

Streamlining Hard Copy Postage Statement Processing

In our ongoing efforts to improve customer service, the Postal Service® will continue to improve efficiencies of Business Mail Acceptance processes. As of March 15, 2010, the Postal Service has streamlined the processing of hard-copy postage statements.

The Postal Service will no longer complete the “USPS® Use Only” section or round stamp hard-copy postage statements submitted to an acceptance unit equipped with the *PostalOne!*® system. This includes the block titled, "Round Stamp (Required) Date Mail Released."

We realize that some mailers may need additional time to adapt to this change or to complete conversion to electronic postage statements. To help ease this transition, the Postal Service will continue to accept duplicate hard-copy postage statements until June 13, 2010, if mailers provide a written request to the Postmaster or, for mailings deposited at a district Business Mail Entry Unit or Detached Mail Unit, the manager of Business Mail Entry

Once an exception is granted, mailers may continue to submit hard copy statements and acceptance personnel will complete the “USPS Use Only” section, including the signature and round stamp blocks. Mailers should ensure that the mail owner and mail agent (where applicable) sections are accurately completed on the hardcopy statements for accurate processing of exceptions. The exception will affect only those postage statements where the permit holder, mail owner and mailing agent (where applicable), are accurately completed.

What has changed?

When a customer submits a hard-copy postage statement to a *PostalOne!* site, acceptance personnel are no longer required to complete the USPS Use Only section of the postage statement, including the signature and round stamp blocks.

Mailers are encouraged to visit the [Business Customer Gateway](#) to access their finalized postage statements. This procedural change will speed and improve service and reduce the amount of paper generated and stored.

The *PostalOne!* system will no longer produce PS Form 3607, Weighing and Dispatch Certificate. After verification and acceptance are complete and the postage statement is finalized, *upon request*, a customer may obtain a Mailing Transaction Receipt, PS Form 3607-R. The 3607-R is produced electronically and will not bear a signature or a round stamp. PS Form 3607-R will not be mailed unless a self-addressed stamped envelope is provided. Figure 1 below is an example of PS Form 3607-R, Mailing Transaction Receipt.

Company Detail	
Company Name	MY BCG CAT COMPANY
Address	PO BOX 23605 WASHINGTON, DC, 20026-3605
Contact Name	RICHARD DAIGLE
Phone Number	(202)268-6392
Profit Indicator	P
PS Form 3607R – Mailing Transaction Receipt	
Permit Holder Permit Number	1209
Permit Holder Permit Type	PI
Mailing Agent Name	
Mailing Agent Permit Number & Type	
Mail Owner Name	MY BCG CAT COMPANY
Mail Owner Permit Number & Type	1209 PI
Customer Reference ID	
CAPS Transaction Number	N/A
Class of Mail	Standard Mail
Processing Category	Letters
Postage Statement ID	56097511
Mailing Group ID	55972499
Total Pieces	500 pcs.
Weight of a single-piece	0.1000 lbs.
Total Weight	50.0000 lbs.
Total Number of Containers	2
Additional Postage	
Total Postage	\$ 206.10
Transaction Date	03/08/2010
Transaction Number	201006713135377M1
Transaction Adjusted?	No
Person authorizing adjustment	
Name	
Phone Number	
Accepted at	OKC PERMIT - 73125-9998
Cost Center	396138-0270
Acceptance Site Mailer ID	
Clerk Initials	RJD
Statement Certification Date	03/08/2010

Figure 1 - PS Form 3607-R, Mailing Transaction Receipt

What will not change?

The verification and finalization processes will not change. Mailers will be notified of any issues, as they are today. Non-*PostalOne!* sites will continue to accept and round-stamp postage statements.

Electronic postage statements

For electronically submitted postage statements, no hard-copy duplicates are returned to the mailer and no hard-copy postage statements are retained at the acceptance unit. Mailers can access the finalized statements online via the Business Customer Gateway.

If an adjustment to the mailer-submitted information is warranted, the system will require the acceptance clerk to record the mailer contact information before a change can be made to the mailer-declared information.

Streamlined hard-copy postage statement processing at *PostalOne!* sites

As of March 15, 2010, the Postal Service will continue to accept hard-copy postage statements, but acceptance personnel will no longer complete the “USPS Use Only” section at sites equipped with the *PostalOne!* system.

Mailers are encouraged to go online to the Business Customer Gateway to submit postage statements electronically. The easiest transition from hard copy to electronic is to use the Postal Wizard. Mailers also may use Mail.dat[®] or Mail.XML[®] to electronically submit postage statements and supporting documentation. All mailers at *PostalOne!* sites can use the Business Customer Gateway to view their mailing activities and retrieve finalized postage statements.

