



CASS™
(Coding Accuracy
Support System)

And

MASS™
(Multiline Accuracy
Support System)

**2005 – 2006 Cycle
Partnership in Tomorrow Meeting
August 24 - 25, 2004**

The 13th annual “Partnership in Tomorrow” meeting was hosted by the National Customer Support Center (NCSC) in Memphis, TN with attendees from various industry representatives.

These minutes are a record of discussions held during the meeting by the CASS/MASS and Address Quality Department.

Opening remarks by Janice Caldwell; “As partners we are trying to achieve the “highest quality address on a piece of mail as efficiently as possible.” As a joint effort with the mailers we will work together to accomplish a solution jointly with the mailers.”

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Revisit Rules

Address Standardization (March 17, 1992 Minutes)

All delivery address components must be presented and separated by a single space. The address components may be presented in one of three ways:

- As they appear in the ZIP+4 File
- Properly spelled out
- Properly abbreviated using the standard abbreviations as stated in Pub 28

Stack (July 27, 1995 Minutes)

In a batch mode, if a “stack” is offered to the user, the user must CASS certify separately.

It is acceptable to display a “stack” to a user in an on-line mode providing there is no automated “stack” selection capability. The “stack” should be provided as information to the user. Once the information is reviewed, the user may re-enter a modified version of the input.

Street Address Matching (Address Matching Guidelines 1995)

When an address is missing or has one component in error within the input ZIP Code and you failed to find an exact match in the finance/last line number, you should add, change, or delete that component if the result is unique.

Example 1 – Match

Input: 325 S HAMPTON DR
IRMO SC 29063

Expected Return: 325 SOUTHAMPTON DR
IRMO SC 29063-8430

Incorrect Match: 325 HARLESTON RD
IRMO SC 29063-2714

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
29063	301	399		SOUTHAMPTON DR			0000-8430	R013	X24061
29063	301	399		HARLESTON	RD		0000-2714	R016	X24061

Street Address Matching (Address Matching Guidelines1995)

Example 2 – Match

Input: 2 OAK LN
 OLD BETHPAGE NY 11804

Expected Return: 2 OAK LN
 OLD BETHPAGE NY 11804-1016

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
11804	2	98		OAK	LN		0000-1016	C003	V15190

Example 3 – No Match

Input: 299 STONE PILE SCHOOL RD
 MERCER, PA 16137

Expected Return: 299 STONE PILE SCHOOL RD
Return Input: MERCER PA 16137

Incorrect Match: 299 SCHOOL ST
 MERCER PA 16137-8507

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
16137	269	299		STONE BASE	RD		0000-3429	R008	X19765
16137	201	299		STONEBORO	DR		0000-4343	R004	X19765
16137	259	299		STONEPILE	RD		0000-3343	R001	X19765
16137	200	299		SCHOOL	ST		0000-8507	R008	X19765

Street Address Matching (Address Matching Guidelines1995)

Example 4 – No Match

Input: 3260 WOODS TRAD
BENSON NC 27504

Expected Return: 3260 WOODS TRAD
Return Input BENSON NC 27504

Incorrect Match: 3260 WOODS CROSSROADS RD
BENSON NC 27504-7977

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
27504	3200	3298		WOODS CROSSROADS		RD	0000-7977	R004	Y14812

Small Town Default Logic

This rule will no longer apply: (October 15, 1996 Minutes)

Small town default logic refers to matching addresses to ZIP + 4 records within finance numbers consisting of PO Box, General Delivery or Postmaster.

When a match cannot be made to the ZIP+4 File, address-matching software must determine what kind of records exists in the ZIP+4 File. If the ZIP Code that was matched has only a General Delivery record and no PO Box records, assignment of the General Delivery add-on code 9999 will remain acceptable.

Note: In Cycle I, the return of '0000' in the ZIP+4 add-on, or the return of an invalid '9999' in the ZIP+4 add-on, was considered a fatal add-on error, an immediate certification failure, and required re- testing.

Beginning with Cycle J, default matches will no longer be acceptable.

Small Town Default Logic (October 15, 1996 Minutes)

Example 1 – No Match

Input: 66 MERRY HILL RD
FORT MITCHELL VA 23941

Expected Return: 66 MERRY HILL RD
Return Input: FORT MITCHELL VA 23941

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
23941				GENERAL DELIVERY			0000-9999	G000	X26647

Example 2 – No Match

Input: 199 MOCKINGBIRD LN
NASSAU DE 19969

Expected Return: 199 MOCKINGBIRD LN
Return Input: NASSAU DE 19969

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
19969	5	5		POINT	PLZ		0000-9998	B000	V21332
19969	1	58		PO BOX			0001-0058	B001	V21332
19969				GENERAL DELIVERY			0000-9999	G000	V21332

Example 3 - Match

Input: GENERAL DELIVERY
SEVERN VA 23155

Expected Return: GENERAL DELIVERY
SEVERN VA 23155-9999

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
23155				GENERAL DELIVERY			0000-9999	G000	X27624

Unique ZIP Code Logic (October 6, 1998)

When an input address contains a unique ZIP Code, developers must check whether or not the input city name corresponds with the unique ZIP Code. The term "corresponds" is defined as showing within the City/State File as an entry associated with that specific ZIP Code. It does not matter whether the input city name is shown as a non-mailing name. If the input city name is found in the City/State File and is associated with the unique ZIP Code, it is considered to correspond. If the input city name is not shown as an entry associated with the unique ZIP Code, it does not correspond.

When an input city name does not correspond with the unique ZIP Code, software should proceed as if the input ZIP Code was not present. A search based on the city name should take place, and output the city name and ZIP Code based on the match found. If a match is not made using the city name, software must not return the input unique ZIP Code on the output.

