

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

CERTIFICATION PROCEDURES

The following material describes the necessary steps of the certification process to qualify for a license to the DSF² Licensed Service. All of the necessary information and documents to complete all steps of the certification process are included. This allows each potential Licensee to develop a complete understanding of the certification process and provides the opportunity for potential Licensees to work on all steps simultaneously if desired. However, please be advised that steps are sequential, each step must be submitted in its proper sequence. *The submission of all steps simultaneously is prohibited.* It is strongly recommended that potential Licensees acquire the Step 1 approval before expending resources on subsequent requirements.

All submissions must be made to the following address:

DSF² DEPARTMENT
UNITED STATES POSTAL SERVICE
225 N HUMPHREYS BLVD STE 501
MEMPHIS TN 38188-1001
FAX: 650-577-5773

Step 1. Application and Self-Certification Statement Approval

The following, more detailed, documentation must be completed, submitted and approved by the USPS:

- Application
- Self-Certification Statement
- Confidentiality Statement
- Non-Competitive Statement

Upon receipt of the official written approval from the USPS of successful completion of Step 1, applicants will receive the Interface Developer Guide and Stage I files and may progress to Step 2.

Step 2. Documentation Requirements

The following, more detailed, documentation must be completed, submitted and approved by the USPS:

- Technical Proposal
- Security Documentation
- Key Personnel Form
- Equipment Information

Upon receipt of the official written approval from the USPS of successful completion of Step 2, applicants may progress to Step 3.

LICENSEE PERFORMANCE REQUIREMENTS DSF²® LICENSED SERVICE

Step 3. Stage I Interface Development

A Stage I File will be issued along with an Interface Developer Guide (IDG) to prospective Licensees to facilitate their interface development. Sample code is available to assist in writing the interface. The interface must adhere to the requirements set forth in the Licensee Performance Requirements, with all footnotes, security requirements, reports, and statistical information. Upon receipt of the official written approval from USPS after submission of a completed test run with accompanying required data, the potential licensee may request the Certification Test.

Step 4. DSF² Testing & Certification

A written request must be submitted to USPS indicating that the organization is ready to perform a DSF²/CASS certification test. The USPS will send a test file to the organization. (While DSF² testing will usually occur remotely, USPS reserves the right to perform testing on-site.)

The following items are tested in Step 4:

- Ability to process test files and ZIP +4[®] Code according to the CASS standard
- Ability to validate addresses per DSF² requirements
- Ability to produce an output file with appended flags and footnotes
- Ability to identify the "DPV Stop Processing" address (Seed)
- Ability to submit all reports in proper format
- Ability to produce a proper statistical data file.
- Understanding of administrative requirements which includes processing the certification test and submitting the proper paper work

Step 5. Execution of License

Upon successful completion of Step 4, an approval letter and a DSF² License Agreement will be sent to the organization. **The DSF² License Agreement must be signed by an officer who possesses legal authority to sign on behalf of the company, firm, or organization.** The signed, original agreement must then be returned to the USPS along with the applicable payment in accordance with paragraph 8.1 of the License Agreement. Once the signed license is received, it will be forwarded for signature. At that time, a copy of the signed license agreement will be sent to the new DSF² licensee and the USPS will grant electronic access to the monthly product updates via Electronic Product Fulfillment.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Certification Procedure

Acceptable Uses and Licensee Prerequisites

This section is intended to clarify allowable uses of the DSF² Licensed Service. As stated in Section 1.1 of the DSF² License Agreement, “The sole purpose of this license is to provide Licensee with access to Licensed Materials that will be used by and upon Licensee’s computer system to process address lists for either the Licensee or the Licensee’s customer in preparation of entering mail for delivery by the United States Postal Service.”