Package mailers are encouraged to participate in eVS[®] (Electronic Verification System) and use the PTS/eVS Electronic Manifest File to submit files that are converted into electronic postage statements and are automatically billed for postage.

Acceptance personnel will enter information from hard-copy postage statements into the *PostalOne!* system to record and complete the mailing transaction. *Upon request*, the Postal Service will provide a Mailing Transaction Receipt, PS Form 3607-R, after completion of acceptance and verification. Key changes follow.

- If not submitting postage statements electronically, the customer must provide an original hard-copy postage statement with the mailing.
- Acceptance personnel will no longer complete the “USPS Use Only” section of hard-copy postage statements at *PostalOne!* sites.
- Acceptance personnel will no longer complete and return a “duplicate” postage statement.
- Acceptance personnel will no longer round stamp hard-copy postage statements.
- Acceptance personnel will retain the original of a hard-copy postage statement and, if adjustments were made to the mailer’s information, attach PS Form 3607-R.
- Upon a customer’s request, acceptance personnel will provide PS Form 3607-R as a receipt for the mailing. Mailing Transaction Receipts must be hand-delivered to the mailer at the acceptance site. Receipts will be mailed only if the mailer provides a self-addressed stamped envelope.
- The *PostalOne!* system provides two proofs of the mailing transaction: The PS Form 3607-R, Mailing Transaction Receipt, is available only from the acceptance unit, and the final Postage Statement is available only through the Business Customer Gateway.

The verbiage on postage statements has been changed from “USPS Use Only” to “USPS Use Only—To Be Completed at Non-*PostalOne!* Sites.” The *PostalOne!* system is the system of record and can be accessed to view, download, and/or print postage statement details.

The Postal Service will modify [Domestic Mail Manual](#) (DMM[®]) language regarding the return of a duplicate postage statement to the mailer, differentiating between *PostalOne!* and non-*PostalOne!* sites.

Domestic Mail Manual changes

- Current [DMM](#) Language

Completing Postage Statements

Any mailing claiming a commercial price and all permit imprint mailings must be accompanied by a postage statement completed and signed by the mailer (in duplicate, if the mailer wants a receipted copy). A change made to any postage statement requires the mailer (agent) to correct the postage statement accordingly and document the correction.

- New [DMM](#) Language (for future DMM update)

Completing Postage Statements

A change made to any postage statement requires the mailer (or agent) to correct the postage statement accordingly and document the correction.

PostalOne! Sites: Any mailing claimed at a commercial price and any permit imprint mailing must be accompanied by an appropriate postage statement, preferably submitted electronically via a USPS approved method (e.g., Postal Wizard, Mail.dat[®], Mail.XML[®] or eVS/PTS).

Hard-copy statements with all applicable fields completed and signed by the mailer may be submitted. Upon request, mailers may obtain a copy of PS Form 3607-R, Mailing Transaction Receipt printed from the *PostalOne!* system. PS Form 3607-R will not be mailed unless a self-addressed stamped envelope is provided.

Non-PostalOne! Sites: Any mailing claimed at a commercial price and any permit imprint mailing must be accompanied by an appropriate postage statement with all applicable fields completed and signed by the mailer (in duplicate if the mailer wants a receipted copy). Duplicate postage statements will not be mailed unless a self-addressed stamped envelope is provided.

Business Customer Gateway: The mailer's resource for accessing postage statements and account management tools

The [Business Customer Gateway](#) on [USPS.COM](#)[®] provides easy access to all Postal Service online business offerings – all with a single user name and password. In addition to providing access to postage statements, the [Business Customer Gateway](#) allows mailers to view company information, manage mailer IDs and electronic data exchange, schedule mailing appointments and track and confirm their mailings. The [User Access to Electronic Mailing Information and Reports Guide](#), Volume 1, Section 4.0 and Appendix B, Access to Online Postage Statements provides information on how to access the [Business Customer Gateway](#) and retrieve postage statements.

Viewing and retrieving postage statements online

Mailers are encouraged to sign up through the [Business Customer Gateway](#) to view, download, and print their finalized Postage Statements and Transactions. This feature is available for mailers who submit electronic postage statements or hard-copy postage

statements. Mail preparers can download postage statements and email them to their mail owners.