Example 1 (Input city name and ZIP Code does not correspond)

Input: 8500 HIGHWAY 25
BELLEVIEW FL 60674

Expected Return: 8500 E HIGHWAY 25
BELLEVIEW FL 34420-5417

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
34420	8500	8630	E	HIGHWAY 25			0000-5417	R001	Y21456

City/State File

ZIP Code	ZIP Class Code	City Name	State	Finance #
60674	U	CHICAGO	IL	161542
60674	U	LASALLE NATIONAL BANK	IL	161542
34420		BELLEVIEW	FL	110735

Unique ZIP Code Logic (October 6, 1998)

Software must not code to a record in a unique ZIP Code unless a match is made to a firm record in the unique ZIP Code. This restriction is to minimize situations where a “close-match” to a record in the unique ZIP Code is better than the correct match outside of the unique ZIP Code. By limiting these matches to firm records, agreement between the input and the ZIP+4 record firm name will reduce the chance of error.

Example 2

Input: POPLAR BEAR VACATIONS
0 LOUISIANA STATE UNIV
BATON ROUGE LA

Expected Return: POLAR BEAR VACATIONS (Street Match)
0 LOUISIANA STATE UNIV
BATON ROUGE LA 70893-9300

Incorrect Match: POPLAR BEAR VACATIONS (Firm Match –Louisiana State Univ)
0 LOUISIANA STATE UNIV
BATON ROUGE LA 70803-3336

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
70893	0	0		LOUISIANA STATE UNIV			0000-9300	R000	Y23370 (S)
70803	0	0		LOUISIANA STATE UNIV			0000-0100	R000	Y23370 (F)

City/State File

ZIP Code	ZIP Class Code	City Name	ST	Finance #
70893		BATON ROUGE	LA	210624
70803	U	BATON ROUGE	LA	210624

Last Line Matching Logic (2002-2001 Minutes)

Rule: Modification of Last Line Matching Policy.

To reduce the possibility for miscoding, address matching software must search the input ZIP Code or the ZIP Codes associated with the input city name more exhaustively prior to expanding search to entire finance number.

CASS requires address-matching software to restrict matching to input ZIP Code or ZIP Code(s) associated with input city name in inexact match conditions.

If expansions of search of entire finance number occur, potential matches are limited to exact matches of street address data only.

The basis for determining potential matches when the input ZIP & City/State **correspond** will be:

- Exact match within input ZIP Code
- Exact match within ZIP Code(s) associated with input City/St
- Inexact match within input ZIP Code
- Inexact match within ZIP Code(s) associated with input City/St
- Exact match within finance number

Example 1

(Exact match within input ZIP Code)

Input: 2748 S HIGHWAY 27
STAB KY 42501

Expected Return: 2748 S HIGHWAY 27
STAB KY 42501-3010

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
42501	2746	2798	S	HIGHWAY 27			0000-3010	R012	X16408

When input ZIP & City/St from same finance number do not correspond:

- Exact match within ZIP Code(s) associated with input City/St
- Exact match within ZIP Code
- Inexact match within ZIP Code(s) associated with input City/St
- Inexact match within input ZIP Code
- Exact match within finance number

Last Line Matching Logic (2002-2001 Minutes)
Rule: Modification of Last Line Matching Policy.

Example 2
(Inexact match within input ZIP Code)

Input: 79 B
 AUDUBON NJ 08104

Expected Return: 79 B WALK
 CAMDEN NJ 08104-2602

Incorrect Match : 79 ROAD B
 AUDUBON NJ 08106-1850

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
08104	1	99		B	WALK		0000-2602	C045	V10205
08106	13	99		ROAD B			0000-1850	C020	V10058

City/State File

ZIP Code	City Name	State	Finance #
08104	CAMDEN	NJ	331260
08104	SOUTH CAMDEN	NJ	331260
08106	AUDUBON	NJ	331260
08106	AUDUBON PARK	NJ	331260
08106	CAMDEN	NJ	331260

Last Line Matching Logic (2002-2001 Minutes)

Example 3

(Inexact match within ZIP Code(s) associated with input City/St)

Input: 89 COTTAGE ST
DORCHESTER MA 02101

Expected Return: 89 COTTAGE CT
DORCHESTER MA 02125-2912

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
02125	65	97	E	COTTAGE	ST		0000-2641	C017	V21665
02125	1	99		COTTAGE	CT		0000-2912	C017	V21665
02125	65	199	W	COTTAGE	ST		0000-2641	C017	V21665

City/State File

ZIP Code	City Name	State	Finance #	Last Line Key
02101	BOSTON	MA	240799	V21508
02125	BOSTON	MA	240799	V21508
02125	DORCHESTER	MA	240799	V21665
02125	UPHAMS CORNER	MA	240799	V22668

Certification of Configuration and User Parameters (July 25, 1995)

Address matching software developers must not allow the generation of Form PS 3553 if the address matching process has been modified. The software version, configuration and date of the database used are not to be changeable by the user through the software.

Once an address is presented to your address-matching process, any user modifications to the process must be CASS-Certified™. If a customer/user writes their own driver or modifies the existing driver software provided by the software developer, the software must be CASS-Certified separately by the user.

Preferred Last Line City State Key (2002-2003 Minutes)

This rule affects only the output city name and how it is only determined after the ZIP+4 records are selected. In cases where the ZIP+4 PLL key are different from the default city name, CASS declares this an override city name. The rule is when an override condition is present and an acceptable city name is on the input address record, the override takes precedence over the input city name.

Acceptable City Name On Input	5-Digit Preferred Last Line City/State Key (Default)	ZIP+4 Preferred Last Line City/State Key	CASS Standardized City Name on Output
WALLS TOWNSHIP	NEPTUNE	TINTON FALLS (Override)	TINTON FALLS
NEPTUNE	NEPTUNE	TINTON FALLS (Override)	TINTON FALLS

Example 1 - ZIP+4 File

ZIP Code	Carrier Route	+4 Code	Last Line
07753	C024	0000 7918	V11005

Input: 60 DANBURY RD
WALLS TOWNSHIP NJ 07753

Expected Return: 60 DANBURY RD (Match)
TINTON FALLS NJ 07753-7918

Chase the Base (August 13, 2001)

CASS has determined that matches made to hi-rise delivery point alternate records, when the input address contains valid secondary address unit numbers, cannot obtain optimum sequencing via automation since '99' is assigned as the delivery point.

To improve the sequencing of the mail, CASS will require address-matching software to 'chase the base' or to find the hi-rise record associated with the alternate record when presented with this condition.

