



## Full-Service Technology Credit (Tech Credit)

### Frequently Asked Questions

#### GENERAL

- **Q:** Will mailers who already submit IMb-Full-Service mailings be considered for the Tech Credit?
  - **A:** Yes, all mailers will be considered for the Tech Credit, regardless of current Full-Service status. Qualification is based on Full-Service eligible volume, which includes any volume that is presently being mailed as Full-Service.
- **Q:** Does a credit apply to those mailers who made investments when IMb and Full-Service were just a concept, (i.e. – early adopters)?
  - **A:** Yes, the Tech Credit will apply to any “Permit Holder” or “Mailing Agent” that meets the eligibility requirements, including those early adopters.
- **Q:** Will a mailer get multiple Tech Credits if they mail for multiple Mail Owners who qualify for the credit?
  - **A:** Each business location/CRID that meets the eligibility requirements will be eligible to redeem one Tech Credit only. A single CRID will not be eligible to redeem more than one credit amount.
- **Q:** The eligibility criteria indicate that USPS will consider Full-Service eligible mail, but the redemption criteria says that the Tech Credit can only be redeemed on Full-Service mail. What is the difference?
  - **A:** All Full-Service-eligible pieces will be considered when calculating a mailer’s Tech Credit eligibility, which includes automation mail that could become Full-Service. The Tech Credit amount, however, can only be redeemed on statements that contain 90% or more Full-Service pieces.
- **Q:** Does the Tech Credit go into each mailer’s local USPS permit account or can we have it put into our CAPS account?
  - **A:** Neither. The Tech Credit will not be reflected on the balance of a local permit or CAPS account for eligible mailers. Credit amounts for eligible mailers will be tracked by business location/CRID and will be referenced when a qualified Full-Service statement is submitted during the redemption period, where a permit linked to the eligible CRID is used as the paying permit. Tech Credit eligibility does not imply that the mailer will “get” a Tech Credit – it simply means that the mailer is *eligible to redeem* the qualified credit amount.
- **Q:** If a Mail Service Provider (MSP) mails under their CRID/permit number for all their clients, can they get two Tech Credits – i.e. one Tech Credit for their CRID and another Tech Credit for being the MSP?
  - **A:** No. When determining a mailer’s qualifying volume, each CRID will be considered as a “Permit Holder” OR as a “Mailing Agent”. These volumes will not be combined and the higher of the two volumes will be used. Each eligible CRID will be able to redeem one (1) Tech Credit only.
- **Q:** We have one CRID, several permits, and multiple Mailing Agents. How will this work if one of the Mailing Agents is not Full-Service but the other two are?
  - **A:** Each CRID will be independently evaluated for Tech Credit eligibility based on its permit profile. All CRIDs will be considered, regardless of their current Full-Service status.



- **Q:** Can the Tech Credit be spread among the permits held for my CRID?
  - **A:** The Tech Credit will not be reflected on the balance of permits. Credit amounts for eligible mailers will be tracked by business location/CRID and will be referenced when a qualified Full-Service statement is submitted during the redemption period, where a permit linked to the eligible CRID is used as the paying permit.
  
- **Q:** Is the CRID assigned in Business Customer Gateway different than the one in *PostalOne!*? Will that matter in applying a Tech Credit to one of these CRIDS?
  - **A:** No, the CRID(s) listed in the Business Customer Gateway (BCG) are the same CRIDs that are listed in *PostalOne!* To note, recognition of qualifying mail volume will be given to the CRID that is associated with the permit that is identified as the "Permit Holder" and "Mailing Agent" fields on a postage statement. These permit-to-CRID relationships can be viewed via the "Manage Permits (*PostalOne!*)" link on the BCG homepage (<https://gateway.usps.com>).
  