Acceptable Uses:

- **Service bureau based address hygiene**
- **Validate the delivery address of mailing lists**
- **Produce sequencing for mail lists**
- **Provide address attributes**
- **In conjunction with CASS Certified address matching software; provide standardized address, 5-digit ZIP Code, the ZIP + 4 Code add-on, the 2-digit Delivery Point code, and ZIP + 4 attribute information**
- **All processing activities must be tied directly to mailpiece generation for delivery by the USPS**

Prerequisites of Obtaining a DSF² License

- **Potential Licensees must be in the business of, or planning to be in the business of, providing address verification and list processing services**
- **Potential Licensees must publicly offer processing services to external customers**
- **Potential Licensees must not be competitors or the parent, subsidiary or affiliate of a competitor of the USPS in the delivery of mailable matter**

Non Disclosure of Address Information:

The DSF² Licensed Service processing requires the potential Licensee to have access to address information (i.e. addresses and return addresses) that appear on mailpieces. To ensure the confidentiality of this address information, except as specifically permitted by the USPS, no supplier or subcontractor, and no employee or former employee of any supplier or subcontractor may, at any time, during or after the period of this license, disclose to any third party any address information obtained in the performance of this license. This license does not give the supplier proprietary interest in any address information, and the supplier’s right to have, use, and disclose address information is restricted by the license. The Licensee agrees to control and restrict access to address information to persons who need it to perform work under this license and prohibit the unauthorized reproduction of this information.

This document does not negate or supersede existing requirements as defined in the DSF² License Agreement.

DSF² Licensed Service providers must ensure that when requested to provide said licensed service, the acceptable uses listed above are clearly understood by potential customers.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

**Certification Procedures
System Design and Implementation Suggestions**

Pre-Development Considerations

The implementation and utilization of DSF² to validate address data either for internal or client processing is a big step in any organization. The following information should be considered in developing the implementation plan:

- Design the interface system with appropriate hardware that will meet your business needs with regards to processing speeds, connectivity to other platforms or data streams and operational controls.
- Determine the impact, if any, this system may have with existing processing.
- Provide a copy of the License Agreement to your legal department for review. Per the License Agreement: **“This Agreement may not be altered, amended, or modified except by a written instrument signed by authorized representatives of USPS and Licensee.”**
- In processing any address list data, regardless of origin, it is a good idea for the base file to contain flags/fields that provide the necessary information on origin of the address and when the record was updated. In conjunction with other processes, circumstances may occur in which automated updating of certain base records may need to be prohibited and/or diverted to a different process. The utilization of these flags/fields or other fields will facilitate in the systemic decision making.
- Understand all of the components of the DSF² datasets, including the different questions about addresses, to insure the base file is being updated properly. The publications below are recommended for reference material and are included in the Publications section of this document:

“Postal Addressing Standards” (Publication 28)
“Address Information System Products Technical Guide”

- It is recommended that a gradual implementation plan be utilized to ensure the system is performing as designed.

LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE

STEP 1
DSF² Licensed Service Provider
Application

Please Print:

Licensee Name: _____

Licensee Address: _____

NAICS: _____

Telephone No.: _____ Fax No.: _____

Contact Name: _____

Parent Company (if applicable): _____

Terms and Conditions of Application for License

1. The DSF² technology, as stated in the License Agreement, may only be used to process address lists for address hygiene, address attribute assignment, and address sequencing services on behalf of either Licensee or Licensee's customers in preparation of submitting mailpieces to the United States Postal Service for delivery.
2. Prior to consideration for a DSF² license, a potential licensee must demonstrate the capability and performance of providing address list processing service to a degree that warrants, in the opinion of the USPS, that licensing of the DSF² technology to the applicant is in the best interest of the USPS. **The applicant must submit the Self-Certification Statement, along with this application** to enable USPS to make this determination. This information should include a description of the applicant's business and its mailing-related functions, annual USPS mailing list preparation and/or mail volumes, and its experience in this field. Refer to the page titled "Self-Certification Statement" for the minimum specific information that must be provided.
3. Prior to granting a DSF² license, a potential licensee must demonstrate, in accordance with Section 4.0 of the Licensee Performance Requirements, that the applicant has obtained (purchased, leased, or created) an interface system for the DSF² technology system that has been USPS-certified as DSF² capable.
4. No DSF² license will be granted to the applicant prior to USPS acceptance testing and approval of the applicant's specific DSF² interface.

