

# PostalOne! System Issues Affecting Revenue Standard Operating Procedure (SOP)

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## Scope

This document describes the process to be followed in the event an issue identified in the *PostalOne!* System impacts postage calculations and results in either collection of additional postage or refund of postage. Included in this document are USPS internal business processes in identifying, investigating, and resolution (as applicable), as well as the internal and external communication process.

## Overview

*PostalOne!* System issues are identified by internal and external users and reported to the respective *PostalOne!* Help Desks. The Helpdesk logs the issue and based upon the information contained in the report or the volume of reports on the same issue, Tier 2 IT support is contacted to investigate. An ALM number is assigned to the defect for tracking purposes.

## Process

- Identification and Investigation (Internal)
  - **Identify the Defect.** Issues with *PostalOne!* are reported to either the internal or external *PostalOne!* Helpdesk accordingly by the individuals who use the system.
  - **IT investigates the issue to validate and/or repair defects.** The status of the defect is then reported to both the HQ MEI and ME groups. If it is determined the issue impacts revenue core MEPT individuals are notified. (Appendix A)
  
- Resolution
  - **MEPT develops a workaround and reports to MEI-** If it is determined that an issue exists that impacts revenue the MEPT core team is notified. The MEPT group will determine corrective action that may include a system change to correct the issue and/or a business work around. The business workaround may include steps to collect additional postage or refund postage as appropriate from the date the start date the issue is related to (release, patch, etc.) to the date the issue is corrected.
  - **Ad Hoc query run by IT to identify impacted customers**
    - This query will include the following:
      - Area and District
      - Cost Center, Finance Number, Permit, Job ID, Mailing Date
      - Mailing Agent, Mailing Agent CRID, Mail Owner, Mail Owner CRID
      - Total Pieces
      - Total Postage Paid, Total Postage Actually owed, Difference (over/under collected)
  - Note: additional information may be included as it relates to the issue
    - Dependent on the scope of the impact a "Data Repair" may be performed to resolve the postage issue.
  
- Communication
  - **Internal**
    - Email to Area Marketing Managers which will include:
      - Description of issue
      - Expected resolution date
      - List of mailers impacted by Area/District
      - Revenue Issue letter to notify mailers
      - Detailed instructions to correct revenue
      - Completion date and reporting instructions

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- Additional information may be distributed via the BMA Newsletter, BMA Advisory and webinars
- **External**
  - Issue will be raised as soon as USPS becomes aware of it on the User Group 1 call
    - Dependent upon the issue other communications may include
      - DMM Advisory
      - Industry Alert
  - Upon request, Mail Service Providers (MSPs) will be provided
    - A copy of the signed Revenue Issue Letter
    - AD Hoc Query for mailings entered under their Mailing Agent CRID

### **MEPT Core Team**

Mgr. MEI – Uni Han-Norton

Mgr. ME – Garrett Hoyt

Mgr. Payment & Technology Systems – Vicki Bosch

Mgr. Streamlined Mail Entry – Diane Smith

Business Programs Specialists – Verdonna Hudson  
Christine Simone

Program Mgr. Information Technology – Ruth Stock