Every alternate hi-rise record is associated with a base record in the ZIP+4 File. Using ZIP+4, software locates the hi-rise base default record for any given alternate record. Once obtained, the hi-rise default base record is appended with the secondary address information and is resubmitted.

If the secondary unit number is valid within a secondary range, then software must make the ZIP+4 exact match. If no secondary range is valid for the input, then software *reverts* back to the originally matched hi-rise alternate record.

Example 1:

Input: 220 BROWENTON PL #165
LOUISVILLE KY 40222

Expected Return: 2000 WARRINGTON WAY STE 165 (Match)
LOUISVILLE KY 40222-6409

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Desc	Secondary Range	Base/Alt	ZIP Code	+4 Code
H	220 220	BROWENTON	PL			A	40222	6467
H	2000 2000	WARRINGTON	WAY			B	40222	6467
H	2000 2000	WARRINGTON	WAY	STE	165 165		40222	6409

Example 2:

Input: 721 LOCUST ST #2900
SAINT LOUIS MO 63101

Expected Return: 505 N 7TH ST STE 2900 (Match)
SAINT LOUIS MO 63101 - 1618

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Desc	Secondary Range	Base/Alt	ZIP Code	+4 Code
H	721 721	LOCUST	ST			A	63101	1611
H	505 505	7 TH	ST			B	63101	1611
H	505 505	7 TH	ST	STE	2900 2900		63101	1618

Chase the Base (August 13, 2001)

Example 3:

Input: 19 SMITH HALL
NEWARK DE 19716

Expected Return: 18 AMSTEL AVE RM 19 (Match)
NEWARK DE 19716-2599

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Desc	Secondary Range	Base/Alt	ZIP Code	+4 Code
H	19 19	SMITH HALL				A	19716	2599
H	18 18	AMSTEL	AVE			B	19716	2599
H	18 18	AMSTEL	AVE	RM	15 342		19716	2599

Proposed 90 Day Requirement

End users have requested they receive the CASS software 90 days prior to July 31, 2005 implementation which would require software release by May 1st, 2005. Janice Caldwell has proposed that no decision be made on the 90 day requirement until after the developers have been given the minutes and Stage 1 File.

Software developers must provide feedback to the CASS/MASS Department if they can/cannot release software to their customers by May 1st, 2005. This feedback will be evaluated, after the review a determination will be made as to when the "90 day requirement" will be implemented. All feedback should be compiled before Thanksgiving, November 25, 2004.

Suggestions regarding the 90 day requirement:

- Delay 90 day implementation until Cycle K (2006-2007)
- Move (PIT) Partnership in Tomorrow meeting to June 2005

Some of the issues from the vendors regarding the "90 day rule" were:

- Timing issue for multiple party chains
- Time to accommodate the developers and mainframe users
- Time to receive/implement data changes

New Grading Rules

The standard passing score for both CASS and MASS will change to 98.5% for ZIP+4, Carrier Route, 5-Digit. This will also include all categories for Cycle J, 2005-2006.

A review of customer files by categories revealed that most customers exceeded the 98.5%.

- *LACS^{Link™}*
- *Abbreviated Alias (City/State file)*
- *Magnet Rule*
- *No platform waivers*
- *The following optional categories will now be required*
 - *TA*
 - *TB*
 - *TC*
 - *TD*
 - *TE*
 - *W3*
 - *5K*
 - *7B*

Recombination (August 13, 2001)

CASS has determined that a greater number of hi-rise exact assignments are possible when software recombines specific primary address values with secondary address values under defined conditions. Through this recombination activity, CASS certified software might increase hi-rise depth-of-code matches.

CASS will require software to transpose primary address number values that, when combined with secondary address information, obtains a high-rise exact match by matching to a valid secondary address range in the ZIP + 4 file.

CASS will also test for secondary address values transposed with other secondary address values that through recombination a hi-rise exact match is achieved.

Required Category

Example 1

TA Recombine hyphenated trailing primary alpha with secondary number

Input: 50-B MELCHER ST #1
BOSTON MA 02210

Expected return: 50 MELCHER ST STE 1B
BOSTON MA 02210-1520

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Range	ZIP Code	+4 Code
S	2 98	MELCHER	ST		02210	1502
H	50 50	MELCHER	ST		02210	1520
H	50 50	MELCHER	ST	1B 1C	02210	1520

Recombination (August 13, 2001)

Example 2

TB Recombine non-hyphenated trailing primary alpha with secondary number

Input: 17B CARSON ST APT 1
DORCHESTER MA 02125

Expected return: 17 CARSON ST APT 1B
DORCHESTER MA 02125-1270

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Range	ZIP Code	+4 Code
S	1 99	CARSON	ST		02125	1208
H	17 17	CARSON	ST		02125	1270
H	17 17	CARSON	ST	1B 6B	02125	1270

Example 3

TC Recombine hyphenated trailing primary numeric with secondary number

Input: 1853-1 COLUMBUS AVE APT A
ROXBURY MA 02119

Expected return: 1853 COLUMBUS AVE APT 1A
ROXBURY MA 02119-1007

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Range	ZIP Code	+4 Code
S	1841 1869	COLUMBUS	AVE		02119	1043
H	1853 1853	COLUMBUS	AVE		02119	1007
H	1853 1853	COLUMBUS	AVE	1A 1B	02125	1007

Example 4

TD Recombine hyphenated trailing alphanumeric/numeric alpha with secondary number

Input: 652-1L HYDE PARK AVE
ROSLINDALE MA 02131

Expected return: 652 HYDE PARK AVE APT 1L
ROSLINDALE MA 02131-4747

Recombination (August 13, 2001)

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Range	ZIP Code	+4 Code
S	638 698	HYDE PARK	AVE		02131	4724
H	652 652	HYDE PARK	AVE		02131	4732
H	652 652	HYDE PARK	AVE	1L 1R	02131	4747

Example 5

TE Recombine secondary values into one; exact match only

Input: 17 CARSON ST #1 #B
DORCHESTER MA 02125

Expected return: 17 CARSON ST APT 1B
DORCHESTER MA 02125-1270

ZIP+4 File

Record Type	Prim Range	Street Name	Suffix	Secondary Range	ZIP Code	+4 Code
S	1 99	CARSON	ST		02125	1208
H	17 17	CARSON	ST		02125	1270
H	17 17	CARSON	ST	1B 6B	02125	1270

