**PIP PROCEDURES**

PIP stands for “Person in Putney,” a designated PM who assists the remote PM with procedures and work flow.

While the PIP does handle some aspects of the remote PM’s workload, it is important to remember that the PIP is NOT primarily responsible for the work orders, their content, or any questions that may arise.

The PIP’s role is to assemble all the elements of the remote employee’s work order and put WOs forward, to send necessary pieces of the WO to the remote employee for billing upon completion of a job, assist with lettershop proofing, and various other tasks that require a physical presence.

Expectations:

* If the remote employee releases a job prior to 3:30pm, the expectation is that the job should be forward to be picked up the next morning for 9am. \*If this will be an issue, please have a conversation and decide if PIP needs assistance from another PM
* If there are proof approvals, the PIP should print out the forwarded approval and bring to lettershop ASAP.
* If the PIP has any questions regarding the WO, creating a sample, any discrepancies, etc., they should reach out to remote employee before submitting the WO.

Communication:

* Each morning, the remote employee will call, email, or message the PIP to let them know what jobs she intends to put forward that day. This gives the PIP the opportunity to plan their day and set aside some time for PIP tasks.
* At the end of the day, the remote employee will check in again if anything from the morning communication was not completed, with an updated timeline for its release.

1. **Work Order Release**

* The **remote employee** will send the PIP an email with a PDF of the entire WO and job bag contents
* The email will also contain information regarding anything important or out of the ordinary to note, and instruction on placement of Seq #, T&P placement, and postage affixed for envelopes (as this positioning information is not listed in the work order).
* The **PIP** prints out the release email and the attached PDF, and organizes the documents for placement in the job bag.
* **PIP** should ensure that any marked up text boxes, etc. on PDF have printed visibly within the margins of the physical print out
* **PIP** will highlight any variable fields on merge documents
* **PIP** retrieves any materials not printed in from the remote employee’s sample slot at PIP’s desk.
* **PIP** creates a sample based on the dimensions and paper stock information in the WO, gets a weight for the sample.
* **PIP** updates the weight on the WO and in Mail Shop and writes “Or Before” (if necessary) on each of the department WOs, or includes “Not Before” placard in the necessary job bags.
* **PIP** puts the assembled WO in the “Orders in to DP” bin

2. **Materials**

* While the physical samples slot is located at the PIP’s desk, the **remote employee** is responsible for monitoring when samples for their clients arrive through Mail Shop.
* When materials arrive for a job that is already forward, **remote employee** allocates the materials to the job in Mail Shop, creates a new PDF of the Warehouse WO, and emails it to the PIP
* **PIP** locates the WO and follows the steps for “What to do when materials arrive” (\*\*\*link to that doc, but IDK where it will live) procedure from where remote employee left off.

3. **Proofing**

* All departments except Lettershop send their proofs directly to the remote employee, and communication and approval is done via email, without the PIP’s involvement
* LETTERSHOP (addressing) proofs utilize the **PIP**.
  + Lettershop employee will scan a proof to remote employee’s scans folder and advise that the proof is there for approval.
  + Lettershop employee will bring the job bag to **PIP** and advise that the job is waiting on proof approval.
  + Since lettershop employee does not have convenient access to email, once the proof is approved, **remote employee** will forward the approval to the PIP
  + **PIP** will print out the forwarded approval, highlight approval verbiage, and staple the email to the physical proof.
  + **PIP** returns the job bag, with approval, to Lettershop employee ASAP

4. **Billing**

* It is important that **PIP** sends completed jobs to remote employee for billing within 1-2 days of receipt.
* Remote employee’s billing slot is located at the PIP’s desk. Warehouse employee will place completed WOs in the remote employee’s billing slot.
* The **PIP** should assemble only these necessary items, in this order, to scan to remote employee, removing any staples as they go.
  + Consolidated WO
  + Postal One receipt, if applicable, with “Mailer declared total pieces” and “Total adjusted postage” fields highlighted
  + 3602 Postal Statement
  + NDC/SCF paperwork, if applicable, including Bill of Lading
  + Foreign WO only, if applicable
  + Print WO only, if applicable
  + Client Services WO only, if applicable
  + DP Worksheet
  + Dedupe Report (pre & post)
  + Warehouse WO only
* **PIP** scans documents in this order to remote employee’s Scans folder on Watson
* **PIP** goes into remote employee’s Scans folder and renames document to “WO # COMPLETE”
* **PIP** reassembles job bag in correct order for billing and restaples documents, then moves the job bag to “Scanned to Remote Employee Billing” slot at PIP’s desk.
* Once the **remote employee** has marked up the WO appropriately with correct prices for billing, **remote employee** sends PIP a PDF entitled “WO # BILLING” which contains any updates to the documents for billing. This PDF will ONLY include documents with updates.
* **Remote employee** will also indicate in the email if any of the WOs are to be billed together.
* **PIP** places the updated documents in the appropriate place in the job bag, with the new Consolidated WO on top, and submits to Billing department for invoicing. If any WOs are to be billed together, **PIP** places all of them in a large job bag with a note indicating WO #s to bill together.

4. **Other**

* There are other instances where the remote employee will require the PIP’s assistance. These are circumstantial and the urgency and expected turnaround time should be indicated by the remote employee.