- **Q:** How do I know if my organization has a CRID number?
  - **A:** A CRID is a Customer Registration Identification number that is assigned by the Postal Service. This number is not a fixed length and could be up to fifteen characters in length.
  - **A:** If your organization has a Business Customer Gateway (BCG) account established, then a CRID has been assigned to your organization in *PostalOne!* This can be viewed in the "Profile" section of the BCG if a login has been set-up. If your organization does not have a BCG account, one can be set-up at <https://gateway.usps.com>.
  - **A:** If your organization holds a USPS permit account, but does not have a BCG account established, a CRID may or may not already be assigned to your business location, depending on when the permit was opened. To determine if a CRID has been assigned to your business location(s), please contact the *PostalOne!* Help Desk at 1-800-522-9085 or at [postalone@usps.gov](mailto:postalone@usps.gov).
  
- **Q:** How firm is the January 2014 Full-Service deadline that the Postal Service is considering?
  - **A:** The Postal Service is moving ahead with the January 2014 deadline that requires mail pieces to be Full-Service in order to get the automation discount. A Federal Register notice has been submitted that includes the January 2014 date.
  
- **Q:** Is the program for 1-year only from June 2013 to June 2014?
  - **A:** The Tech Credit is a one-time program. The credit redemption period is currently set to run for a one-year period between June 2013 and June 2014. All credit amounts are planned to expire on June 1, 2014.
  
- **Q:** Why is this called a Tech Credit? It sounds more like a volume credit.
  - **A:** The credit being offered through this program is meant to help offset the cost to implement the necessary technology to support Full-Service mailings. Eligibility is driven by volume.
  
- **Q:** How do you get help becoming Full-Service certified?
  - **A:** Full-service Information is available on the RIBBS website at <https://ribbs.usps.gov/index.cfm?page=intellmaillatestnews>.
  
- **Q:** Will this credit only apply to *PostalOne!* customers?
  - **A:** No, the Tech Credit is not restricted to only *PostalOne!* users. Any mailer with a qualifying volume, based on all USPS permit data, will be eligible to redeem a Tech Credit.



- **Q:** I have heard that some mailers have had problems with their Permits being accurately assigned to their CRID, how do I validate my information?
  - **A:** A CRID's permit profile can be determined by logging into the Business Customer Gateway (BCG) with a login associated with the CRID and clicking the "Manage Permits (PostalOne!)" link. Customers who do not have a BCG account can contact the *PostalOne!* Help Desk at 1-800-522-9085 or at [postalone@usps.gov](mailto:postalone@usps.gov).
- **Q:** Will Full-Service still be available, but just without the Tech Credit, after the June 2014 date?
  - **A:** Yes, Full-Service will be available after the Tech Credit amounts expire in June 2014. No further Tech Credit opportunities are scheduled at this time.
- **Q:** If the program is only now being announced shouldn't the period of mail volumes be considered moving forward instead of the previous year?
  - **A:** Yes, Full-Service will be available after the Tech Credit amounts expire on June 1, 2014. No further Tech Credit opportunities are scheduled at this time.
- **Q:** Will all post offices accept electronic submission of postal statements?
  - **A:** To claim the Tech Credit on a qualified postage statement, a Mail.dat or Mail.XML electronic statement must be submitted to a post office that supports *PostalOne!* If your desired post office does not currently support the *PostalOne!* system, please contact and notify the *PostalOne!* Help Desk at 1-800-522-9085 or at [postalone@usps.gov](mailto:postalone@usps.gov).
- **Q:** Can you receive a Tech Credit only once in the year?
  - **A:** The Tech Credit is currently proposed to be a one-time offer.

#### FULL-SERVICE TECH CREDIT ELIGIBILITY

- **Q:** As an MSP, how is Tech Credit eligibility determined if we're not mailing out of our own permit, but the CRID is obviously ours?
  - **A:** USPS will determine eligibility for a Mail Service Provider (MSP) through qualifying annual volume on their permits (as the "Permit Holder"), as well as on postage statements in which they were identified in the "Mailing Agent" field. USPS will use the volume that is higher when determining the Tech Credit amount an MSP is eligible to redeem. Some MSPs may only have a Ghost permit number being used for identification as a "Mailing Agent" and do not hold a permit to pay for mailings. Since the Tech Credit must be applied to a paying permit, if the MSP does not have a paying permit, they will be handled through an exception process.
- **Q:** Are Mail Owners eligible for the Tech Credit?
  - **A:** Mail Owners that are identified as "Permit Holders" will qualify for the Tech Credit if they meet the eligibility requirements for volume.
- **Q:** If we meter our mail and then give it to a commingler/presort bureau, will that volume be counted for us or the commingler?
  - **A:** Recognition of qualifying volume will go to the party that is listed as the "Mailing Agent" on the postage statement (or eDoc) that is submitted to the Postal Service. Typically, this is the mailing party who submits the eDoc to the Postal Service.



