Full-Service Technology Credit (Tech Credit)

Program Overview

UNITED STATES POSTAL SERVICE®

Agenda

- Background
- Program Eligibility Criteria
- Program Notification Process
- Tech Credit Redemption Process
- Additional Resources
- Question & Answer

Background

- What is a Tech Credit?
  - A one-time credit available to a qualified business location's Customer Registration ID (CRID), which can redeemed as a postage credit
- Why is the Tech Credit being offered?
  - To facilitate the adoption of Full-Service mailing standards

Eligibility Criteria – Permit Types

- Mail volume for each permit will be aggregated for the permit's associated CRID
  - Volume will only be counted from the following Permit types:
    - Permit Imprint
    - Metered
    - Precanceled Stamps
    - OMAS Imprint
    - OMAS Metered
    - Periodicals
    - Ghost

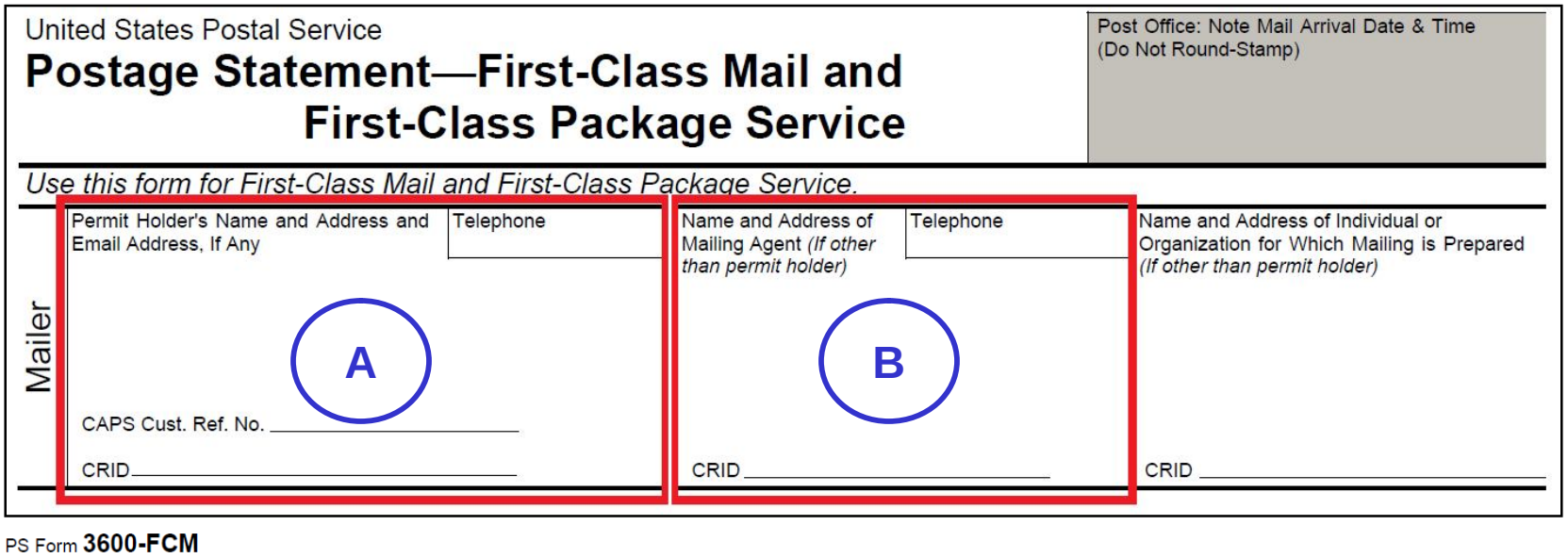
Eligibility Criteria – Mail Classes

- The following Full-Service-eligible mail products will be considered as qualifying mail volume:
  - First-Class Mail Automation Letters, Cards, & Flats
  - Standard Mail Automation Letters & Flats
    - Includes Automation ECR Letters & ECR HD, Basic Flats
    - Does not include Saturation Flats
  - Periodicals Automation/Barcoded Letters & Flats
    - Includes ECR Letters & Flats
  - Bound Printed Matter (BPM) Barcoded Flats

