **Would you like to use your debit card for some cash back?**

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Exhibit 22



ADDITIONAL ITEM

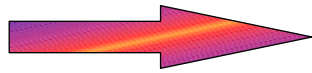
(Sample prompt questions)

- **Would you like a book of stamps while you are here today?**
- **How is your supply of stamps?**
- **Can I show you our new stamps?**
- **Are you interested in seeing our new stamps?**
- **How about a sheet of stamps today?**

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Exhibit 23

**MORE VALUE
SELLING IDEAS**



- **Book of Stamps**
- **Phone Cards**
- **Merchandise**
- **Stamped Envelopes**
- **Postcards**
- **PRIORITY MAIL
Envelopes**
- **Packaging Products**

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Exhibit 24

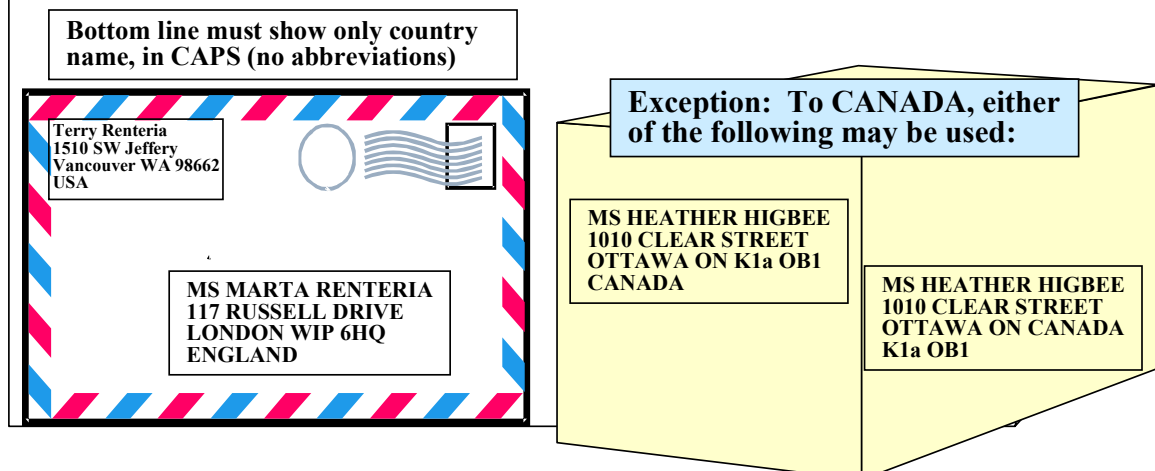


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Exhibit 25

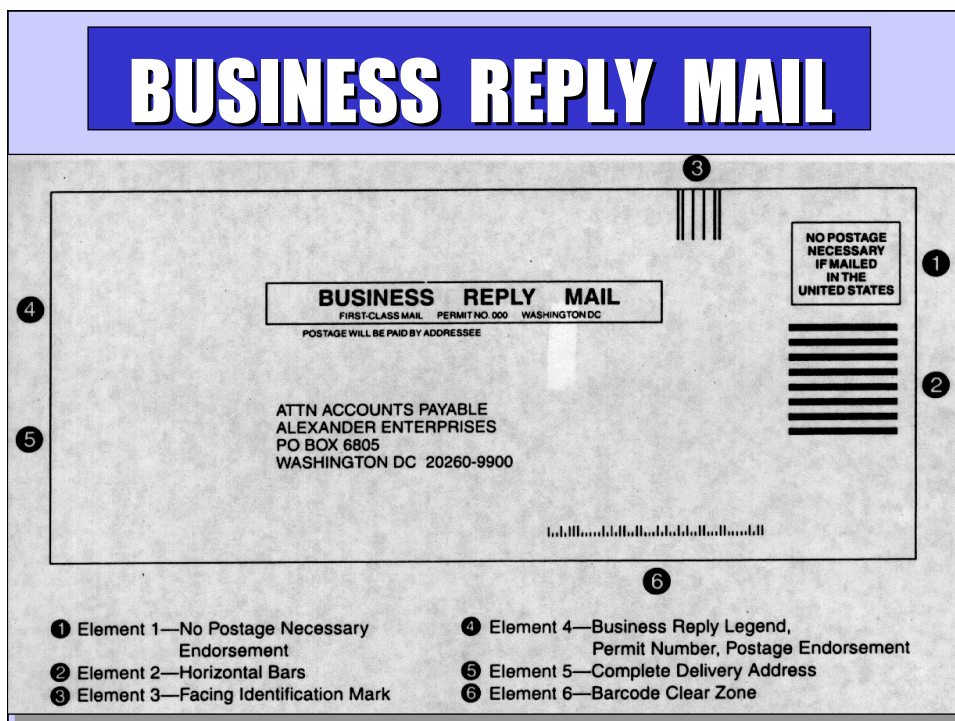
International Addressing

- Entire right half of address side of envelope
- Printed in ink or typewritten (no pencil)
- Legible Roman letters & Arabic numbers
- Addresses in Russian Greek Hebrew, Cyrillic, Japanese or Chinese characters must bear an interline translation in English translation is not known, the foreign language words must be spelled in Roman character (print or script)
- Not addressed “in care of”, Boxholder or Householder
- Exception form of address: addressee’s name or *Occupant*
Example: MS MARTA RENTERIA or OCCUPANT



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Exhibit 26



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Exhibit 27

P.S. Form 3887		Firm Mailing Book													
Name and Address of Sender <div style="text-align: right; font-weight: bold;">FEDC</div> <div style="text-align: right;">PO BOX 2089</div> <div style="text-align: right;">PORTLAND OR 97208-2089</div>		Check type of mail: <input type="checkbox"/> Express <input type="checkbox"/> Return Receipt (RR) for Merchandise <input type="checkbox"/> Registered <input checked="" type="checkbox"/> Certified <input type="checkbox"/> Insured <input type="checkbox"/> Int'l Rec. Del. <input type="checkbox"/> COD <input type="checkbox"/> Del. Confirmation (DC)				If Registered Mail check below: <input checked="" type="checkbox"/> Insured <input type="checkbox"/> Not Insured				Affix stamp here if issued as certificate of mailing, or for additional copies of this bill. <div style="text-align: right;">Postmark and Date of Receipt</div>					