- **Q:** When a mailer qualifies with Metered mail, does the Tech Credit go only to the Metered permit account?
  - **A:** No. The Tech Credit will not be reflected on the balance of a local permit or CAPS account for eligible mailers. Credit amounts for eligible mailers will be tracked by business location/CRID and will be referenced when a qualified Full-Service statement is submitted during the redemption period, where a permit linked to the eligible CRID is used as the paying permit. When pre-paid postage is used on an eligible statement, the Tech Credit would only be applied to the additional postage, if any is due.
  
- **Q:** Say my company has a CRID in Baltimore and a CRID in Philadelphia. Could we qualify for 2 Tech Credits?
  - **A:** Yes, the CRIDs will be evaluated independently using their respective permit profiles. Both CRIDs would be eligible to redeem one Tech Credit, assuming each meets the minimum qualifying volume threshold.
  
- **Q:** In Example 1 from Tech Credit overview slide deck, does both the “Permit Holder” and the “Mailing Agent” receive a Tech Credit of \$2000?
  - **A:** In the example, if the same CRID is identified as the “Permit Holder” and “Mailing Agent”, that CRID would be eligible to redeem only one Tech Credit amount. Each CRID will be viewed as a “Permit Holder” or “Mailing Agent” – not both. However, if a different CRID we identified as the “Mailing Agent” in the example, then each CRID would be eligible to redeem a credit.
  
- **Q:** In Example 1 from Tech Credit overview slide deck, if the “Permit Holder” has two agents, one doing the DC mail and one doing the Baltimore mail, the “Permit Holder” gets a credit but the two agents do not, correct?
  - **A:** Correct, the two mailing agents would not qualify for a Tech Credit, assuming they had no other qualifying volume.
  
- **Q:** In Example 1 from Tech Credit overview slide deck, all of the “Permit Holder’s” mail is being presented by a different “Mailing Agent” – is credit for the qualifying volume given to both parties? If so, why?
  - **A:** Recognition for qualifying volume from all statements in the evaluation period will be given to both the “Permit Holder” and the “Mailing Agent” CRIDs, regardless if they are the same. However, a single CRID can only count qualifying volume as a “Permit Holder” or as a “Mailing Agent”. The Postal Service will automatically choose the qualifying volume that is higher for each CRID when determining Tech Credit eligibility – this is to avoid double-counting where the same CRID is identified as the “Permit Holder” and “Mailing Agent”. “Permit Holder” volume is being considered because some Mail Service Providers are only identified as “Permit Holders” on qualifying statements.
  
- **Q:** In Example 2 from the Tech Credit overview slide deck, why doesn't the agent get the total of all the mail, the GH and the Permit? Why did you separate the Permit mail out?
  - **A:** When determining a mailer’s qualifying volume, the Postal Service will consider each CRID as a “Permit Holder” OR as a “Mailing Agent”. These volumes will not be combined – we will take the higher of the two volumes. In the example, the Ghost permits were used to identify the CRID as a “Mailing Agent”, while the Permit Imprint was used to identify the CRID as a “Permit Holder”. Had the Permit Imprint also been used to identify the CRID as a “Mailing Agent”, the three volumes would have been totaled.
  
- **Q:** What is the timeline for calculating mail volume for Tech Credit eligibility?