I hereby affirm that I have read and fully understand the terms and conditions listed above. I, my company, and/or firm agree to meet these terms and conditions as a prerequisite to applying for or obtaining a USPS DSF² License Agreement. I affirm that I am an officer of the company, firm or organization and that I possess all necessary legal authority to sign on behalf of the company, firm, or organization.

Name (please print): _____

Title: _____

Signature: _____ Date: _____

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 1- Application

CONFIDENTIALITY STATEMENT

All material supplied in connection with the application for and use of DSF² Licensed Service contains trade secrets and/or confidential technical, commercial, or other information not generally available to the public. This document, and all other material provided in connection with DSF² Licensed Service technology, and the data and information contained therein shall not be used, duplicated or disclosed to third parties, in whole or in part, for any purpose other than for evaluation by the recipient, without the prior express written consent of the United States Postal Service. For the purposes of evaluation, the recipient is authorized to disclose the data or information provided in connection with DSF² Licensed Service technology only to those persons within the recipient's organization who have a reasonable need to know the same. Those persons must be informed of and agree in writing to abide by the restrictions on duplication, disclosure, and use of all material, data, or information described herein.

I hereby affirm that I have read and fully understand the terms and conditions listed above. I, my company, and/or firm agree to meet these terms and conditions as a prerequisite to using the enclosed product. I, my company, and/or firm further agree to continue to abide by this Confidentiality Statement whether or not the USPS awards a DSF² License to me, my company, and/or firm. This Confidentiality Statement shall not be superseded by the award of or entry into a DSF² License or any other agreement with the United States Postal Service, unless such agreement specifically refers to this Confidentiality Statement. I affirm that I am an officer of the company, firm or organization and that I possess all necessary legal authority to sign on behalf of the company, firm, or organization.

Product Name DSF²

Company Name (please print): _____

Name (please print): _____

Title: _____

Signature: _____

Date: _____

Please sign and return to:

DSF² LICENSING DEPARTMENT
NATIONAL CUSTOMER SUPPORT CENTER
UNITED STATES POSTAL SERVICE
225 HUMPHREYS BLVD STE 501
MEMPHIS TN 38188-1001
FAX: 650-577-5773

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 1- Application

DECLARATION OF NON- COMPETITIVE STATUS

This Declaration is in accordance with paragraph 25.1 of the DSF² License Agreement, which states:

No delivery-services competitor (including any parent, subsidiary or affiliate of such competitor) of the USPS, including any domestic or foreign corporation that provides delivery services, any foreign postal administration or any foreign government agency that provides delivery services, or any domestic subsidiaries of any foreign corporation, foreign postal administration, or foreign government that provides delivery services may be a licensee under this Agreement. In addition, no licensee under this Agreement may permit any delivery-services competitor (including any parent, subsidiary or affiliate of such competitor) of the USPS, including any domestic or foreign corporation, any domestic subsidiaries of any foreign corporation or foreign postal administration, or any foreign government to become a sublicensee or subcontractor or affiliate in conjunction with the fulfillment of this License.

Applicant licensees must herein declare that they are not a delivery-service competitor (or the parent, subsidiary or affiliate of a competitor) of the USPS.

Declaration of Non-Competitive Status:

My organization does not now, nor does it have plans to engage in any activity that effects the delivery of mailable matter outside of the U.S. Mail and I certify that neither my organization nor its parent or any of its subsidiary or affiliate organizations engage in or plan to engage in the business of delivering mailable matter outside of the U.S. Mail.

I hereby affirm that I have read and fully understand the Declaration of Non-Competitive Status requirement stated above and I affirm that neither my organization nor any of its subsidiary or affiliate organizations engage in the business of delivering mailable matter outside of the U.S. Mail. I also affirm that I am an officer of the company, firm or organization and that I possess all necessary legal authority to sign on behalf of the company, firm, or organization.