Line	Article Number	Addressee Name, Street, and PO Address	Postage	Fee	Handling Charge	Actual Value (If Reg.)	Insured Value	Due Sender If COD	RR Fee	DC Fee	SC Fee	SH Fee	SD Fee	RD Fee	Remarks
1	Z 555 444 333	JAMES R. JOHNSON 756 N. DAVIS ST. CHICAGO, IL 60652													
2	Z 444 555 222	JOHN S. SMITH 8443 S. W. 64TH AVE. COVINA, CA 91709													
3	Z 111 444 666	DAVID P. EVANS 6601 CHURCH ST. TACOMA, WA 98151													
4	Z 777 111 333	SANDRA K. DOUGLAS 1311 S ST. SW LOS ANGELES, CA 90013													
5	Z 222 111 555	SARAH B. ROBERTS 241 E. 42ND AVE DENVER, CO 80202													
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
Total Number of Pieces Listed by Sender <div style="font-size: 1.5em; font-weight: bold;">FIVE</div>		Total Number of Pieces Received at Post Office	Postmaster, Per (Name of receiving employee)			The full declaration of value is required on all domestic and international registered mail. The maximum indemnity payable for the reconstruction of nonnegotiable documents under Express Mail document reconstruction insurance is \$50,000 per piece subject to a limit of \$500,000 per occurrence. The maximum indemnity payable on Express Mail merchandise insurance is \$500. The maximum indemnity payable is \$25,000 for registered mail, sent with optional postal insurance. See Domestic Mail Manual R900, S913, and S921 for limitations of coverage on insured and COD mail. See International Mail Manual for limitations of coverage on international mail. Special handling charges apply only to Standard Mail (A) and Standard Mail (B) parcels.									
PS Form 3877, April 1999 Complete by Typewriter, Ink, or Ball Point Pen															

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Exhibit 28

COMPETITION

COMPETITORS

Overnight Delivery

- * Federal Express
- * Airborne
- * DHL Corporation
- * Emery & Purolator Courier Corp
- * United Parcel Service

2-day delivery

- * Federal Express
- * United Parcel Service

Packages/Parcel Post

- * United Parcel Service
- * Roadway Express International Mail

International Mail

- * Federal Express
- * United Parcel Service
- * DHL Corporation
- * TNT

USPS

USPS developed Express Mail. We currently have 6% of the market.