- **A:** Mail volume from October 1, 2011 – September 30, 2012 (USPS Fiscal Year 2012) will be used to determine Tech Credit eligibility.
- **Q:** When assigning qualifying volume, what if the client's CRID, who is using the Mailing Agent's permit, is assigned to a different city other than the mail provider's actual mailing city?
  - **A:** If the "client's CRID" is linked to the "Permit Holder", or paying, permit, recognition for the qualifying volume will go to the clients' CRID. If the Mailing Agent's permit is also being used as the "Permit Holder" permit, then the client's CRID will get no recognition for the qualifying volume – the Mailing Agent CRID would be assigned that volume.
- **Q:** Are Commercial-Plus Pricing (CPP) customers eligible to qualify for a Tech Credit?
  - **A:** Yes, CPP mailers will qualify for a Tech Credit if they exceed the volume threshold of qualifying mail. All permits and CRIDs will be considered for Tech Credit eligibility.
- **Q:** Could any site ever be awarded a Tech Credit amount greater than \$5,000?
  - **A:** No, a single mailing location could never get more than a \$5,000 Tech Credit.
- **Q:** Some mailers will have qualified for the maximum Tech Credit award within the first couple of months, do those mailers have to wait a full year to use the credit?
  - **A:** Historical volume from October 1, 2011 – September 30, 2012 (USPS Fiscal Year 2012) will be used to determine Tech Credit awards. Mailers will be able to begin redeeming their Tech Credit awards as soon as the redemption period begins (June 1, 2013).
- **Q:** If we meter our mail and then give it to a commingler/presort bureau, will that volume be counted for us or the commingler?
  - **A:** Recognition for qualifying volume for Tech Credit consideration will be given to the CRID identified as the "Permit Holder" and as the "Mailing Agent" for all postage statements submitted during the evaluation period. In this case, the party who metered the mail will get the volume recognition if their permit was used as the paying permit on the postage statement that was submitted to USPS. The party who prepared the mail, as identified by the "Mailing Agent" field, will also get the volume recognition. A single CRID, however, will only be considered as a "Permit Holder" or as a "Mailing Agent" – the Postal Service will choose the higher of the two qualifying volumes.
- **Q:** If the Mail Owner mails through a Mail Service Provider but uses the Mail Owner's permit number, can the MSP also count the volume toward their maximum total?
  - **A:** Recognition for qualifying volume for Tech Credit consideration will be given to the CRID identified as the "Permit Holder" and as the "Mailing Agent" for all postage statements submitted during the evaluation period. The party who prepared the mail, as identified by the "Mailing Agent" field, will also get the volume recognition. A single CRID, however, will only be considered as a "Permit Holder" or as a "Mailing Agent" – the Postal Service will choose the higher of the two qualifying volumes.
- **Q:** If the MSP mails under their CRID/permit number for all their clients, can they get: a) one Tech Credit for each Mail Owner; and b) one Tech Credit for being the MSP?
  - **A:** Qualifying volume for Tech Credit consideration will be given to the CRID identified as the "Permit Holder" and as the "Mailing Agent" for all postage statements submitted during the evaluation period. However, when determining each business location's qualifying volume, each CRID will be considered as a "Permit Holder" OR as a "Mailing Agent". These volumes will not be combined and the higher of the two volumes will be used. Each eligible CRID will be able to redeem one (1) Tech Credit only.

#### FULL-SERVICE TECH CREDIT NOTIFICATION PROCESS

- **Q:** How do I find out if I'm eligible to redeem a Tech Credit?
  - **A:** Tech Credit amounts will be displayed on each CRID's Manage Permits page, accessible through the Business Customer Gateway once the Tech Credit Eligibility List has been finalized (targeted in Quarter 2, 2013). Tech Credit inquiries will also be accepted via the Tech Credit Program Summary page, which will be accessible via the BCG homepage in April 2013.
- **Q:** Will there be any kind of notification on Tech Credit redemption?
  - **A:** This information will be shown on a new Tech Credit transaction report, accessible via the Business Customer Gateway. This report will be available beginning in April 2013.