- NOTE: The qualifying mail volume count will include both Full-Service pieces and pieces that could be mailed Full-Service

Eligibility Criteria

- Mail volume of all “Permit Holders” and “Mailing Agents” will be evaluated for Tech Credit eligibility, regardless of current Full-Service mailing status
  - Permit Holder as identified on postage statement (A)
  - Mailing Agent as identified on postage statement (B)


United States Postal Service

Postage Statement—First-Class Mail and First-Class Package Service

Post Office: Note Mail Arrival Date & Time (Do Not Round-Stamp)

Use this form for First-Class Mail and First-Class Package Service.

Mailer

Permit Holder's Name and Address and Email Address, If Any | Telephone

A

CAPS Cust. Ref. No. _____

CRID _____

Name and Address of Mailing Agent *(If other than permit holder)* | Telephone

B

CRID _____

Name and Address of Individual or Organization for Which Mailing is Prepared *(If other than permit holder)*

CRID _____

PS Form **3600-FCM**

Eligibility Criteria – Example

Permit Holder ABC

- Business located in Washington, DC
- CRID: 123456
- Permit profile:
  - PI 1, held in Washington, DC
  - PE 1, held in Baltimore, MD
- Qualifying volume:
  - PI 1 = Paid for 120,000 qualifying pieces
  - PE 1 = Paid for 100,000 qualifying pieces
- Total qualifying volume = 220,000 pieces
- **Mailer ABC will be eligible to redeem a $2000 Tech Credit for CRID 123456**

Eligibility Criteria – Example

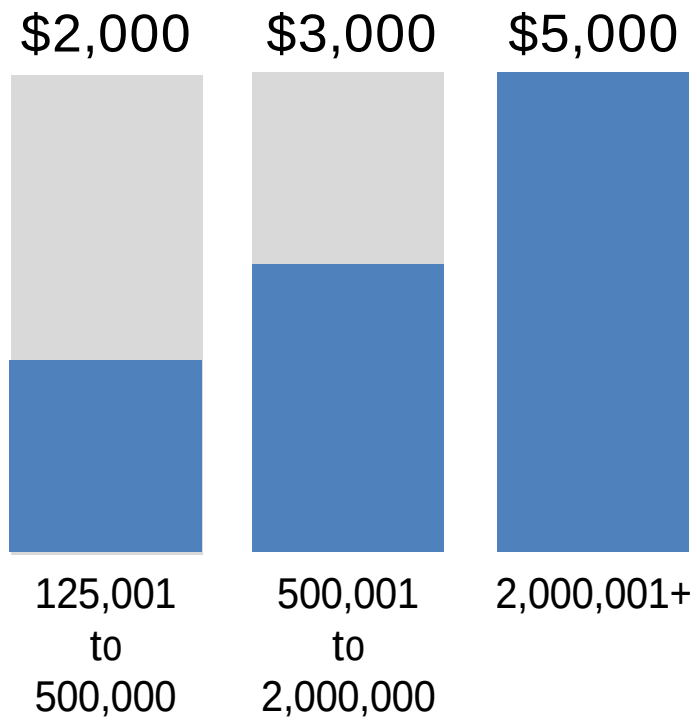
Mailing Agent XYZ

- Business located in Washington, DC
- CRID: 765432
- Permit profile:
  - GH 80001, held in Washington, DC
  - GH 80052, held in Baltimore, MD
  - PI 25, held in Washington, DC
- Qualifying volume:
  - GH 80001 = Identified as “Mailing Agent” for 350,000 qualifying pieces
  - GH 80052 = Identified as “Mailing Agent” for 600,000 qualifying pieces
  - PI 25 = Paid for 500,000 qualifying pieces (“Permit Holder” volume)
- Total qualifying volume = 950,000 pieces
  - “Permit Holder” vs. “Mailing Agent”: Higher volume will determine credit
- **Mailing Agent XYZ will be eligible to redeem a $3000 Tech Credit for CRID 765432**

Eligibility Criteria – Volume Thresholds

- CRIDs that exceed a mailing volume of 125,000 annual qualifying pieces will be eligible to redeem the Tech Credit

HOW MUCH CREDIT?