Priority Mail

Parcel Post

International Express
Global Priority
Postal Union Mail
Air/Surface Parcel Post
*PC Postage

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Exhibit 29

Box Rental Due Date Chart		
IF RENTED DURING PERIOD From-To	SIX MONTHS DUE DATE	TWELVE MONTHS DUE DATE
JAN 1 thru 15	JUN 30	DEC 31
JAN 16 thru 31	JUL 31	JAN 31
FEB 1 thru 15	JUL 31	JAN 31
FEB 16 thru 28	AUG 31	FEB 28
MAR 1 thru 15	AUG 31	FEB 28
MAR 16 thru 31	SEP 30	MAR 31
APR 1 thru 15	SEP 30	MAR 31
APR 16 thru 30	OCT 30	APR 30
MAY 1 thru 15	OCT 31	APR 30
MAY 16 thru 31	NOV 30	MAY 31
JUN 1 thru 15	NOV 30	MAY 31
JUN 16 thru 30	DEC 31	JUN 30
JUL 1 thru 15	DEC 31	JUN 30
JUL 16 thru 31	JAN 31	JUL 31
AUG 1 thru 15	JAN 31	JUL 31
AUG 16 thru 31	FEB 28	AUG 31
SEP 1 thru 15	FEB 28	AUG 31
SEP 16 thru 30	MAR 31	SEP 30
OCT 1 thru 15	MAR 31	SEP 30
OCT 16 thru 31	APR 30	OCT 31
NOV 1 thru 15	APR 30	OCT 31
NOV 16 thru 30	MAY 31	NOV 30
DEC 1 thru 15	MAY 31	NOV 30
DEC 16 thru 31	JUN 30	DEC 31

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Appendix

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Appendix - Optional Role Plays GDS Products Module

Terminal Objective:

Upon completion of this module participants will be able to provide and sell customers with the best international product for their needs.

Enabling Objectives:

Upon completion of this module participants will be able to:

- Identify and explain international mailing products
- Effectively sell the best product to meet customer's needs

Time Allocated for this Module: 1 Hr.

Instructional Methods: lecture, mock lobby (simulation), and discussion

Summary of Instructional Plan:

Facilitator introduces the module by giving a brief description of the thought and action process a Sales Associates/Window Clerk goes through when a customer arrives at the window counter with an international mailing need.

Materials Required:

Instructor: Role-play supervisor's guide, rip chart, colored markers, process flow chart

Future Associates: Role-play instruction sheet, workbook, pens or pencils

PRESENTATION

1. Facilitator will review the GDS product line by giving key value benefits to each product.
2. Facilitator will review the clerk process flow and thought process to determine the best product for the international mailer.
3. Facilitator will answer questions regarding the review.

SIMULATION RULES

You are to meet with your partner, who will play the role of the window clerk or customer as determined by what is written on your instructions sheet. You may not show your information sheet or any part of it to your partner. Nor may you consult with or discuss this exercise with others before or during the transaction. Sometimes other people are not finished and discussion before time is called would spoil the exercise. Just pretend the exercise is real and do it as you would a real transaction.

You should make use of the information contained here to help you successfully conclude the transaction. You may need to "elaborate" on the information to keep the conversation going.

MOCK LOBBY (Simulation)

1. Facilitator will break group into pairs
2. Facilitator will have each participant in a pair number themselves a "One" or a "Two"
3. Facilitator will announce simulation rules as stated above.
4. Facilitator will hand out Instruction Sheet 1 -A to half of the trainees labeled "One"; hand out the other half of the "One" trainees Instruction Sheet 1 - B
5. Facilitator will hand out Instruction Sheet 2 - C to half of the trainees labeled "Two"; hand out the other "Two" trainees Instruction Sheet 2 - D
6. Facilitator will allow 1 minute for trainees to read over their role play instructions. No questions or communication with any participant is allowed.
7. Facilitator will then begin the exercise and allow 5 minutes for simulation to run.
8. Facilitator will moderate a discussion regarding the trainees' outcomes of their role- plays and review the suggested outcome of the simulation.