Product Name: DSF²

Company Name (please print): _____

Name (please print): _____

Title: _____

Signature: _____ Date: _____

Please sign and return to:

DSF² LICENSING DEPARTMENT
NATIONAL CUSTOMER SUPPORT CENTER
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**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

STEP 1-Application

**DSF² Licensed Service
Self-Certification Statements**

The following provides clarification and specifics for Item 2 of the Application. This material must be provided for evaluation along with the Application.

1. A brief narrative describing the nature of the applicant's business, with emphasis on its mailing-related functions and experience in this business.
2. A description of how the applicant plans to utilize DSF² technology as part of its business or service offering.
3. A statement of the applicant's annual mailing list preparation volume that will be processed by DSF² technology both for the applicant and its commercial customers, if applicable (estimated number of mailings and total of address records processed).
4. A statement of the applicant's estimated annual mailing volume (number of pieces) both for itself and its commercial customers, if applicable.

These items constitute the minimum information requirements. If applicants wish to provide additional information, they are welcome to do so. After review of the provided information, the USPS will notify the applicant in writing of the acceptance or rejection of its license application. When approved, the applicant will be required to submit a complete technical proposal and management approach as part of Step 2.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 2- Documentation

**LICENSEE PROPOSAL
LICENSEE SELECTION PROCESS**

Each applicant must submit a technical proposal that describes the applicant's proposed approach to using DSF². Each technical proposal will be evaluated and the applicant will be notified as to its acceptability. Applicants are advised to submit proposals that are fully and clearly acceptable without need for additional explanation or information.

The Postal Service will make a final determination as to whether a proposal is acceptable or unacceptable solely on the basis of the proposal as submitted. The applicant will not be permitted to proceed to the development and testing stage without acceptance of applicant's proposal.

The following evaluation factors will be used in the evaluation of the proposals:

EVALUATION FACTORS

TECHNICAL PROPOSALS - The technical review and analysis will be based upon both an evaluation of the capabilities indicated by each proponent to understand and satisfy the performance requirements and upon the ability of the applicant to demonstrate that it is currently operating a system(s) of similar scope, requiring similar technology, and has the management capability, marketing ability, and technical staff to accomplish the USPS requirements outlined in this agreement.

Applicants may be required to perform a functional demonstration within two weeks after submission of their technical proposals for any current system technologies identified as pre-existing capabilities. However, the Postal Service may determine the acceptability or non-acceptability of an individual technical proposal without requesting a functional demonstration.

The criteria itemized herein will be used to rank each technical proposal:

1. **ORGANIZATIONAL CAPABILITY**
 - A. Company experiences in similar or related fields and systems
 - B. Evidence of sound efficient organization and management practices

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

2. DEMONSTRATED ABILITY

- A. Current system description*
- B. Facility and facility management
- C. Personnel qualifications
- D. System availability
- E. Retrieval capability
- F. Maintenance support and capabilities
- G. Customer billing and fulfillment tracking capabilities
- H. Marketing capabilities (description of approach to best utilize the DSF² technology)
- I. Security

3. TECHNICAL/MANAGEMENT APPROACH

- A. Performance schedule
- B. Staffing management
- C. Software, including
 - 1. Available software
 - 2. Software development capability
 - 3. Software enhancement management
 - 4. File or database, file or database design, and access techniques
 - 5. Database backup and technique
- D. Implementation Plan
- E. Personnel training
- F. Hardware and hardware capabilities
- G. Reports and documentation
- H. Quality control
- I. Security

* A functional demonstration may be required of any applicant. If a demonstration is performed it will be used in support of the current system description requested in evaluation factor 2A.

Applicants found to submit acceptable proposals will be invited to participate in Step 3 of the DSF² licensing process.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

TECHNICAL PROPOSAL INSTRUCTIONS

1.0 GENERAL

- 1.1** These instructions prescribe the format of proposals and describe the approach for the development and presentation of proposal data. They are designed to ensure the submission of information essential to the understanding and comprehensive evaluation of proposals. There is no intent to limit the contents of proposals. The instructions permit the inclusion of any additional data or information an applicant deems pertinent.

Any proposal that is ambiguous as to the applicant's intent or commitments may be judged unacceptable without the benefit of discussions.