We anticipate that as our customers migrate to online and electronic business mailing features, they will find the quick, easy, and convenient aspects of online mailing account management real values to their mailing processes and needs. Some of the many features available are:

- o View and retrieve copies of postage statements
- o Download and email postage statements
- o Manage permits
- o View account balances and track transactions
- o Receive notifications of fees paid/due
- o Submit postage statements for mailings
- o Submit server-to-server postage statements and electronic presort documentation
- o Manage mailing activities

Steps to retrieving finalized postage statements

1. Go to USPS.COM. The link to the **Business Customer Gateway** is in the lower right corner. This link will take you to the Login page.
2. A current user may “Sign In” with an existing Username and Password. New users should click “Sign Up.”
3. On the “New User” “Sign Up” screen, create a Username and Password. Then click “Continue.”
4. On the “Profile Account Type” screen, select “Business.” (“Personal” will send you back to USPS.COM. Then click “Continue.”
5. Create your Business Profile. Red asterisks indicate required information. Then click “Continue.”
6. Verify your Company Account Information on the Company Profile Summary. Then click “Edit” or “Continue.”
7. Agree to the Privacy Act statement. Then click “Continue.”
8. On the Select a Business Service screen, select “Manage Mailing Activity.” Then click “Continue.”
9. New Users will have to go through the Business Service Administrator (BSA) process, unless their company already has a BSA.
10. On the Gateway page, click on the “Mailing Reports” link.
11. Click on the “Dashboard” link.
12. Set the search parameters on the Dashboard Management System screen.
 - a. **Mailing Agents** can view and download (Excel, CSV, or PDF) manually entered (BMEU) statements on their dashboards (if they are identified in the Mailing Agent section during postage statement entry by a PI, MT, PC, PE, or GH permit.)
 - i. “Statement Statuses” must = All
 - ii. “Job Statuses” must = All
 - iii. “Include Closed Jobs” must be checked
 - iv. No other Search Criteria can be populated.
 - b. **Mail Owners** can view and download manually entered (BMEU) statements on their dashboards ONLY if they are also identified in the Permit Holder section of the postage statement.
 - i. “Statement Statuses” must = All
 - ii. “Job Statuses” must = All
 - iii. “Include Closed Jobs” must be checked

- iv. No other Search Criteria can be populated.
13. Click on the Postage Statement hyperlink you want to view.
14. Your selected postage statement can be viewed, downloaded, and printed.

For more information about the [Business Customer Gateway](#), visit ribbs.usps.gov. You'll find "*Business Customer Gateway*" information on the left navigation bar under "Intelligent Mail Services. "

Background of hard-copy postage statement processing

Mailers presenting commercial mailings to the Postal Service must submit a postage statement, appropriate to the class of mail, which includes information about mailpiece characteristics, mailpiece counts, and pricing eligibility based on preparation of the mailing. There are two ways that postage statements may be presented to the Postal Service: an electronic postage statement may be submitted to the acceptance facility prior to the mail being deposited or a hard-copy postage statement may be presented with the mailing at the acceptance facility.

Some mailers wanted a "round-dated" receipt copy of the postage statement after the Postal Service accepted the mailing for processing. They would present the postage statement in duplicate and use the duplicate copy as the receipt.

Customers are required to complete three sections of the hard-copy postage statement. "Mailer" (indicating parties involved in the mailing), "Mailing" (indicating characteristics of the mailing and preparation and compliance methods followed), and "Postage" (indicating postage prices applicable to the mailings based on aggregate information identified in subsections of the form). Postal acceptance personnel were required to complete the "USPS Use Only" section, where they recorded results of the verification and acceptance processes.

At acceptance facilities using the *PostalOne!* system, postage statement information is data-entered into the system to record a transaction against the mailer's postage account. The *PostalOne!* system is the system of record for all mailing transactions processed at these locations.

During the acceptance process, the USPS clerk verifies the mail and validates that the mail is prepared per the prices claimed. If any discrepancies are noted, the mailer has the option to accept the USPS findings or withdraw the mailing for rework.

The Postal Service clerk completed the "USPS Use Only" section of the postage statement, finalizing the information about the mailing. Information in this section supersedes any information recorded by the mailer in previous sections.

Use of a hard-copy duplicate postage statement was the commonly recognized business practice by customers to indicate "proof" of when a mailing was entered into the mailstream. This copy was generally used by a mail service provider to demonstrate to their client that they had fulfilled their contractual obligation.

For questions regarding the [Business Customer Gateway](#) or accessing postage statements, contact the Help Desk at **800-522-9085** or at postalone@email.usps.gov