FACILITATOR REVIEW

1. Facilitator will ask the outcome for each group and any insights they may have from the simulation.
2. Facilitator will then go through the suggested outcome for the simulation.
3. Facilitator will moderate a discussion, if necessary.

SUGGESTED OUTCOME OF EMS SIMULATION (instruction Sheets A and B)

Many of our customers don't know about our full range of international services. Understanding the key value differences between international services is essential to providing the best service to meet customers' needs.

After asking a series of questions, the window clerk should have determined that Express Mail International Service (EMS) should have been the best product to offer the customer for the following reasons:

- Time: EMS offers the fastest service to Singapore.
- Confirmation: All EMS mail needs to be signed for upon delivery; limited track and trace through Internet site (www.usps.com) and 1-800-222-1811.

SUGGESTED OUTCOME OF GPM SIMULATION (Instruction Sheets C and D)

After asking a series of questions, the window clerk should have determined that Global Priority Mail (GPM) should have been the best product to offer the customer for the following reasons:

- Special Handling: Distinctive packaging and priority handling offered to discriminate against regular mail
- Cost: Priority Mail is competitively priced and lower than Express Mail

INSTRUCTION SHEET 1 -A ROLE OF THE CUSTOMER

I. FACTS OF THE CASE: You need to mail three travel brochures to your client in Singapore so they will arrive as soon as possible.

Cost is a minor consideration, but you would like some confirmation that your client will receive the travel brochures, if possible.

Remember that you are the customer and you do not know a lot about the international product lines.

INSTRUCTION SHEET 2 - B

ROLE OF THE SALES ASSOCIATES/WINDOW CLERK

I. FACTS OF THE CASE: You are working at a retail counter window and a customer comes to you with a package he/she needs to send internationally.

Use the information you have just gathered about the Global Delivery Services product benefits to offer the best product for this customer.

INSTRUCTION SHEET 1 - C

ROLE OF THE CUSTOMER

I. FACTS OF THE CASE: You need to mail a picture and its 5 x 7 picture frame to your sister in Sydney, Australia. She does not urgently need the picture and frame, but would like it in one to two weeks. Your sister recommends that you send the box through a service that provides some special handling since she has not been receiving a lot of her regular mail lately.

You would like to save some money too, if possible.

Remember that you are the customer and you do not know a lot about the international product lines.

INSTRUCTION SHEET 2 - D

ROLE OF THE SALES ASSOCIATES/WINDOW CLERK

I. FACTS OF THE CASE: You are working at a retail counter window and a customer comes to you with a package he/she needs to send internationally.

Use the information you have just gathered about the Global Delivery Services product benefits to offer the best product for this customer.

Retail Customized Materials for Structured On-the-Job Training Course #23501- 00 or #23501- 01, Facilitator's Guide

The Retail Sales and Services Associates Training program requires successful completion of the course #23501 -00 or #23501 -01 (Structured On-the-Job Training.) The materials in this appendix are customized to meet the retail requirements for structured on-the-job training. These materials replace the generic structured on-the-job training course materials for Module 4 of the Facilitator's Guide. Similarly, the materials in Appendix B replace the generic course materials for Module 4 of the Participant's Guide.

1. Training Worksheets are used in lieu of the SOJT Lesson Plan sheets for Retail Sales and Services Associates Training.
2. **Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail Sales and Services Associates Training. This module replaces Module 4 in the generic structured on-the-job training course #23501 -00 or #23501 -01.**

General Mailability Requirements

Safety & Service Talks
USPS Hazardous Materials Working Group
Revised March 27, 2000

Topic: General Mailability Requirements
For: Acceptance personnel (including contractors)

Generally, the only hazardous materials permitted in the mail are those that qualify as consumer commodities. Consumer commodities are also referred to by the term “ORM-D”. To accept these types of mailing, they must comply with the postal regulations, section C023 of the Domestic Mail Manual, for the appropriate hazard class. A Consumer commodity is a hazardous material that is packaged and distributed in a quantity and form intended or suitable for retail sale and designated for consumption by individuals for the personal care or household use. Consumer commodities present minimal danger to the employees, civil aviation, and the traveling public when accepted and handled properly. Restrictions vary depending on whether a mailpiece will be transported by air or surface, and to a domestic or international destination. In the international mailstream, hazardous materials are referred to as “dangerous goods” and acceptance is even *more* restricted than for domestic mailing.