- 1.2** The applicant must set forth in detail the technical and management plans by which it intends to satisfy all performance requirements. The applicant must discuss current capabilities and demonstrated abilities as well as the technical/management approach that will be used to satisfy the USPS requirement.

1.3 DEMONSTRATED EXPERIENCE

The applicant shall have current experience in, or a comprehensive business plan for, performing address-matching services, to include address matching, ZIP + 4 Coding and address standardization. The technical proposal shall describe the applicant's current experience in, or business plan for, providing comparable address hygiene services. Upon request, the applicant shall provide a demonstration of any services described in the technical proposal. The description and demonstration should be designed to show applicability to specific USPS requirements contained in the attached Licensee Performance Requirements. They should stress the limits of the system in terms of database size, number of accesses per second, and the ability to meet service commitments outlined in the Licensee Performance Requirements. Current experience in handling large numbers of mailing address lists, accessing large databases and answering inquiries is required. The proposal must also stress current marketing ability and future marketing strategies for the DSF² Licensed Service.

The proposal shall address all Licensee Performance Requirements. These plans must be specific and complete. The applicant, in the technical and management plan, should present the information necessary to provide a basis for the evaluation by the USPS of the applicant's technical capabilities. The proposal will be evaluated in light of the material and substantiating evidence presented in the proposal and not on the basis of what is inferred.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

1.4 Elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal are not necessary.

1.5 The Technical/Management Proposal(s) shall be divided into the following three sections:

<u>SECTION</u>	<u>TITLE</u>
I	ORGANIZATIONAL CAPABILITY
II	DEMONSTRATED ABILITY
III	TECHNICAL/MANAGEMENT APPROACH

2.0 SPECIFIC PROPOSAL INSTRUCTIONS

2.1 The Technical/Management proposal shall be directly responsive to the requirements contained in the Licensee Performance Requirements.

2.2 Applicants shall provide a complete explanation of every aspect of their proposal. They must include their specific experience and expertise in each area and how they relate to the performance requirements. Special attention must be placed on what equipment, software, and training materials are ready now and what will have to be developed.

2.3 The proposal shall include the overall technical and management plan, approach, control and schedule for accomplishing the project work, resumes of key personnel, and an in-depth presentation in the following areas.

- a. Fully describe the method and approach to satisfying the total system requirements as defined in the Licensee Performance Requirements.
- b. Describe the applicant's experience or business plan in managing similar address correction systems, and managing and scheduling operations, equipment and supervision to meet the fluctuations in volume that are anticipated in a system of this scope.
- c. Describe all software packages currently available to be used to meet the USPS requirements; describe those that will have to be developed or procured by the applicant to satisfy the USPS requirements.
- d. Based on the required system characteristics, develop a model of the expected daily arrival of subscriber lists and determine the number of hours needed for computer matching. Compare the projected requirement against currently available capability and describe differences. If there are differences, describe procedures and time frames necessary to expand current capabilities to match the requirement.
- e. Provide staffing levels of line management and project technical support staff. Provide

LICENSEE PERFORMANCE REQUIREMENTS
DSF² LICENSED SERVICE

training requirements schedule, future staffing levels, and discuss your capabilities at adjusting staffing levels through manual or computer models.