Required Category

Example

W3 – Multiple finance number matching; no correlation between city and ZIP Code – match ZIP Code

Input: 1501 BROAD STREET RD
CARLTON AL 36030

Expected return: 1501 BROAD STREET RD
FOREST HOME AL 36030-5313

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
36030	1501	1599		BROAD STREET	RD		0000-5313	R001	Y10447

City/State File

ZIP Code	City Name	State	Finance #
36030	FOREST HOME	AL	013130
36515	CARLTON	AL	014360

Recombination (August 13, 2001)

Required Category

5K – Puerto Rico; no URB input – Match to address with blank URB

Input: 5 CARR 693
DORADO PR 00646

Expected return: 5 CARR 693
DORADO PR 00646-3445

ZIP+4 File

ZIP Code	Prim Low	Prim High	Street Name	Suffix	Post	URB	ZIP+4	Carrier Route	Last Line Key
00646	1	99	CARR 693			BO SALDINERA	2044	C004	V17181
00646	5	9	CARR 693				3445	C005	V17181

Required Category

7B – Multiple field address with split-indicia

Input: 200 REED CREEK
HEIGHTS TRL
HARTWELL GA 30643

Expected return: 200 REED CREEK HEIGHTS TRL
HARTWELL GA 30643-2478

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	Last Line Key
30643	1	999		REED CREEK	PT				
30643	100	999		REED CREEK	TRL				
30643	101	398		REED CREEK HEIGHTS	DR				
30643	100	398		REED CREEK HEIGHTS	TRL		0000-2478	R005	X10597

LACS^{LINK}TM

LACS^{Link}TM is mandatory for CASS only.

LACS^{LINK}TM - Example 1

Input matches to a ZIP+4 record that has the LACS indicator set in ZIP + 4[®]

Input: 205 W YELLOWHAWK
WALLA WALLA WA 99362-8795

Output: 663 YELLOWHAWK ST
WALLA WALLA WA 99362-7724

LACS Return Code: A
LACS^{Link} Indicator: Y

LACS^{LINK}TM - Example 2

Input matches to rural route default record in ZIP + 4[®]

Input: RR 4 BOX 205A
GRENDAL MS 38901-9804

Output: 19 ROSE RD
GRENDAL MS 38901-8381

LACS Return Code: A
LACS^{Link} Indicator: Y

LACS^{LINK}TM - Example 3

No matches to ZIP + 4[®]

Input: 969 TRIM TREE RD
INDIANA PA 15701

Output: 1749 KAUFFMAN RD
INDIANA PA 15701-7835

LACS Return Code: A
LACS^{Link} Indicator: Y

LACS^{LINK}TM

LACS^{LINK}TM - Example 4

No matches to ZIP + 4[®]

Input: 969 TRIMM TREE RD
INDIANA PA 15701

Output: 1749 KAUFFMAN RD
INDIANA PA 15701-7835

LACS Return Code: A
LACS^{Link} Indicator: Y

LACS^{Link}TM Requirements

- Testing for false-positive records
- Email notification of false-positive records

The LACS^{Link} testing will include false positive records. You will be required to email the false positive records to DSF2STOP@USPS.GOV. The subject line should be CASS TEST LACS^{link}. See Exhibit A and Exhibit B for the layout of the email notification.

30 – Character Abbreviated Alias

The new 30 character abbreviated alias that is now part of the city state file will be tested in Cycle J. Software will be allowed to return either the abbreviated alias or the fully spelled out street name.

Example

Input: 6821 N CNTRY HOMES STE 101
SPOKANE WA 99208

Output: 6821 N CNTRY HOMES STE 101
SPOKANE WA 99208-4373

OR

6821 N COUNTRY HOMES STE 101
SPOKANE WA 99208-4373

Magnet Rule (Magnet rule with DPV™ as tie-breaker)

Software may optionally use DPV to make inexact matches to magnet street records. If only one record DPV confirms, a match is allowed to the inexact record

Input: 10 PARK
NEW YORK NY 10016

Output: 10 PARK AVE
NEW YORK NY 10016-4338

ZIP+4 File

ZIP Code	Prim Low	Prim High	Pre Dir	Street Name	Suffix	Post Dir	ZIP+4	Carrier Route	DPV
10016	10	10		PARK	AVE		0000-4338	C199	Y

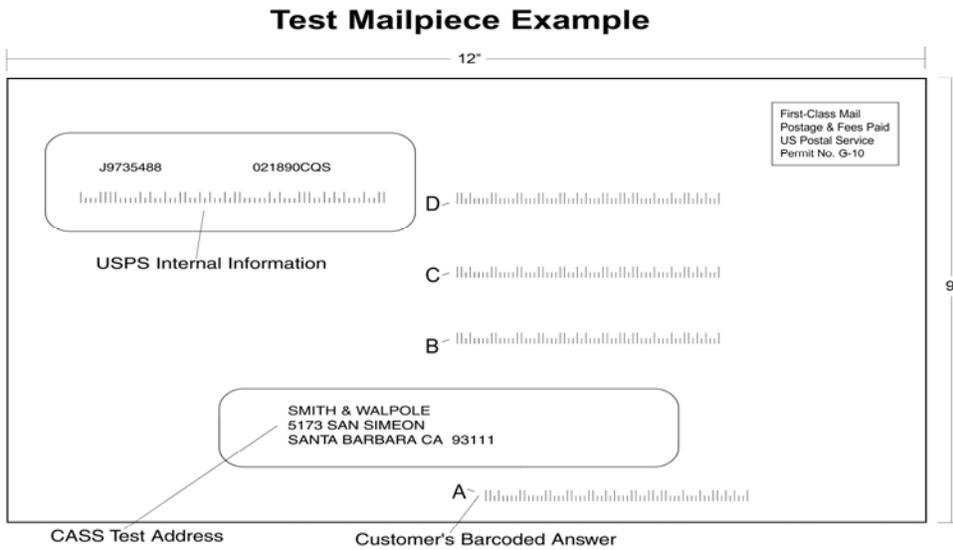
No Platform Waivers

Research has confirmed that different compilers give different answers when processing address lists. Therefore, the CASS Department will require certification for each platform or compiler used pertaining to a specific software product. **If software is required to be recompiled to run on a platform, then the platform must be certified.** Listed below are some examples of the different platforms:

- Windows (all)
 - Unix
 - AS/400
 - MVS
 - IBM Mainframe
 - Solaris 32
 - Solaris 64
 - Linux
- AIX
 - HP/UX
 - OS/390
 - Sun
 - VSE
 - TANDEM
 - Mac OS

MASS™ (Multiline Accuracy Support System)

- Delivery Point Validation
A requirement for MASS when and If it becomes a rate requirement
- Flat Testing example below
9x12 envelopes where the barcode is sprayed



Discussion Items

- The EWS file should be implemented after the ZIP + 4™ process.
- The file structure for Stage II is the same as Stage 1
- It is the Manufacture's responsibility to notify the MASS Department when to release MASS test decks.
- MASS IDs are assigned to the manufactures only.

- Certification fees billed to the customer as follows:
 - CASS-Certified™ customers will be billed based on the number of separate software configurations certified – not the number of Stage II files ordered.
 - No fees will be billed based on platforms
 - The cost of a MASS test deck will be based on the return date of the test deck to the NCSC – not the date the test was ordered.

Fee-Based Certification

The CASS™/MASS™ fee schedule for certification is listed below.

Fee-Based Certification								
	Dec/ Jan	Feb	March	Apr	May	June	July	Aug
CASS Fees	\$200	\$200	\$200	\$500	\$500	\$500	\$500	\$750
MASS (3500) Manufacturer		\$300	\$300	\$500	\$1000	\$1000	\$1500	\$2000
MASS End User (3500)		\$0	\$0	\$0	\$0	\$400	\$500	\$750
MASS (350) Manufacturer		\$50	\$50	\$100	\$250	\$250	\$350	\$500
MASS End User (350)		\$0	\$0	\$0	\$0	\$100	\$150	\$300

CASS Guidelines CD-ROM

All the PIT minutes since 1988 have been consolidated and placed on a CD-ROM. A demo on the contents and delivery of the minutes were presented. A copy of the CD-ROM was enclosed in each partner's packet. No questions were presented.

EXHIBIT A: LICENSE PERFORMANCE REQUIREMENTS LACSLink™ FALSE POSITIVE HEADER RECORD

LACSLink™ FALSE POSITIVE HEADER RECORD

FIELD REFERENCE NUMBERS	FIELD DESCRIPTION	LOGICAL LENGTH	RELATIVE POSITION FROM/THRU	CONTENT NOTES
1	MAILER'S COMPANY NAME	40	01-40	
2	MAILER'S ADDRESS LINE	58	41-98	
3	MAILER'S CITY NAME	28	99-126	
4	MAILER'S STATE NAME	02	127-128	
5	MAILER'S 9DIGIT ZIP	09	129-137	
6	TOTAL RECORDS PROCESSED	09	138-146	
7	TOTAL RECORDS LACSLink MATCHED	09	147-155	
8	FILLER	25	156-180	

EXHIBIT B: LICENSE PERFORMANCE REQUIREMENTS LACSLink™ FALSE POSITIVE RECORD

FIELD REFERENCE NUMBERS	FIELD DESCRIPTION	LOGICAL LENGTH	RELATIVE POSITION FROM/THRU	CONTENT NOTES
1	STREET PRE-DIRECTIONAL	02	01-02	
2	STREET NAME	28	03-30	
3	STREET SUFFIX ABBR	04	31-34	
4	STREET POST-DIRECTIONAL	02	35-36	
5	ADDRESS PRIMARY NUMBER	10	37-46	
6	ADDRESS SECONDARY ABBR	04	47-50	
7	ADDRESS SECONDARY NUMBER	08	51-58	
8	MATCHED ZIP CODE	05	59-63	
9	MATCHED PLUS 4	04	64-67	
10	FILLER	113	68-180	

REFERENCE NUMBERS 1 THROUGH 7 ARE FROM THE INPUT ADDRESS.
REFERENCE NUMBERS 8 THROUGH 9 ARE FROM THE MATCHED RECORDS.

AIS Product Changes

There were some changes to a few of the AIS Products this year. The Address Information System Products Technical Guide will be updated to reflect changes made to file layouts.

ZIP+4 Product

Issues surrounding community identity have been a sore spot for some customers who are not happy with the way the state in their address is represented. The flaw in the ZIP+4 product which caused the reference number 25-State Abbreviation field to be represented incorrectly has been corrected. The field was presenting the ZIP Code of the State that delivers the mail rather than the Geographic State code where the mail is delivered.

- Change to Field Reference Number 25-State Abbreviation
- Return the state of physical location – currently returns ZIP Code State

In March 2004 the product changed to provide the State Abbreviation of the physical location. This new State Abbreviation will be used with reference number 26-County Number and reference number 27-Congressional District Number and also used when ZIP Code boundaries cross state lines.

- State abbreviation used with Fields 26 and 27:County Congressional District
- Used when ZIP Code boundaries cross state Lines and to give more accurate information.

City State Alias File

In March 2004 a new alias type code "A" was created in the city state file. It has been designed to assist matching when delivery address lines exceed 30 characters. These aliases will provide a way to store long street names in shorter spaces. There is an estimated pool of 36,000 street names in 11,500 ZIP Codes that will benefit from this change by providing a standard solution for Address List Systems with space constraints.

Abbreviation aliases will be based on local preferences.