For domestic mailings, the Domestic Mail Manual is the primary reference for hazardous materials mailability requirements. Publication 52, Acceptance of Hazardous, Restricted, or Perishable Articles, contains additional information that supplements the rules in the DMM. Poster 76, Some Things Were Never Meant to Be Mailed, and Notice 107, Hazardous Materials! are useful as customer prompts and visual reminders of items that are generally not mailable, including explosives, flammables, and toxic gases.

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The marking and packaging requirements for mailable hazardous materials are found in DMM C023 and Publication 52. Generally, proper packaging means using strong containers, sufficient cushioning and absorbent material, secure closures and adequate package reinforcement.

Most package failures are caused by inadequate closure or reinforcement. For instance, a screw-top closure must require a minimum of one-and-one-half turns to close and should be securely reinforced with plastic tape. A friction closure, such as a paint can lid, cannot be accepted unless it has reinforcing clips or rings. Cushioning must be sufficient to protect against breakage and absorb the contents, in case of leakage during transit. Some items must be packaged in secondary containers, as further protection against leaks. The weight of the contents of a parcel must not exceed the rating of the container, and the container should be reinforced with pressure sensitive filament tape or another type of acceptable packaging tape.

Both the delivery and return address must appear on every parcel, in letters large enough to be legible at arm's length. The address side of parcels containing hazardous materials must be clearly labeled as required in DMM C023 for the applicable hazard class.

Customers who want to re-use a box that previously contained HAZMAT as a mailing container must completely obliterate all old markings on the box, prior to mailing. For example, if a box marked "BLEACH" or "ALCOHOL" is used for mailing and those words have not been completely eradicated, the package must be treated as if it contains the indicated hazardous material, which may cause it to be rejected or returned to sender. This may sound extreme, until you realize that anyone who later

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sorts, transports or delivers the package can't otherwise be certain that it *doesn't* contain what its markings suggest.

The United States Department of Transportation (DOT) requires the display of diamond-shaped warning symbols on certain types and quantities of hazardous materials. These look somewhat like the diamond-shaped signs on tractor-trailers hauling gas and chemicals. Understanding some special requirements behind the use of these symbols can help you identify nonmailable HAZMAT.

Now, let's put those diamond symbols in the context of postal mailability. If a mailable substance like a blood or urine sample is also known or reasonably believed to be infectious, the mailer must ensure it bears the DOT's diamond-shaped label for "Infectious Substance, Class 6, Division 6.2". However, with the exception of dry ice bearing a Class 9 label, material bearing any other diamond-shaped symbol is prohibited from the mailstream.

Therefore, if you see any mailpiece bearing a DOT diamond-shaped label other than "Infectious Substance, Class 6, Division 6.2" or properly prepared and accepted dry ice with a Class 9 label, it is automatically nonmailable and should not be accepted from a customer. Publication 52 and EL-812 have color representations of the diamond-shaped labels.

If mail bearing some other DOT warning label is discovered in the mailstream, notify your supervisor or postmaster immediately. The item should be temporarily culled out and segregated to a designated area and reported to the Inspection Service for appropriate handling, in accordance with Section 139.117 of the Postal Operations Manual.

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Mail bearing DOT “Infectious Substance, Class 6, Division 6.2” or “Miscellaneous Hazardous Material Class 9” labels must be dispatched as outside pieces. Other similar or like clinical specimens, biological products, and items displaying only Biohazard symbols may be placed into sacks or pouches that are properly identified with Tags 44. Only “like” HAZMAT can be commingled. Under no circumstances should mail containing HAZMAT, including Biohazard materials, be commingled in sacks, pouches or containers with non-HAZMAT mail of any other class.