- f. Computerized Retrieval System--Completely describe this system including:
 - 1. Size and capabilities of the computer hardware
 - 2. Matching speed of existing CASS-certified software
 - 3. System redundancy
 - 4. Maintenance support capabilities, software and hardware.
 - 5. Directory (files) size, structure and access technique as well as average and maximum access time.
 - 6. Sophistication of the retrieval software
- g. Provide a plan of how the major parts of the system will be assembled. Include plans for systems test before operational date.
- h. Describe in detail all facilities, security systems, hardware, communications equipment and lines, computers, terminal equipment, etc. that will be utilized in the satisfaction of the USPS requirement.
- i. Define any techniques that may be employed to enhance meeting the system performance requirements with particular emphasis on retrieval techniques.
- j. Describe the methodology and time requirements for processing updates provided by the USPS to the DSF² data sets, and capabilities to support modifications that may occur in the formats of the files provided by the USPS.
- k. Describe methods and abilities to meet the DSF² reporting requirements described in the Licensee Performance Requirements. Indicate if the requested information is a currently available by-product of the equipment and computer programs presently available to the applicant or, if they represent a development effort, the estimated time to complete the development effort.
- l. Describe the capabilities that will be demonstrated if the applicant is requested to provide a Functional Demonstration of current systems for the USPS. Provide information on the specific application(s) that will be demonstrated, the significance and applicability of the selected demonstration to the USPS requirement, and all the technical detail that will assist the USPS evaluation team in assessing the Functional Demonstration.
- m. Discuss any potential problem areas that may be encountered in meeting the stated requirements.
- n. Describe the means by which corporate management will ensure that all reports are complete, accurate, and are delivered on schedule, as well as the quality control procedures and means that corporate management will provide to assure that systems performance standards are maintained.

LICENSEE PERFORMANCE REQUIREMENTS
DSF^{2®} LICENSED SERVICE

- o. Describe past performance and experience including:
 - 1. List government and commercial contracts performed in the past three years or currently in negotiation or corporate projects involving work in the address matching field, showing each contract number, government agency and address, and commercial agency organization and address. For each contract, include a description of the type of contract, brief description of the work and dollar amount.
 - 2. For each contract in (p.1) above, give record of contract completion and performance as against contract completion date and performance criteria at time of entering contract, giving explanations for completion delays and performance variances.
 - 3. Identify and explain any terminations for default or convenience.
 - p. Discuss the plan for utilization of consultants, if any, and of any subcontracting anticipated.
- 3.0** The USPS Handbook AS-805, *Information Systems Security*, is included within the Publication section of this package. Describe how your security approach complies with the established USPS security requirements, with particular attention to how you will ensure compliance with requirements associated with Title 39, U.S. Code, Section 412.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 2- Documentation

Licensee Security Statement

To ensure that adequate security is included in the implementation of the DSF² Licensed Service, applicant licensees must fully describe the physical and electronic security surrounding the DSF² interface system and mailers' files processed via DSF² within the potential licensee's facility.

Prior to certification and testing, the Security Documentation must be accurately completed and forwarded to the USPS' National Customer Support Center (NCSC) for approval. This information is maintained by the NCSC for each licensee. Prior to **any changes to any portion** of the DSF² security environment, your organization must submit updated Security Documentation containing the proposed changes to the NCSC for approval. The USPS will notify your organization in writing of acceptance status.

If at any time USPS determines that the information provided to USPS is not accurate, your DSF² license can be suspended immediately until accurate documentation is submitted and approved by USPS.

Your signature below affirms that the information provided in this security document is accurate and, once approved by USPS, your understanding that this security configuration may not change without prior notification to and approval by USPS.

Name (Please Print): _____

Company Name: _____

Title: _____

Signature: _____

Date: _____ / _____ / _____

USPS Use Only	
Date Submitted:	___/___/___
Received by:	_____
Check one:	<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 2- Documentation

Security Documentation

When completing the following documentation of security configurations, consider the following:

- If you plan to attach your interface system to a network to which individuals (inside and/or outside your company) has access and those individuals are not authorized to use DSF², electronic security must be implemented. Standard operating system/network security software only is not acceptable.
- The interface system must be physically secured. No access shall be granted to individuals other than those authorized to use DSF².
- All access to and files processed through the interface system must be monitored and secure.
- Describe how your system approach provides adequate electronic security.
- Describe/diagram physical security your organization now has or plans to implement.