Example: Dr Martin Luther King Junior BLVD
 Austin TX = MLK BLVD
 Chicago IL = King BLVD

New 'Abbreviated' Alias Records

ZIP		Base Street Name				Alias Street Name			Type
55401	W	Rev Dr Martin Luther King	BLVD	NW	W	M L King	BLVD	NW	A
00901		Franklin Delano Roosevelt	AVE	S		F D Roosevelt	AVE	S	A

The alias type indicators are now as follows:

- P = Preferred Street Name
- C = Official Street Name Change
- O = Other
- A = Abbreviated

Seasonal Indicators

In March 2004 there was a new seasonal indicator added to the city state product. Previously seasonality was recorded at the Delivery Point Level. No information was available for the "Season" of occupancy and/or for more than one "Season" possible per ZIP Code. This information will only be available for ZIP Codes that have a seasonal impact and will be maintained by the Delivery Unit responsible for the delivery of this mail. Flags "Y" and "N" have been added to the product to indicate the months of occupancy. The months with "Y" flags indicate month's that mail will be delivered to these ZIP Codes.

- Added records to City State to define the months
- A new record type of "N" was added to the City-State product.
- Added 'Y' to Months of Occupancy-indicates months mail will be delivered to these ZIP Codes
- Delivery Points still marked as Seasonal. Individual addresses are NOT provided
- Address is occupied for all or part of the 'Season'

New Seasonal Records Alternate PLL Values

ZIP	J	F	M	A	M	J	J	A	S	O	N	D
55777	N	N	N	N	Y	Y	Y	Y	N	N	N	N
55797	Y	Y	N	N	N	N	N	N	N	N	Y	Y

Alternative PLL Values

In August 2004 there were changes to the PLL as shown below. Previously there was only one Preferred Last Line key per ZIP Code in the City-State file.

- Multiple mailing names acceptable
- Multiple variations on mailing names are not acceptable.

Example:

- Minneapolis is PLL
- Saint Louis Park Acceptable Name
- St Louis Pk Not Acceptable Name
- But Minneapolis is NOT the Right Choice for addresses with "St Louis Pk"

ZIP	Key	CS Name	Type	PLL Key	PLL Name	Mailing Name
55426	X12345	Minneapolis	P	X12345	Minneapolis	Y
55426	X12346	Mpls	N	X12345	Minneapolis	N
55426	X12347	Saint Louis Park	B	X12345	Minneapolis	Y
55426	X12348	St Louis Park	N	X12345	Minneapolis	N
55426	X12349	St Louis Pk	N	X12345	Minneapolis	N

Alternate variations of mailing names have been added to represent common community names. This is not scheduled to be included in the CASS™ test for Cycle I.

ZIP	Key	CS Name	Type	PLL Key	PLL Name	Mailing Name
55426	X12345	Minneapolis	P	X12345	Minneapolis	Y
55426	X12346	Mpls	N	X12345	Minneapolis	N
55426	X12347	Saint Louis Park	B	X12345	Minneapolis	Y
55426	X12348	St Louis Park	N	X12347	Saint Louis Park	N
55426	X12349	St Louis Pk	N	X12347	Saint Louis Park	N

DPV™ (Delivery Point Validation) Product

In February 2004 the Postal Service added another table to the DPV product called the No-Stat Table. This table is used to identify deliveries that are not valid for CDS pre-processing. Previously there was no data available to identify valid physical addresses that are not delivered by the USPS such as “gated communities”. Some gated communities will be provided to CDS to produce mail pieces for each address to be delivered by a carrier to a physical address. The non-city deliveries (small town deliveries) are expected to receive mail at post office boxes. Unlike “gated communities”, non-city deliveries do have valid mailing addresses other than a post office box. This table is currently available for DPV/DSF2 licensees. The use of this table is optional for use in the CASS cycle J. If you use the table, you must return the correct answer.

The Postal Service also added new foot note codes for Military, General Delivery and Uniques:
F1 – Military G1 – General Delivery U1 – Unique

As we stated there would be discussion on the flags returned with the foot note codes, the result of that discussion was, move blanks to the flags. No default flags will be allowed. When a match is found to a Military, General Delivery or a Unique, move “Y” to the DPV return code. As stated above move blanks to all other flags. In these cases, a ZIP + 4 match is considered to be equivalent to a delivery point match.

There was an increase in the False Positive Record layout for DPV and DSF2. The record length of “Number of ZIP Codes on File” increased from 4 to 5 increasing the record length of the report file from 179 to 180.

The “Flat File” Version of DPV: As of September 15, 2004 the specifications have been completed and we are ready for product fulfillment. The “Flat File” Version of DPV is intended to address memory issues on “less than optimal” systems.

In September 2004 the Postal Service added a table for seasonal deliveries for ‘E’ Educational records. The assumption will be made that in summer months these are vacant. These flags are set at the delivery level and City State flags will not apply to these deliveries. The value appeared in the DPF data on December 29, 2003. The use of this table is optional for use in the CASS cycle J. If you use the table, you must return the correct answer.

Discussion Items

AMS Customer Issues

It was requested that Address Quality post AMS issues for the customers on the web. We will be creating an area on RIBBS. Address Quality will place all notifications for AMS data at this location.
<http://ribbs.usps.gov/files/Addressing/Notifications>

The table sizes of all the hash tables are located at the below sites:
http://ribbs.usps.gov/files/DSF2/DSF2INFO/DSF2_TABLE_SIZES.DOC
http://ribbs.usps.gov/files/DPV/DPVINFO/DPV_TABLE_SIZES.DOC

Universal Postal Union (UPU) S42 International Addressing Standards and Address Data Interchange Specification (ADIS) Opportunities and Benefits

The POST*Code project team “is in the process of developing a standard for international postal address elements and structures, which identifies and describes all international address elements”.

“Following a series of tests, the standard will be adapted as necessary, and then gradually supplemented with descriptions of the address structures in natural language and XML of all Universal Postal Union (UPU) member countries.”

October 14, 2002

Key Participants

- UPU Post*Code project team
- European CEN Technical Committee 331
- UPU DMAB Address Management Project Team
- USPS International Address Template Working Group (IATWG)
- IDEAlliance Address Data Interchange Specification (ADIS) working group

Participating Countries (To Date)

- Australia
- Brazil
- Chile
- Finland
- France
- Germany
- Great Britain
- Japan
- Morocco
- Netherlands
- New Zealand
- Portugal
- Sweden
- United States of America
- Venezuela

Advantages of Extensible Markup Language (XML)

- XML is defined by the World Wide Web Consortium (W3C)
- XML is used on the Internet and for transferring data in computer systems
- XML incorporates UNICODE and support many alphabets
- XML W3C schemas offer strong data typing and validation capabilities
- XML W3C schemas correlate well with programming language constructs

Address Elements

A postal address element is a “basic entity of a postal address that has a well defined meaning, has significance for customer or postal processing purposes and cannot usefully be divided into smaller units for exchange or printing purposes”.

