# Contents

# Topic 1
# Receive and distribute incoming mail

Businesses receive mail in all shapes and sizes from various sources. Incoming and outgoing mail can be both paper-based and electronic. Different organisations collect and process mail in different ways. Large organisations may have mail delivered to a central mailroom. In a small organisation, mail may be collected from a post-office box. Organisations may also have specific procedures in place for accessing electronic mail such as emails and faxes.

Some mail must be processed in a particular way; for example, if it is marked as urgent or confidential. You may also receive mail that looks suspicious or is damaged and must be handled carefully.

In this topic you will learn how to:

1A   Check and register incoming mail

1B   Identify titles and locations of company personnel and departments

1C   Identify and distribute urgent and confidential mail

1D   Sort and deliver mail to the right person and location

1E   Record, report and deal with damaged, suspicious or missing items

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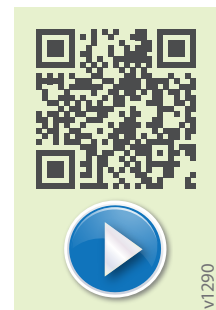
The types of information recorded in the mail register vary from organisation to organisation. Sometimes a file number is assigned to each item of mail.

Information in the mail register should include:

- who sent the correspondence
- the date the correspondence was received
- the addressee or who the correspondence was sent to
- contents of the correspondence
- subject of the correspondence
- date of reply
- condition of the correspondence (for example, was it damaged or without a return address?).

## Example: incoming mail registration form

| Date | Description | Recipient | Attachments | Condition | Action |
|------|-------------|-----------|-------------|-----------|--------|
| 4/7/15 | Letter from lawyer | Mr Brian Cascio | Contract | Good | Deliver |
| 4/7/15 | Letter from customer (cheque enclosed) | Ms Gabrielle O'Brien | Cheque | Envelope torn | Bank cheque and issue receipt |
| 4/7/15 | *HR Magazine* | Ms T Hale | None | Good | Circulate |

# Be mindful of privacy

When you are registering mail, you need to record as much as you can without actually reading the correspondence.

When dealing with mail information, you need to be mindful of relevant privacy laws. Refer to your workplace policies and procedures, as they will help you deal with and understand the issues related to confidentiality and privacy in this area. Policies and procedures are designed to reflect legislation relevant to the workplace.

# Computerised tracking systems

In some larger organisations, mail is registered using specific computer software. These systems enable all relevant items of mail to be registered and classified for distribution and tracking within the organisation. They provide a system of controlling mail and files linked to the mail, from creation to disposal or archiving.

## Legislation

Legislation or Acts are laws that are made by Parliament. These laws are developed to protect people and to support them to do their work safely and ethically.

- **Anti-discrimination**
  Anti-discrimination is covered by a number of Commonwealth and state and territory Acts. For example, the *Equal Opportunity Act 2010* (Vic.) states that you must treat everyone the same regardless of age, gender or background; therefore everyone's mail must be treated respectfully.

- **Confidentiality**
  *Privacy Act 1988* (Cth) states that organisations will have policies and procedures regarding handling mail; using, sharing and storing information. Privacy is also covered by the Privacy Regulations 2013.

## Regulations

Regulations set out the mandatory requirements under the legislation or Acts. The information in the regulations makes it easier for employers and employees to understand their obligations.

- **Manual handling**
  Your organisation's health and safety policies and procedures, which are based on the regulations, are to ensure you do not create hazards or cause risk to your health or safety, when handling mail.

- **Safe environment**
  The information outlined in the Model Workplace Health and Safety Regulations support you when handling mail by ensuring the workplace provides a safe environment.

## Codes of practice

Codes of practice provide guidance to meet the industry standards.

- **Code of Practice for Manual Handling**
  Ensure you follow safety directions when using equipment. Follow manual-handling guidelines, such as using a trolley to deliver heavy parcels, and notify your supervisor if work demands are causing stress.

- **Code of Practice for Hazardous Manual Tasks**
  You will need to register incoming and outgoing mail including the state of the packaging of parcels to ensure hazardous or suspicious mail is not mishandled.