Annual volume of Full-Service eligible pieces

Eligibility Criteria – Restrictions

- Each CRID that surpasses the volume threshold will be qualified to redeem a Tech Credit
  - Each CRID will be able to redeem one (1) Tech Credit only
  - In the event there are multiple CRIDs identifying the same business location that have linked permits, only the CRID with the highest eligible volume will receive the Tech Credit
- Permits must be opened and CRIDs must be established to be considered for a Tech Credit

Tech Credit Notification Process

- Business locations eligible for a Tech Credit will receive a notification letter with the following:
  - Business Location Name & Address
  - CRID
  - Tech Credit Amount
  - Redemption Instructions
  - USPS Contact Info
  - Tech Credit Overview document
- Tech Credit Program information will be posted on RIBBS and BCG
  - Program Overview/Eligibility Requirements
  - Inquiry Process instructions

Tech Credit Inquiry Process

- An inquiry tool will be established for mailers to request information about their eligibility
  - Tool found on BCG → Tech Credit Information page
  - Also available via links on RIBBS
- Inquiry Process:
  - Mailer submits their business location information and responses to three profile questions via tool
  - Tool prompts to download template/input permit info
  - Mailer e-mails template to the Tech Credit PMO
  - Reviews completed in approximately 10 business days

Tech Credit Redemption Process

- Any permit linked to a qualified CRID may redeem the Tech Credit amount on a postage statement that contains 90% or more Full-Service pieces
  - Permit must be used as the paying permit

United States Postal Service

Postage Statement—First-Class Mail and First-Class Package Service

Post Office: Note Mail Arrival Date & Time (Do Not Round-Stamp)

Use this form for First-Class Mail and First-Class Package Service.

Mailer

Permit Holder's Name and Address and Email Address, If Any	Telephone	Name and Address of Mailing Agent *(If other than permit holder)*	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared *(If other than permit holder)*
CAPS Cust. Ref. No. _____				
CRID _____		CRID _____		CRID _____

Redemption Process – Permit Types

- The permit used to redeem the Tech Credit must be one of the following types:
  - Permit Imprint (PI)
  - Additional Postage (ADDPOS)
  - Precanceled Stamps (PC)
  - Metered (MT)
  - OMAS Imprint (OI)
  - OMAS Metered (OM)
  - Periodicals Account (PE)

- NOTE: Tech Credit will only apply to additional postage when a PC, MT, or OM permit type is used on an eligible statement

Redemption Process – Validation

- *PostalOne!* will perform the following validations prior to applying the Tech Credit:
  1. Submission type is Mail.dat or Mail.XML
  2. “Permit Holder” permit is associated with a CRID that has qualified for the Tech Credit
  3. Permit type is eligible
  4. Postage Statement contains 90% or more Full-Service pieces
  5. A Tech Credit balance of greater than 0 is associated with the qualified CRID

Redemption Process – Application of Credit

- When *PostalOne!* determines that a Tech Credit can be applied to a postage statement, it will do so after all other discounts and incentive have been applied
- Sample Tech Credit statement (PS 3602)

BPM Flats Subtotal(Add lines A1-A54)	$ 7,755.6000
BPM Flats Total (Line A55 minus A56)	$ 7,755.6000
Part A Total(Line A57 or A91)	$ 7,755.6000
Tech Credit	- $ 2,000.0000
Total Postage From All Parts	$ 5,755.60

Redemption Process – Partial Credit

- *PostalOne!* will apply the Tech Credit balance to qualified statements in-full
- A partial Tech Credit amount will be applied to statements if the Tech Credit amount is greater than the total postage for the postage statement
- The remaining Tech Credit amount for each CRID will be applied to subsequent statement(s)

Resources

- The following resources may be retrieved from: https://ribbs.usps.gov/intelligentmail_latestnews/documents/tech_guides/techcredit/techcredit.htm
  - Tech Credit Overview
  - Frequently Asked Questions
  - Full-Service Vendor Information