From UPU document “International Postal Address Components and Templates”

- Basic units of postal addresses
- Standard based on element list and definitions provided by CEN TC 331
- Over fifty elements have been defined
- Includes name and address elements
- Does not include mail production elements
- POST*Code group considers amendments if needed

Example: UPU Address Elements

- Street Number or Plot
- Thoroughfare Name
- Thoroughfare Type
- Delivery Service Type
- Delivery Service Indicator
- Town
- Region
- Postcode

Address Templates

“An address template states how an address is to be written; in particular, it shows the order in which address elements are to appear, distinguishes between mandatory and optional elements and provides rendition instructions.”

“Each country may have its own characteristic address templates.”

- Address templates reflect address types or patterns
- Country based templates will be defined
 - Using natural language template (NLT) notation
 - Postal Address Template Description Language (PATDL)
- Language (s) of presentation must be specified
- A template is a sequential ordering of lines and elements
- Address format varies if mailing is internal vs. external
- Usable for single country applications without external knowledge
- Templates need to support variations in formats
 - Support “trigger conditions”
 - Support user preference

Postal Address Template Description Language (PATDL)

- PATDL Version 2.2 is included in UPU standard as a way to define templates in XML
- Does not define format for address data, contains only address metadata
- Constitutes a link between the UPU standard and the IDEAlliance ADIS standard for business mail
- Includes integrated rendition instructions for final presentation of address
- Supports integrated tables for validation and abbreviation of element data

Supports multiple code sets or natural language XML tags

- UPU elements, sub-types and codes
- ADIS elements and codes
- OASIS xNAL elements
- ECCMA codes
- Other formats from defined sources

Supports user preference and job variables

Implements conditional logic for conditional selection and branching

Enables multiple sub-templates to be combined into one master address template per country

Rendition Instructions

“Rendition instructions define how address elements must be rendered, or optionally may be rendered, when printed on a mail piece. They reflect rules for properly formatting addresses, including punctuation, spacing, fonts, the format of the postcode, locations for identifying marks and codes ,abbreviations, and techniques for shortening and reorganizing components to ensure deliverability when there are constraints on available label space.”

Rendition Instructions Example

Example of US Rendition Instructions:

- City = “Chicago” = S42 town
- State = “Illinois” = S42 region
- ZIP Code = “60625” = S42 Primary Postcode
- ZIP Code Addendum = “3806” = S42 Secondary Postcode
- State abbreviations should be used
- State abbreviations should be capitalized
- Two spaces recommended after State
- Hyphen needed between parts of ZIP Code
- Hyphen only permitted if both parts present
- Result: “Chicago IL 60625-3806”

Test Plan

- Identify address types within each country
- Select 50 or more sample addresses of each type
- Identify the address elements individually
- Utilized all address elements found in the country
- Include name elements following privacy restrictions
- Define natural language and XML templates
- Specify trigger conditions when multiple branches defined
- Define result of passing data elements through templates
- If there is a delivery point database:
Compare results to know delivery point formats
Otherwise: Evaluation by subject matter experts
Note that this procedure can be replicated as needed

Milestones and Next Steps

- S42-3 "International Postal Address Components and Templates" approved 3 February 2004
- S42-4 to be submitted to UPU Standards Board on 6 July 2004
- Templates will be developed in natural language and XML for more UPU member countries
- IDEAlliance ADIS 04-1 to be published after final editorial modifications
- ADIS is an implementation of UPU S42 for domestic and international business mail
- ADIS defines an XML format for names and addresses as well as related information.

ADIS Opportunities and Benefits

- Make UPU standard definition of address elements and templates available for all postal customers
 - Single list of elements worldwide
 - Useful for database design
 - Useful for disassembly of addresses
 - Templates for each country
 - Mail formatted per specifications of each Post
 - Useful as part of validation process
- This process has developed some momentum in Europe and North America
- Customer databases maybe redesigned to permanently retain address elements
 - Typically customers retain information line-by-line today
 - This causes difficulty in validation and quality control
 - Missing elements are hard to detect
 - Elements must be parsed over and over again
 - Information may be truncated during presentation
- Need for transfer of data to legacy systems

ADIS Opportunities and Benefits

- Address formatting will be directly derived from stored data, templates and rendition instructions for any needed format
 - User may specify style preferences and label block size
 - After that, formatting will be automatic
 - Rendition will produce the most deliverable address subject to space constraints
- Larger companies have multiple ways to do this
- Smaller companies can use a turnkey solution
- Economics of direct mail will be more advantageous
 - Less work for the Posts delivering mail
 - Better response rates from accurate addressing
 - Leads to increased mail volume for Posts
 - Fewer problems with return of items
 - Posts will compete better vs. other modes of communication
- Need direct connection to a address validation to make this advantage clear
- Cost-based rates for addressing will help
- Reduction in undeliverable mail and returned mail will benefit the Post
 - Some erroneous mail will never be sent
 - Fewer duplicates will be mailed
 - Question remains: what if recipient has moved?
 - Questions remains: how to make returns more efficient?
- International electronic nixie and COA services needed to be developed

Permanent Parsing

- Address parsed into elements when first encountered
- Coding process is reduced from parsing and matching to matching only
- Simpler and more reliable de-duplication
- Can easily identify and exchange missing components
- Once coded, only need to refresh coding at intervals
- Parsing problems shown in earlier GCA study to account for two-thirds of coding failures

Automatic Formatting

- Place full and uncompromisingly rich data into database
- Use UPU templates and trigger conditions
- Set up rendition instructions for output format
- Create output file in ADIS format
- Addresses will be the best possible for the specified conditions
- All defects can be measured as long as there is a delivery point database to define completeness and correctness

