# Receive out-going Mail

**2.2.4.1 Introduction to the learning outcome**

This unit covers competencies required to file incoming mail, assign folio and punch and file mail in relevant files.

**2.2.4.2. Performance Standard**

2.2.4.2.1 **File for incoming mail is determined based on the subject**

2.2.4.2.2 Incoming mail is assigned folio as per the workplace procedures

2.2.4.2.1 Incoming mail is punched and filed in relevant files

**2.2.4.3 Information Sheet**

**DEFINITIONS OF TERMS**

**Folio:** It is a cross referencing code usually a number or a few numbers and letters.

**Filing** It is the systematic arrangement of business correspondence and records so that they may be obtained quickly when needed for reference.

**Classification**: Grouping things together on the basis of certain common features. It is the method of putting similar things into one group

**Indexing** An index helps in locating the files needed or it is a method used for making reference to records filed. Some indexes tell us where to find further information on the subject we have looked for.

**Systems:** A set of things working together as parts of a mechanism or an interconnecting network.

**Documents:** A piece of written, printed or electronic matter that provides information or that serves as an official record.

**Filing mail**

The filing process starts immediately after the recording of outgoing letter is over. If the letter which has been received in the office does not require reply, it is then filed. If an incoming letter demands reply, the reply has to be drafted. Immediately frame a draft for reply. Get it approved

by the competent authority. Once it is approved get the letters typed and get it endorsed by the competent authority.

Once the reply is drafted, noted, coded and sent to the dispatch section for onward process, the letter is filed. File the letter incoming and the reply letter in the corresponding file and number the pages filed serially.

**Classification systems for incoming mail**

Mailing systems is of great importance in any organization. There should be well organized and efficient mailing system, otherwise, the activities of any organization cannot be expanded.

Office correspondence can be classified into two:

1. Personal correspondence
2. Business Mail

Mails may be divided into three parts namely:

1. Incoming Mail

Incoming Mail section handles all correspondence coming to an organization. There should be a clear and carefully designed procedure which must be followed properly.

2. Outgoing Mail

This is the correspondence of any kind that is sent out by the organization. It takes the same form as the incoming mail.

3. Inter-departmental Mail (within the department)

These are correspondences written by the staff from within the organization

**Creating incoming mail files**

1. Collecting – the mails to be filed are collected together in a filling tray or basket that is labeled.
2. Inspecting – each mail is inspected of the release symbol or mark which indicates that it is ready for filing. The release symbol/mark may be the initials of the person sending that material for filing; the work ‘file’ or a letter F and the date, a line through the text; or any other previously agreed mark.
3. Indexing – an appropriate caption or name under which the mail will be filed is selected.

4. Cross referencing – if a mail can be filed under more than one heading a cross-reference sheet is prepared.
5. Coding – every mail is marked, i.e. circling or underlining with a coloured felt pen the relevant word to indicate/show how it has been indexed.
6. Sorting – Mails going to the same folder/drawer are placed together to avoid time being wasted by having to return to the same file or drawer repeatedly.
7. Filing – Mails are stored in the correct file folders.

**Folio assignment and indexing**

Folio numbering of records is part of a manual recordkeeping system which is done to ensure there is trueness and integrity of all the individual items placed within a physical record. The folio sheet should be placed within the front cover of paper-based files to indicate the details of all folios as they are added. A folio is a document that is made up of either a single or multiple pages.

When folioing files or other forms of contained records, the following should be observed:

(a) The folio numbers should be placed and the top on the right-hand corner of each front page.

(b) Each new folio added to the record should have a consecutive number.

(c) Commencing at one, the bottom item on the record should come first numbered item and the top item with the last assigned folio number.

(d) Enclosures are supposed to be given the same number as the item followed by a sequential letter until the folio is completely number.

**Indexing**

An index helps in locating the files needed or it is a method used for making reference to records filed. Some indexes tell us where to find further information on the subject we have looked for.

**Removal of the folio sheet from the file**

In case of need to remove a folio from a file, the officer in charge should:

(a) Place a folio removal advice on the file indicating what has been removed, when it was removed and why.

(b) In case the removal was due to relocation into another file, the details of the new file should be stated.

**Document handling**

When handling documents, confidentiality should be highly emphasized. This can be achieved by:

**(a)** Controlling access to the confidential documents. This can be achieved by locking the room upon which the documents are stored and allowing the authorized persons only to access the documents.

**(b)** Shredding of hard copies. If there are hard copies that needs to be eliminated, use a shredding machine in order to destroy them completely.

**(c)** Use lockable cabinets upon which the documents will be stored.\

**(d)** The staff should be well educated on about maintain confidentiality.

**2.2.4.4 Learning Activities**

**Case Study**

As a mail clerk in an organization, you are required to propose information about four machines of your choice used in handling incoming letters. Give information on

(a) Its purpose (b)

Its advantages

(c) How it is operated.

**Practical Activities**

There is a concern in your company because letters appear to be going astray. You are asked to devise a system for handling the incoming mail ensuring the maximum of security especially for remittances. Set out your plan.

**2.2.4.5 Self-Assessment**

1. As a mail clerk, you will be expected to receive many mails in your

organization. Which six steps would you take to handle these mails?

2. John has been engaged in the central mail room. What duties should he

undertake?

3. An office receptionist may receive correspondence from the registry office. One is supposed to stamp the mails upon receiving them. What effects would an organization experience if the dates were not stamped on the correspondences.

4. As an executive assistant you discovered that your assistant keeps sorting mails in the wrong manner what are three demerits would an organization get from this.

5. Mary is an office administrator trainee who has come for a three months attachment in your firm. What three categories of mails will you induct him on?

6. You work as a receptionist in tropical limited, you have received different types of mails that need to be sorted, which three ways you would use to sort these mails?

7. Organizations handle many correspondences in their office. Jane is a newly employed office administrator, she received mails from Mwega company.
Advise her on the three things to consider when recording these mails?

8. A correspondence may require attention of more than one officer. In such a situation, a circulation slip is prepared. What contents are found in the circulation slip?

**2.2.4.6 Tools, Equipment, Supplies and Materials**

· Computers

· Mailroom table

· Sorting trays

· Date/time stamp

· Addressing machine

· Franking machine

· Office glue

· Pin remover

· Stapler

· Paper punch

· Opening knife

· Internet connectivity

· Registers

· Stationery

· Signage

· Organization chart

· Reference materials

· Office memory aids

· Mailroom equipment

**2.2.4.7 References**

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