# 1C Identify and distribute urgent and confidential mail

Many organisations have procedures to follow when sorting mail. You need to find out what the procedures are in your workplace. If in doubt, ask your supervisor.

Certain types of mail may be separated from general mail before opening so they can be handled differently. These include confidential mail and urgent mail as shown below.

### Confidential mail

Mail marked confidential, personal or private should not be opened, unless you are authorised to open it. If you open this mail by mistake, you should quickly re-seal the envelope with tape and write on it 'Opened by mistake' and your initials. It is not possible to do this for faxes and emails.

If an email message is marked confidential and the addressee's name is written in the message subject line, you can leave it unopened and forward it to the receiver or send a message to let them know the mail has arrived.

### Urgent mail

Some mail is marked urgent. If it is also marked confidential or personal, you should treat it as confidential first and not open it. You can either deliver urgent mail immediately to the person it is addressed to or you can make sure it goes to the top of the pile when you are prioritising mail for that person.

Another form of urgent mail is Express Post. The sender pays extra postage for an item to be priority processed for prompt delivery, usually the next working day.

An organisation may have specific procedures in place for sorting and distributing urgent mail.

## Practice task 3

Read the case study, then answer the questions that follow.

### Case study

Fiona is called in for one week's work in the mail department of a large clothing manufacturer. On her first day she registers and sorts the mail in the incoming mailbox as soon as she arrives at work. Then she continues with other duties. After lunch, she receives emails from three company employees who are expecting Express Post invitations to an important function, but have not received them. Fiona knows that she cleared the box, but decides to check the incoming mailbox again. She discovers the three Express Post letters there, along with the rest of that day's mail.

Fiona learns that the mail she had sorted earlier that morning was actually left over from the previous week. She had not followed the company's policy to check incoming mail again before lunch.

## Example: circulation slip

| Circulation slip | | | |
|---|---|---|---|
| **Priority** | **Name** | **Date received** | **Date passed on** |
| | | | |
| | | | |
| | | | |
| | | | Date returned: |

To speed up circulation, please:

- read, review or photocopy the attached material ASAP
- circulate to your team when appropriate
- pass on to the next listed person.

Return to:

# Deliver mail

Mail should always be forwarded to the recipient within the organisation's designated time lines so business is conducted effectively. Speak to your supervisor if you ever have any problems with the time lines. Sometimes the problems may be out of your control; for example, if the mail is delivered late.

You can distribute mail in various ways. For example, you may place mail for people in a separate folder and deliver it to their in-tray. Some organisations may have an area where employees collect mail and you may be responsible for depositing mail in the correct pigeonholes.

Large organisations may have mail collection points for each department. Organisations with numerous offices in various locations may have an internal mail system, with specified collection points and pick-up and drop-off times.

There may be a number of different internal distribution systems operating at the same time.

## 1E | Record, report and deal with damaged, suspicious or missing items

If you are responsible for receiving and distributing incoming mail, you need to know how to deal with, record and report damaged mail, suspicious mail or missing items. Some of the issues you may have to deal with when managing mail are shown below.

**Damaged mail**

Some mail may arrive damaged. Mail can be damaged in transit in various ways including:

- exposure to the weather – rain can cause water damage, which may cause printed text to run and contents to swell and spoil
- rough handling – address labels may be torn or contents broken
- theft or pilfering – parcels arrive cut open, with some or all of the contents missing.

If mail arrives damaged, you need to establish or follow company procedures that may require you to:

- contact the sender to ensure that everything sent was received
- negotiate replacement of missing or damaged items with the sender
- fill out forms for the sender's insurance company.

If you are using a letter opener, it is possible that you may accidentally damage a letter. If this happens, you should repair the letter, mark it 'Accidentally damaged' and initial and date it.

## Practice task 5

Read the case study, then answer the questions that follow.