HAZMAT shall be separated from other mail. Placed in a reliable steel container away from traffic flows. Do not place HAZMAT in a canvas hamper or in cardboard gaylords.

If you are uncertain as to the mailability, labeling or packaging requirements for any substance, contact your district Business Mail Entry Office, or the nearest Rates and Classification Service Center.

Spotting Potentially Hazardous Materials

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Topic: Spotting Potentially Hazardous Material
For: Acceptance personnel (including contractors)

Those of us who work with mail acceptance have one of the most important roles to play when it comes to hazardous material in the mailstream.

When packages are presented for mailing, customers should be politely asked to confirm that the contents do not include potentially nonmailable hazardous materials such as chemicals, aerosols, fireworks, and other explosives, flammable substances or similar common items. This technique reveals the reason for the inquiry (concern about nonmailable hazardous items) and is less intrusive and offensive than simply asking them to tell you what's inside. You can also refer customers to Poster 76, *Some Things Were Never Meant to be Mailed*. The poster is designed to visually suggest many categories of nonmailable items, so that customers can better understand the possible limitations. This is why Poster 76 is required to be displayed in full view of customers at all retail windows, acceptance docks and self-service locations.

In most cases, customers will be happy to declare package contents and comply with any mailing restrictions. Some, however, are sensitive to their right to privacy and may decline to respond. **Acceptance personnel cannot require a response. Also, First-Class, Priority and Express Mail are sealed against inspection and can never be opened or inspected except as permitted by Section 274 of the Administrative Support Manual.** If the customer won't say what's inside the package, the article should be accepted *unless* there is some obvious reason to reject it for lack of further information. For instance, a liquid sloshing sound or the word "BLEACH" on

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the packaging would require confirmation of the package contents and quantity, the adequacy of interior packaging, and compliance with all labeling and marking requirements, prior to acceptance.

If a customer describes an item that is not acceptable for mailing, or the package is otherwise revealed to be nonmailable, and the customer cannot provide additional information that proves its mailability, employees must refuse to accept the package and explain the reasons to the customer. If the customer disagrees with the decision, refer him or her to your postmaster or supervisor, who can then follow up with the district Business Mail Entry unit or Rates and Classification Service Center.

Be alert for package label characteristics that can be clues to potentially hazardous contents that may be found in the mail. These include: a biological hazard warning symbol; a diamond-shaped DOT Class 6, Division 6.2, "Infectious Substance" warning label; a diamond-shaped DOT Class 9 "Miscellaneous Hazardous Materials" label;



or the markings :ORM-D", ORM-D Air, "Consumer Commodity", or "LTD QTY"; or the letters "UN", followed by four numbers. You may also see supplemental information, like the words "dry ice", "cigarette lighters" or "blood sample".

Other clues are: a liquid, sloshing sound; the sound of broken glass or plastic; a stain or unusual odor; and address information that can be associated with hazardous materials, such as a chemical company, laboratory, or medical facility.

If a package believed to contain a nonmailable hazardous material is discovered in the mailstream, it should be held from dispatch and delivery. Do not open it, but instead report it to your supervisor. Package should be isolated.

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Suspected nonmailable HAZMAT must be reported to the Inspection Service immediately, in accordance with section 139.117 of the Postal Operations Manual.

If a leaking package or damaged HAZMAT article is discovered, treat the situation as a potential emergency and follow the procedures in Part VII of Handbook EL-812, Hazardous Materials and Spill Response and your facility spill and leak plan.

Handle all mailpieces declared as containing HAZMAT, or suspected of containing HAZMAT, very carefully. Never throw, drop, or slide them. Don't stack or commingle HAZMAT under other mail that could crush containers, or cause it to be overlooked during unloading or transfer. Load HAZMAT carefully into reliable equipment for transport, being careful not to balance it above the equipment sides, where it might fall. These instructions are explained in more detail in the Henderson Policy Memorandum, OS-04-21-98.

If you're ever in doubt about how to handle HAZMAT, ask your supervisor for instructions. Don't take chances that could risk the health and safety of yourself, your co-workers, or your customers.