Move Update Management

- Validate against databases of delivery points to allow mailers to maintain complete and correct addresses
- Use change of address systems and procedures to the best effect since matching problems will be minimized
- Document move update performance and methods used on an address by address basis to secure USPS discounts
- Perform move update process as late as possible right up until the time of mailing
- Generate Mail.dat and ADIS files and go to production

Composite Mail Pieces

- Periodical “firm bundles” have reduced postage
- Standard Mail and Bound Printed Matter composite mail pieces have reduced postage
- The term “firm bundle” is misleading
- A more accurate term is “delivery point bundle”
- These bundles can be created when addresses are known to be complete and correct delivery point matches
- Multiple magazines can be polywrapped into a single piece if schedules match
- Several non-competing catalogs make one composite mail piece at reduced postage

Making Mail Intelligent

- USPS developing plans for future mail to identify sender and receiver and include information about itself
- “Intelligent mail® “ bar codes will not carry all relevant data
- Example: 31 characters in 4-state code
- Even two-dimensional codes need updated or amended data
- Some information in human readable form
- Some information in the barcode
- Some information accessible by unique key in barcode
- ADIS supports any variation of the above three scenarios

How to Improve MERLIN

- MERLIN moving into address quality area but restricted to limited sample
- Like presort and barcode quality errors, address quality deficiencies are not randomly distributed
- MERLIN lets some errors through and by extrapolation, penalizes others too much
- Portable electronic standardized file sets are a solution
- Mail.dat in MERLIN would make presort evaluation more accurate and fair
- ADIS in MERLIN would make address quality evaluation more accurate and fair

MTAC Work Group #89

The first meeting for the newly organized CASS Work Group #89 was held on August 26, 2004. The goal is to evaluate the CASS Programs. Some of the items that were in Work Group #86 and #86 will be rolled over to Work Group #89.

Introduction of LACS^{Link™} (Locatable Address Conversion System)

LACS^{Link™} provides a new address when an address has been converted due to USPS[®] changes.

Rural Box Addressing

Most records in LACS reflect changes from rural box addressing to street-style addressing for E911 conversions.

Example

Old Address RR 1 Box 127A
New Address 17255 Scenic Rd

Street Style Addresses

Some records in LACS represent changes to street-style addresses.

Example

Old Address 905 France Ave
New Address 1125 Freedom Dr

PO Box Renumbering

Some LACS records reflect PO Box renumbering

Example

Old Address PO Box 123
New Address PO Box 555123

- LACS data has been gathered since 1988
- In 1994, LACS input was enabled in AMS
- In 1995, application improvements lead to increased LACS input from field offices.

911 Conversions

1996 to 2004

- 2.8 million (60%) of rural box addresses converted to street addresses.
- 300K – 400K per year
- 1.9M rural box addresses remain

Rural Address Matching

NCOA Stats Show:

- 6.7 percent of input addresses match to 'R' type ZIP + 4® records
- 40 percent of matches to 'R' type records fail to delivery point confirm.

LACS^{Link}TM

- ZIP + 4® file displays the LACS indicator for Old LACS records as long as the records live in the AMS database.
- CASS CertifiedTM software is required to recognize the LACS indicator in the ZIP + 4 file.
- LACS processing of address lists have been a function of NCOA.
- Thirteen NCOA licensees are authorized to process addresses for LACS conversion.
- LACS^{Link} will provide LACS data as a secure hash table.
- LACS^{Link} will allow the USPS® to distribute LACS address conversion information as separate product.
- The input to the LACS lookup is a display of the address, 50 characters in length, and a five-digit ZIP CodeTM.
- The address must be in standardized unparsed format, but not necessarily ZIP + 4® coded.
- Keeping in mind that a change in one letter or space creates a different SHA value, the standardized address and numbers that are to be an input must exactly match the SHA value that was SHA'd to make the list.
- To aid in the standardizing of street style addresses a table will be provided that will include a 5 digit ZIP CodeTM and the Indicia (Pre Directional, Street Name, Suffix, and Post Directional) as it appears in the USPS® LACS database.
- If the process verifies that the input address exists in the LACS table, the 11-digit ZIP CodeTM + a hint byte of the new address will be returned.
- The 11-digit look-up table and the hint byte table will provide the new address.

System Requirements

5 LACSLinkTM data tables 33MB each

Binary Hash Table 16MB

Subtotal **181MB**

Street Name Table 4MB

1 Hint Byte table 33MB

RV9 table 112MB (max)

Total **330MB**

Match to "Exact" Non-LACS Record

Input Address: RR1 Box 28
Bird Island MN 55310

ZIP + 4® Match

Rec

Type	ZIP	CRID	Street	Low	High	Addon	LACS
R	55310	R001	RR1	26	28	9703	

LACS^{Link™}: Not needed

LACS Indicated Record Match

Input Address: RRI Box 75
Fountain Valley IA 50505

ZIP + 4® Match

Rec

Type	ZIP	CRID	Street	Low	High	Addon	LACS
R	50505	R001	RR1	75	76	9703	L

LACS^{Link™}: Yes

Rural Default Match

Input Address: RRI Box 83A
Corkys Hollow TN 38224

ZIP + 4® Match

Rec

Type	ZIP	CRID	Street	Low	High	Addon	LACS
R	38224	R001	RR1			9801	

LACS^{Link™}: Yes

ZIP + 4® Non-Match

Input Address: 1705 S Jordan Rd
Briggs TN 38405

ZIP + 4 Match: NO

Street Name Table: 38405 S Jordan Rd

LACS^{Link™}: YES

“Fuzzy” Match to Street Name Table

Input Address: 1708 S Jordan Dr
Briggs TN 38405

ZIP + 4® Match: NO

Street Name Table: 38405 S Jordan Rd

LACSLink™: YES

No Match to RR, HC, PO Box

Input Address: RR 11
Briggs TN 38405

ZIP + 4® Match: NO

Street Name Table: 38405 RR1

LACSLink™: NO

Timetable

- Current LACS licensees may continue to receive LACS data until 11-30-2005
- NCOALink™ full service licensees not currently Lacing must certify for LACSLink™ to process address conversion.
- All CASS Certified™ software to be LACSLink enabled by 7-31-2005.