### Case study

Adrian works on reception for a large organisation. One day he receives a parcel from Sweet Thing Chocolate Company that was ordered. The string around the parcel is broken, there is a slit in the cardboard box, and it is almost empty with only a few chocolates at the bottom.

1. List the steps Adrian should take before delivering the parcel to the recipient/s.

2. Where and how should he record the steps he took?

## Summary

1. Organisations receive various types of mail from a range of sources.

2. Each organisation has its own requirements for receiving, documenting and distributing mail. You need to know your organisation's policies, procedures and requirements.

3. Different types of mail must be processed in particular ways. Be sure you know how to deal with urgent, suspicious, damaged and confidential mail.

4. Efficient distribution of mail requires knowledge of company personnel, departments and locations.

5. Accurate and current record keeping is an important component of handling mail. You may need to refer to your records if a dispute over correspondence arises.

# 2A    Collect, check and sort outgoing mail

Mail for dispatch can be collected in a number of ways. Large organisations may have an area in each department where items are deposited, then collected periodically and taken to a central mailroom for processing. Small organisations may have central mail trays where employees place mail to be processed. You may be responsible for collecting mail from individuals or they may forward it directly to you.

Make sure you understand the procedures you have to follow for collecting outgoing mail, especially the organisation's time frame for collection. For example, if Australia Post collects mail from your organisation at 4.00 pm each day, make sure you have collected everyone's outgoing mail by no later than 3.30 pm. Then you will have enough time to check that everything has been addressed correctly and to sort the mail according to the delivery requirements.

Your workplace policies and procedures will guide you on the best way to perform these tasks.

## Check mail before dispatch

Before mail items leave an organisation, they should be checked to ensure they are ready for dispatch. Preparation will vary depending on the carrier you are using and their requirements. You can use guides such as the Australia Post 'Post Charges' booklet to help you prepare mail items correctly.

After you have collected the outgoing mail, check that:
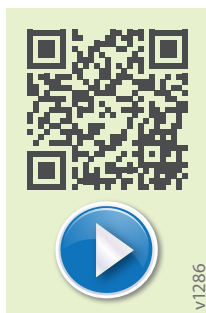
- envelopes have been addressed
- the name and address of addressee are legible
- the address includes the postcode (and that the postcode is not obscured if in a window envelope)
- a return address is included
- envelopes are securely closed
- nothing is protruding from an envelope.

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# Tips for addressing letters

Here are some tips you can use when you are addressing mail.

| Tips for addressing letters |
|---|
| • Use the correct layout and format. Do not use italic, script, compressed or underlined text. |
| • Align each line to the left. |
| • Proofread the information on the envelopes before you send them to ensure all names are spelled correctly and all details are accurate. |
| • Preferably leave two spaces between different address attributes; for example, between the floor number of the organisation and the street address. |
| • The last line of the address should be in capital letters with no underlining or punctuation. |
| • Include the state abbreviation on the last line of the address directly after the place name and separated from it by no more than two spaces. |
| • Include the postcode on the last line of the address directly after the state abbreviation and separated from it by no more than two spaces. |
| • Do not obscure the address. When using window envelopes, make sure the contents cannot slip and obscure the address. |
| • Make sure the return address is included either on the top left-hand corner or on the back of the envelope. |
| • When posting items overseas, include the country of destination in capital letters as the last line of the address. |

# Australian postcode system

The Australian postcode system is a four digit code and is used for sorting purposes. Postcodes relate to specific areas within Australia. Sometimes the postcode can be for one town/city/area in a state or territory, or in some cases the one postcode can relate to a number of towns/areas across state/territory borders.

The postcode is written as part of the address when preparing mail to be sent out, which is why it is important to check you have the right postcode. You can check postcodes by accessing the Australia Post website.

There are basically three types of postcodes currently used in Australia (2015). They include:

1. Delivery areas – general addresses

2. Post-office boxes – which are used by many larger organisations as one means for coordinating incoming mail

3. Large volume receivers – for example, magazine companies use these to coordinate large volumes of magazines being mailed to a distributer

To find or check postcodes or for further information, visit the Australia Post website at: www.auspost.com.au/postcode.