LICENSEE PERFORMANCE REQUIREMENTS
DSF² LICENSED SERVICE

Step 2- Documentation

Key Personnel

LICENSING CONTACT: (Primary contacts for licensing issues)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____

SITE CONTACT: (Primary contacts for operational issues)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____

FULFILLMENT CONTACT: (Primary contacts for product fulfillment)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

TECHNICAL CONTACT: (Primary contacts for technical issues)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____

MARKETING CONTACT: (Information to be posted on USPS RIBBS Website YES NO)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____
Company Web site: _____
Customer Service Email: _____
Customer Service Phone: _____

BILLING CONTACT: (Primary contacts for billing issues)

Company Name: _____
Address: _____
City: _____ State: _____ ZIP+4: _____ -
Phone: () - Ext: _____ FAX: () -
Primary Contact: _____
Phone: () - Email: _____
Alternate Contact 1: _____
Phone: () - Email: _____
Alternate Contact 2: _____
Phone: () - Email: _____

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 2- Documentation

EQUIPMENT INFORMATION:

Hardware and software used to create Interface:

Interface Software Vendor : _____

Interface Software Product Name : _____

Interface Software Product Version : _____

Address Matching ZIP + 4 Product Name : _____

Address Matching ZIP + 4 Product Version: _____

Address Matching ZIP + 4 System: **PLEASE CHECK ONE:**

- Open System – Defined as having the ability to modify, adjust, or tweak the application in a manner that will affect the applications ZIP + 4 matching decisions.

- Closed System – Defined as **NOT** having the ability to modify, adjust, or tweak the application in a manner that will affect the applications ZIP + 4 matching selection or decisions.

Interface Hardware Vendor/Model/type : _____

Interface Hardware Operating System : _____

Interface Hardware Serial Number : _____

Note: Please mark any item as N/A if it is not applicable.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 3- Interface

Stage I Interface Development

A Stage I File will be issued along with an Interface Developer Guide (IDG) to prospective Licensees to facilitate their interface development. Sample code is available to assist in writing the interface. The interface must adhere to the requirements set forth in the Licensee Performance Requirements, including all footnotes, security requirements, reports, and statistical information.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

STEP 4- Testing

DEMONSTRATION OF DSF² TESTING

Upon the applicant's request, the USPS will provide the applicant with DSF² Stage II test addresses to be matched. The applicant shall demonstrate the capability of the applicant's DSF² matching software to the satisfaction of the USPS.

The output from the applicant's matching process must (according to the matching criteria set forth in the Performance Requirements):

- (1) Standardize all test addresses that do match the test DSF² or ZIP + 4 file, provide the correct ZIP + 4 code, delivery point values and provide correct footnote(s).
- (2) Provide all address attributes.
- (3) Identify the address(es) that would cause the interface to invoke the "DPV Stop Processing" function.
- (4) Identify the test addresses that do not match the test DSF² and those that do not match the test ZIP + 4 File and provide failure to match Footnote(s).

THE OUTPUT FILES MUST BE RETURNED IN THE SAME FORMAT AS THE FORMAT REQUESTED BY THE APPLICANT FOR THE STAGE II TEST ADDRESS FILES.

The USPS will evaluate the output and notify the applicant of the results. Applicants that meet the match requirements described in the performance requirement statement will be granted licenses.

Applicants shall be evaluated for accuracy of CASS assignments. For each test address correctly encoded by their CASS process, the applicant must correctly answer and provide all DSF² elements with 100% accuracy.

Note: The USPS shall not be obligated to pay any costs incurred in preparing any technical proposal, software development costs, or testing costs, regardless of whether or not the USPS awards a DSF² license to the applicant.

**LICENSEE PERFORMANCE REQUIREMENTS
DSF²® LICENSED SERVICE**

Step 5- License

Execution of License

Upon successful completion of Step 4, an approval letter and a DSF² License Agreement will be sent to the organization. **The DSF² License Agreement must be signed by an officer who possesses legal authority to sign on behalf of the company, firm, or organization.** The signed, original agreement must then be returned to the USPS. Per the License Agreement:

This Agreement constitutes the entire Agreement between USPS and Licensee concerning the subject matter thereof and supersedes all previous agreements and understandings. This Agreement may not be altered, amended, or modified except by a written instrument signed by authorized representatives of USPS and Licensee.

Please note that the applicable payment must be received within 10 working days. Once the signed license is received, it will be forwarded for signature. At that time, a copy of the signed license agreement will be sent to the new DSF² licensee and the USPS will grant electronic access to the monthly product updates via Electronic Product Fulfillment.