



# Mailroom Operations Checklist

## Mail Acceptance & Sorting

Tasks related to receiving incoming mail and packages, and initial sorting.

**Time Mail Received**

**Number of Incoming Mailpieces**

Enter a number...

**Number of Incoming Packages**

Enter a number...

**Mail Carrier Type**

☐ USPS

☐ FedEx

☐ UPS

☐ Other

### Special Handling Required?

- ☐ Certified Mail
- ☐ Registered Mail
- ☐ Signature Required
- ☐ None

### Notes on Incoming Mail (Damage, Unusual Items)

Write something...

### Delivery Point for Undeliverable Mail

 [Set My Current Location](#)



### Date of Receipt

Enter date...

## Mail Distribution

Processes for delivering mail and packages to intended recipients within the facility.

**Number of Mailboxes/Recipient Locations**

Enter a number...

**Distribution Method (Manual/Automated)**

- ☐ Manual
- ☐ Automated

**Scheduled Distribution Time**

**Notes on unusual delivery instructions (e.g., specific access codes)**

Write something...

**Key Drop-off Location (if applicable)**

 Set My Current Location



### Confirmation of Delivery (Required?)

☐ Yes

☐ No

### Departments Receiving Mail

☐ Administration

☐ Finance

☐ HR

☐ Sales

☐ Engineering

☐ Other

### Last Distribution Route Review Date

Enter date...

## Outgoing Mail Processing

Tasks related to preparing and dispatching outgoing mail and packages.

### Time Mail Prepared for Carrier

### Number of Large Packages (over 10 lbs)

Enter a number...

### Total Number of Letters/Small Packages

Enter a number...

### Shipping Method Used (if applicable)

- ☐ USPS Priority Mail
- ☐ USPS Ground
- ☐ FedEx Ground
- ☐ FedEx Express
- ☐ UPS Ground
- ☐ UPS Express
- ☐ Other (Specify in LONG\_TEXT)

### Specify 'Other' Shipping Method (if selected)

Write something...

### Postage Used (Total)

Enter a number...

### Confirmation/Tracking Used?

- ☐ Signature Confirmation
- ☐ Tracking Number
- ☐ None

### Receipt Image (if applicable)

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### Date Mail was Dispatched

Enter date...

## Security & Access Control

Measures to ensure the security of mail and packages, and control access to the mailroom.

### Mailroom Access Granted to?

- ☐ Authorized Personnel Only
- ☐ Contractors (with escort)
- ☐ General Public (limited access)

### Number of Authorized Personnel with Mailroom Access

Enter a number...

### Type of Access Control System Used?

- ☐ Keyed Entry
- ☐ Keycard/Fob
- ☐ Biometric Scan
- ☐ PIN Code

### Last Review of Access List

Enter date...

### Summary of Security Incident Log (if any)

Write something...

### Procedure for Handling Suspicious Packages?

- ☐ Contact Security
- ☐ Isolate and Notify Supervisor
- ☐ Follow established protocol (detailed in SOP)

### Security Camera Footage Review (if applicable)

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Last perimeter check for mailroom area

## Equipment Maintenance & Operation

Ensuring mailroom equipment (scales, postage machines, sorters) are functioning correctly.

### Last Postage Machine Maintenance

Enter date...

### Postage Machine Meter Reading

Enter a number...

### Notes from Postage Machine Maintenance (if applicable)

Write something...

### Scale Calibration Reading (Weight)

Enter a number...

### Last Scale Calibration Date

Enter date...

### Sorter Operational Status

- ☐ Operational
- ☐ Needs Repair
- ☐ Out of Service

### Description of Sorter Issues (if any)

Write something...

### Status of Shredder

- ☐ Operational
- ☐ Needs Maintenance
- ☐ Out of Service

## Inventory Management & Supplies



Tracking and replenishment of mailroom supplies (envelopes, labels, postage).

### **Current Quantity of Standard Envelopes**

Enter a number...

### **Current Quantity of Legal Envelopes**

Enter a number...

### **Current Quantity of Bubble Mailers (Various Sizes)**

Enter a number...

### **Current Quantity of Shipping Labels**

Enter a number...

### **Current Quantity of Postage Stamps**

Enter a number...

### **Current Quantity of Moving Boxes (Small/Medium/Large)**

Enter a number...

### **Preferred Shipping Carrier (for supplies)**

☐ USPS

☐ UPS

☐ FedEx

☐ Other

### Date of Last Supply Order

Enter date...

### Notes on Supply Levels or Upcoming Needs

Write something...

## Waste Disposal & Recycling

Proper disposal of mailroom waste, including confidential documents and packaging materials.

### Quantity of Confidential Shredding Bags

Enter a number...

### Number of Cardboard Boxes Recycled

Enter a number...

### Weight of Recycled Paper (lbs/kg)

Enter a number...

### Recycling Bin Status (Full/Partial/Empty)

- ☐ Full
- ☐ Partial
- ☐ Empty

### Confidential Waste Disposal Method

- ☐ Shredding
- ☐ Secure Incineration
- ☐ Other (Specify in Long Text)


### If 'Other' Disposal Method Selected, Please Explain

Write something...

### Last Waste/Recycling Pickup Date

Enter date...

### Waste Disposal Manifest (if applicable)

 Upload File

## Record Keeping & Documentation

Maintaining accurate records of mail volume, postage costs, and other relevant data.

### Total Incoming Mail Volume (Daily)

Enter a number...

### Total Outgoing Mail Volume (Daily)

Enter a number...

### Postage Expenses (Daily)

Enter a number...

### Date of Mail Log Entry

Enter date...

### Time of Mail Log Entry


### Notes on Unusual Mail Events (e.g., damaged mail, security concerns)

Write something...

### Method of Postage Calculation (for auditing)

- ☐ Automated System
- ☐ Manual Calculation

### Scanned Copy of Postage Manifest (if applicable)

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### Description of Mail Retention Policy Adherence (if applicable)

Write something...