**Parcels**

Pack parcels securely to ensure the contents are not disturbed in transit and all addresses and instructions are clearly visible. There are many products available at the post office or your office supplier that can make packing parcels easier.

**Putting mail together**

If you have a number of items going to the same address, it is usually cheaper to place them in one large envelope and send them together.

**Stationery supply**

If you take your organisation's mail to the post office yourself, keep a supply of envelopes, post office forms and airmail stickers, etc. at your desk to save time at the post office.

# Decide on the carrier

There are many mail services that organisations can use to send their outgoing mail. These include Australia Post, as well as other courier and mail companies. The service you choose may depend on a number of different things, including:

- an organisation's preferred services

- price

- convenience

- the size and weight of the item you are sending

- nature of the contents; for example, fragile or confidential

- the urgency of the item for dispatch

- whether or not you require evidence the item has been received

- the geographical destination of the item

- the number of items to be dispatched.

Make sure you sort mail items correctly according to the appropriate carrier or mail service. You also need to know what each carrier requires regarding addressing, packaging and dispatch times.

# Other postal services

There are a number of alternative postal services operating in Australia. For example, many legal firms and government agencies use a service called DX Mail to deliver and receive their mail. DX Mail has mailboxes (or document exchanges) located all over Australia. DX Mail members receive a DX (Document Exchange) address and a mailbox where they deposit and collect mail. Mail can only be exchanged between organisations that are members of the DX Mail service.

There are also private companies that offer mailboxes to rent where you can collect mail, just as you do at the post office. You can find these services in your telephone directory.

Always check with your supervisor or in your organisation's policies and procedures manual to find out whether your organisation has preferred carriers or special situations where certain carriers are used.

When sorting the mail, make sure you place all standard Australia Post items together and take care that no mail for DX, courier, hand delivery or other delivery service is included by mistake.

# Prepare and collate bulk mail-outs

Some organisations conduct bulk mail-outs where large quantities of mail are sent out at the same time. For example, this may be to advertise a special offer or a sale, to promote a new product or service or to conduct a survey. In some organisations, multiple mail items are sent out every day.

Inserts in bulk mail-outs can include covering letters, brochures, flyers and order forms. Inserts may be described as contents. The number and types of inserts will affect the time it takes you to prepare the mail items and the amount it costs to send them. To help organise and prepare a bulk mail-out, you need to be very well organised as shown below.

# 2B | Process and record outgoing mail

Processing outgoing mail involves calculating and paying for postage and registering mail. The size of your organisation will determine how postage is paid. In a small business, you may be responsible for buying a range of stamps at the post office and attaching them to the mail items yourself. Alternatively, you may purchase pre-paid envelopes.

Some businesses have an account at their local post office. If this is the case, you usually have to fill out a form listing the items for dispatch and calculating the cost of postage. The amount is then billed monthly to your business.

In some larger organisations, there is a franking machine or postage meter in the mailroom that prints the postage directly onto the envelope or onto adhesive strips that can be stuck on parcels.

## Postal charges

Whatever system you use, you must be familiar with the postal charges for different items. Charges will also differ between carriers. The correct postal charges for mail items can be found in the information booklets and directories produced by the carrier you use; for example, the Australia Post Post Charges booklet or the DX Mail DX Directory. You can also find up-to-date charges on the relevant company's website.

Australia Post issues a listing of the cost of non-standard postal items. Collect one from the post office to save delays in the delivery of items that have incorrect postage.

The amount charged to post the item will vary according to:

- size
- weight
- destination
- business discounts
- required delivery time.

## Registered mail

You may need to send an item by registered mail. Generally, registered post is used for items of value and when you need to be sure the item has been delivered. These items may include:

- cheques over $5,000
- legal documents
- security parcels.

Occasionally you may be required to email to a group of people at the same time. Distribution lists are groups or lists of email addresses stored in one place. They make group emailing easy as you can send the same message to a group of people simultaneously with the click of a few buttons.