#### FULL-SERVICE TECH CREDIT REDEMPTION

- **Q:** Can the Tech Credit be used to pay additional postage on a metered mailing?
  - **A:** Yes, when a qualified statement is submitted during the Tech Credit redemption period and a qualified Metered or Precancelled permit is used as the paying permit, the Tech Credit amount would be used toward the additional postage amount only, if applicable.
- **Q:** Why can't you get the credit if you use Postal Wizard??
  - **A:** Eligible mail volume from Postal Wizards statements will be used when calculating a mailer's qualifying Tech Credit volume. Postal Wizard statements, however, will not be eligible to redeem a Tech Credit.
- **Q:** Why are Postal Wizard statements unable to redeem the Tech Credit?
  - **A:** Postal Wizard is designed for use by customers who mail less than 10,000 pieces, and are not the target group of the Tech Credit. Full-service mailings should be submitted via Mail.dat or Mail.XML – Postal Wizard should only be leveraged during certain exceptions, such as system outages.
- **Q:** Will USPS be designing a Tech Credit link so permit customers can enter the particular business location/CRID to receive the credit? Is that already exercised upon applying for this Tech Credit Promotion?
  - **A:** Tech Credit eligibility will be determined based on the amount of qualifying volume per business location/CRID. Eligible CRIDs will be able to redeem the credit amount by submitting a qualified Full-Service statement during the program's active period. *PostalOne!* will apply the Tech Credit as a postage credit when any "Permit Holder" permit linked to the eligible CRID is used on a qualified statement. No opt-in or registration is required to be considered for Tech Credit eligibility.
- **Q:** Does the Tech Credit go into the local USPS permit account or can we have it put into our CAPS account?
  - **A:** Neither. The Tech Credit will not be reflected on the balance of a local permit or CAPS account for eligible mailers. Credit amounts for eligible mailers will be tracked by business location/CRID and will be referenced when a qualified Full-Service statement is submitted during the redemption period, where a permit linked to the eligible CRID is used as the



paying permit. Tech Credit eligibility does not imply that the mailer will “get” a Tech Credit – it simply means that the mailer is *eligible to redeem* the qualified credit amount. The permit can be a Permit Imprint, Additional Postage, Metered, Precancelled Stamp, OMAS Imprint, OMAS Metered, or Periodical account.

- **Q:** Does a permit(s) used for Tech Credit redemption have to be the same as the one(s) that accrued qualifying volume?
  - **A:** No, any permits linked to a qualified will be able to redeem the Tech Credit. For example, Permit 1 has a qualifying volume of 125,001 pieces, while Permit 2 and Permit 3 have no qualifying volume. CRID A is linked to Permit 1, Permit 2, and Permit 3. Permit 1, Permit 2, and Permit 3 can all be used to redeem the Tech Credit.
  
- **Q:** What kind of visibility will we have when we use our Tech Credit?
  - **A:** Mailers will see the Tech Credit as a line item on the postage statement where it has been applied. The Tech Credit will be applied after all other discounts have been applied. A Tech Credit Report will also be made available on the Mailing Reports page, accessible via the Business Customer Gateway.
  
- **Q:** Will mailers have the ability to decide which statement the Tech Credit is applied to, or which permit can be used to redeem the credit?
  - **A:** The first qualified statement that is submitted containing a permit, in the “Permit Holder” field that is linked to a qualified CRID will be used to redeem the credit. The credit will always be applied in full, unless the Tech Credit award amount is larger than the value of the qualified postage statement. In this case, the remaining Tech Credit can still be applied to a subsequent statement(s) until the award balance has been drawn down. There will also be an exception process that allows mailers to select which permit(s) associated to a Tech Credit awarded CRID would be eligible to redeem the credit..
  
- **Q:** Can a Tech Credit balance expire?
  - **A:** All Tech Credits will expire one year after the date of activation. This tentative date is June 1, 2014. Any unused credit amount would become void on this date. May 31, 2014 is the last date to redeem a Tech Credit.
  
- **Q:** Why will Tech Credit balances expire?
  - **A:** All Tech Credits will expire one year after the date of activation. The amounts will be available for a limited time in order to encourage the adoption of Full-Service mailing standards.