Any questions or comments?

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All Employees and Contractors....

Be Alert for package characteristics that can indicate potentially hazardous material!

WARNING LABELS.....



OTHER MARKINGS...

ORM-D	ORM-D-AIR	Consumer Commodity
LTD QTY	UN #####	Cigarette Lighters
Blood Samples	Dry Ice	Paint
Etiologic Agent		

SOUNDS or SMELLS...

Sloshing liquid, broken glass or plastic, strange odors, unusual stains

ADDRESS INFORMATION...

Chemical companies, labs, medical facilities, shipper's declaration

Handle any package containing hazardous material very carefully.

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HAZMAT References

Postal Service Publications

Domestic Mail Manual	Module C021, Articles and Substances Generally Module C023, Hazardous Materials
Handbook EL-812	<i>Hazardous Materials and Spill Response</i>
Handbook PO-507	<i>Air Contracting Administrative Handbook</i>
International Mail Manual	Section 135, <i>Mailable Dangerous Goods</i> Section 136, <i>Nonmailable Dangerous Goods</i>
MI EL-810-96-1	<i>Response to Hazardous Materials Releases</i>
Notice 107 & 107-S	<i>Hazardous Materials!</i>
Postal Bulletins	# 21962, January 1, 1998 (summary of resources) # 21969, April 9, 1998 (DMM Revision) # 21970, April 23, 1998 (DMM Revision) # 21972, May 21, 1998 (fireworks alert) Add in all 1999-2000 Bulletins
Poster 76	<i>Some Things Were Never Meant to be Mailed</i>
OS-04-21-98	Policy Memorandum, Hazardous Materials & Dangerous Goods in the Mail
Postal Operations Manual	Section 137.412, <i>Nonmailable Matter and Hazardous Materials</i> Section 139, <i>Nonmailable Matter - Articles and Substances: Special Mailing Rules</i>
Publication 52	<i>Acceptance of Hazardous, Restricted Or Perishable Matter</i>

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Refernces (cont'd)

For techincal assistance with mailability determinations, contact the appropriate Rates and Classification Service Center (RCSC), below:

Allegheny, Mid-Atlantic and Capital Metro Areas:

NOTHERN VIRGINIA (NOVA) RCSC
5904 RICHMOND HIGHWAY, SUITE 500
ALEXANDRIA, VA 22303-2736
703-329-3660

New York Metro and Northeast Areas:

NEW YORK RCSC
1250 BROADWAY 14th FLOOR
NEW YORK NY 10095-9599
212-613-8676

Great Lakes and Midwest Areas:

CHICAGO RCSC
3900 GABRIELLE LANE, ROOM 111
FOX VALLEY IL 60597-9599
630-978-4329

Southeast and Southwest Areas:

MEMPHIS RCSC
1 NORTH FRONT STREET
MEMPHIS TN 38165-9599
901-576-2212

Pacific and Western Areas:

SAN FRANCISCO RCSC
33 NEW MONTGOMERY STREET SUITE 1690
SAN FRANCISCO CA 94105-4514
415-247-7200

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Refernces (cont'd)

Other Publications

Hazardous Materials-Emergency Response Guidebook

Available from:

MATERIALS TRANSPORTATION BUREAU
RESEARCH AND SPECIAL PROGRAMS ADMINISTRATION
U.S. DEPARTMENT OF TRANSPORTATION
WASHINGTON DC 20590-0001

Code of Federal Regulations, Title 49, *Transportation*, Parts 100 to 185

Available from:

SUPERINTENDENT OF DOCUMENTS
U.S. GOVERNMENT PRINTING OFFICE
WASHINGTON DC 20402-0001

Air Transport Restricted Articles, Circular No. 6-D

AIRLINE TARIFF PUBLISHING CO.
DULLES INTERNATIONAL AIRPORT
P.O. BOX 17415
WASHINGTON DC 20041-0415

Techinal Instructions for the Safe Transport of Dangerous Goods by Air

Available from:

DOCUMENT SALES UNIT
INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO)
1000 SHERBROOKE STREET WEST SUITE 400
MONTREAL QUEBEC
CANADA H3A2R2