To make it easy to send emails, you should prepare and maintain distribution lists. These may be prepared using word processing tables or data files, database or spreadsheet records or electronic address books. Follow your organisation's requirements.

## Record outgoing mail

Most organisations record the items dispatched each day. This procedure makes it quick and easy to follow up mail that was not received or to determine exactly when an item was sent. Many organisations have a separate outgoing mail register where these records are kept. Mail records may be electronic and/or paper based. The following shows the different formats in which records can be kept.
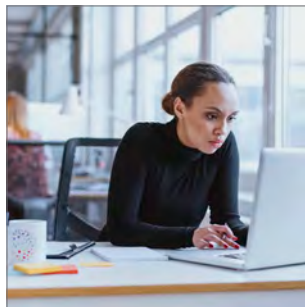


**Electronic records**
- Specialist software
- Databases
- Spreadsheets
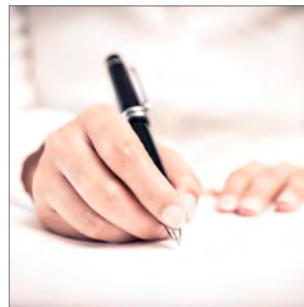


**Paper-based records**
- Mail books
- Forms
- Files

## Type of information to record

You will need to record information in a register.

The type of information you may be asked to record in the register includes the:

- date of dispatch
- sender's name
- sender's department
- addressee or organisation
- type of service used; for example, Express Post
- reference number; for example, Australia Post prepaid Express Post envelopes contain a barcoded reference number for the sender to keep
- receipts attached where appropriate; for example, receipts issued for registered mail items to provide evidence the item has been sent.

# 2C Dispatch mail within time lines



Once you have checked all mail items have been correctly processed, they are ready to send. In some organisations, you will have to take the mail to the post office. In other organisations, the mail is collected from the front office. If you have large quantities of mail to send, it may be easier to wheel the mail to the post office on a trolley, ask a colleague to help you, or make two or more trips. Remember to follow the appropriate work health and safety guidelines when processing and transporting mail. Refer to your workplace policies and procedures for guidance or ask your supervisor.

Time lines and deadlines are extremely important when handling mail. To understand why, think of some of the reasons people send mail. For example, an organisation may pay for goods and services through the mail. When accounts are left unpaid, supply may be stopped. Contracts for future projects may require documents to be signed and sent urgently to close a deal. Many official documents, such as those for the Australian Tax Office, must be lodged by a certain date to avoid fines.

## Dispatch mail on time

It is important for mail items to reach their destination on time, in their original condition. Here are some tips for dispatching mail on time.

**Prepare mail on time**

Familiarise yourself with the length of time it takes to send different sorts of items.

**Choose a mail service**

Choose the appropriate mailing service to get the item to the addressee on time.

# Summary

1. Organisations have their own procedures for collecting outgoing mail. Mail may be placed in central mailing trays, a designated mail collection area or someone may be responsible for collecting mail from staff members.

2. Mail must be checked to see that it is addressed correctly, letters are signed (if appropriate) and the most appropriate packaging is used.

3. The most appropriate delivery option depends on the package's size, cost, urgency, destination and whether evidence of receipt is required.

4. Bulk mail-outs require planning to ensure items have the correct inserts, are addressed correctly and clearly, have the correct postage and are dispatched on time.

5. Postal charges vary according to the type of mail being dispatched.

6. Mail is registered if it contains items of value or if you need to be sure it has been delivered.

7. All outgoing mail must be recorded so it is quick and easy to follow up when mail is not received or to determine exactly when an item was sent.

8. Mail must always be dispatched within required time lines.

# 3A | Evaluate and select the best delivery option/s

If it is part of your role to arrange for the urgent delivery of a particular item or to ensure it is delivered on the same day, you may need to determine the most appropriate way to do this. As always, consult your organisation's policies and procedures for guidance and remember if you are still unsure, ask your manager or supervisor.

## Select the quickest delivery method

There are a number of delivery services that can be used for urgent and same day deliveries as shown below.

**Express Post**

Express Post is a service offered by Australia Post that guarantees delivery to capital cities by the next business day. However, you should be aware that it generally takes two days if the recipient's address is beyond the metropolitan area. Prepaid envelopes in a range of sizes are available for flat documents as well as parcels. This service is an appropriate option for urgent deliveries.

**DX mail**

Using the DX Mail service is an efficient way of sending and receiving mail. However, organisations have to be members of DX Mail and pay an annual membership fee to receive and send mail in this way. If your organisation is a member, find out if any of your customers are fellow members because using this service may be appropriate for sending urgent mail.

**Courier services**

Items are usually sent by courier when they are urgent and when other mail services cannot deliver the item within the necessary time frame. Couriers may also be used when items are fragile or confidential and need to be delivered to a specific person.

Some courier services include:

- door-to-door service
- guaranteed one-hour service in your area for urgent documents
- same day service
- overnight express
- international services.
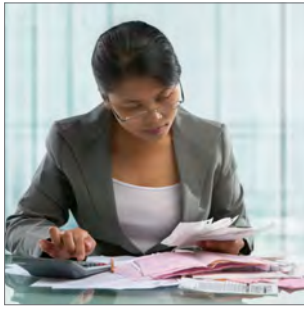
Cost; for example, a service may guarantee fast delivery but the cost may exceed your budget.

Time constraints; for example, how urgent is the item and would a courier be quicker than hand delivery or Express Post?

Delivery location; for example, Express Post mail is only guaranteed within a capital city so normal mail may still be as quick.

Nature of contents; for example, you need to check whether the item is bulky, fragile, confidential or a legal document as these may require different services.

Quantity of delivery items; for example, bulk mail sent through Australia Post may be easier and quicker than delivering it yourself.

# Prepare items for urgent dispatch

Here are some tips for preparing items for urgent dispatch.

| Preparing items for urgent dispatch |
| --- |
| Print addresses and names as clearly as possible. Print in capital letters and check that all address details are correct. |
| Do not use post-office box numbers. Couriers and transport companies cannot deliver items to post- office boxes, as there is no-one to sign for the item when it is delivered. |
| Make sure all consignment notes, invoices and/or address labels are stuck securely to the document or parcel. |
| Make sure the address is the same on the item, the invoice and the consignment note. |

# Record the dispatched items

You must register or make a record of every document or parcel sent by a courier or transport company (similar to the ordinary outgoing mail). There may be a different mail register for urgent items sent with each separate carrier. Always ask the appropriate person if you are unsure how to register these items. Careful registration allows you to track the movements of documents and parcels easily and quickly.

Australia Post's packaging hints brochure contains helpful information about packaging items to ensure your documents and parcels arrive on time and intact.

Occasionally, a document or parcel may go missing. Most carriers have a free tracing service (unless the item was sent more than six months earlier). You need to contact the service and make a request for an item to be traced.

## Practice task 11

Read the case study, then answer the questions that follow.

### Case study

Sarah works for a busy engineering firm whose contracts often need to be sent to the firm's solicitors urgently. At 2.30 pm on Friday she is given a contract in a standard-sized envelope. There is a note attached instructing her to forward the article to Mr Billson at a legal organisation in the city. The contents must be received no later than 3.30 pm that day. Sarah telephones the organisation's preferred courier and books a courier to come immediately. The courier picks up the envelope at 2.45 pm. Sarah doesn't give the courier any specific instructions or record the pick-up in the urgent mail register. At 4.00 pm Mr Billson's personal assistant calls to say that the contract has not arrived. She is very angry.

1. What two things did Sarah forget to do?

2. How could Sarah have handled this situation better?

## Summary

1. Delivery options for urgent mail include Express Post, DX Mail, courier and transport companies, and hand delivery.

2. The delivery service chosen depends on cost, time constraints, delivery location, nature of contents and quantity of delivery items.

3. Urgent items must be prepared for dispatch according to the specifications of the delivery service and the organisation's requirements.

4. Items for urgent delivery should be recorded and followed up to confirm arrival.