Meeting Title	Weekly MicroStrategy Reporting Subgroup Meeting		
Date	11/07/2014	Time	9:45am – 11:00am
Location	Webex		

Attendee	Attendee	Attendee	Attendee
David Rhiel	Warren Bordeau	Denise Revell	Jennifer Howard
Arlene Zisow	Margo Petrachek	Parth Shah	Bob Schimek
Steve Krejcik	Angelo	Peter Furka	Ty Inman
Randy Randall	Jim	Holly Kozlencer	Paula Stoskopf
Tom Glassman	John Whittington	Nancy Garrison	Brad – Interlink
Wanda Senne	Bob Rosser	Ed Wanta	Neil Dean
Jarita Norman	Darrell Anthony	Danielle Aleman Rojas	Paul Felber
Michael Patterson	Monica Lundquist	Beth Bigelow	Daniel Wolf
Joe Cullen	Matt Chaplin	Sherry Burbach	Jurt Ruppel
Lisa Gnibus	Adam Collinson	Sharon Harrison	Tad Wolfe
Randy Workman	Charles Brown	Melissa Tang	Susan Pinter

Purpose of Meeting	To discuss the Reporting content and to fix and regain confidence in the Microstrategy reports.

Meeting Minutes

- Postage Assessment (Invoicing) Overview and Timeline
  - The charging for invoices start dates are:
    - If there are outstanding issues from the September Release still impacting a mailers scorecard, wait until after the next release to view the invoices
    - If there are **not** outstanding issues still impacting a mailer, look at the invoices now
    - Electronic Verification – April 2015
  - Invoice Generation
    - Invoices are generated 10 calendars after the end of the month
      - ~0200 hours on the 11 of each month
  - Question: will the data from 1 November – 9 November be recast after that? Will the December invoice have 9 days of potential errors?
    - Depends on specific error metric
    - Most of them are only going forward
    - Will not have a completely clean invoice until 11 January 2015

- Invoice Receipt
    - Invoice receipt is sent to the anyone with the VAE role in BCG
- Verification Assessment Evaluator (VAE) is
  - Responsible for:
    - Viewing/paying the invoice
    - Disputing the invoice CRID based
  - Multiple CRIDs = Multiple VAEs
  - Can have one or many VAEs per CRID
  - **Question:** Can mailers view the invoice on the 10th of the month or the 11th of the month?
    - The additional postage line is updated throughout the month and reflects how much potential postage is due until the 10 days after the close of the month
    - the actual and actionable additional postage due is generated prior to the start of the 11th day of the month
  - **Question:** will the total postage due fluctuate after the month ends given the 48 hour latency on data or will I see that postage due line continue to change based on additional errors logged after calendar month ends up until the 10th of the month?
    - Formal answer: It's locked at 12:01 A.M. the morning of the 11th day of the month
    - Practical answer: it depends on which of the assessments we're talking about
      - If you're looking at the electronic verification based on eDocumentation it could be as soon as 48 hours after the last postage statement of the month is finalized
      - The exception is in seamless where mail is running through the system and verification is happening to that mail as it goes through the system is where you can continue to see fluctuations until the 11th
  - **Action Item:** Beth Bigelow to change documentation to show that invoices are ready on the 11th day of each month, not the 10th
- Mailer Sets Up VAE Account: Workflow Detail
  - No comments or questions
- Mailer VAE: Receives Automated Invoice Notification Email
  - If there is postage due, the VAE (if one set-up, otherwise goes to the BFA) gets the email displayed with their:
    - CRID
    - Postage Due Amount
  - It is an automatic notification that there was a postage assessment generated
    - It is the start of the pay/dispute process
  - Call for comments:
    - Add more information providing more information on the email itself describing what the email is and what it is for
      - Link to a guide

            - Help line number
        - Question: Will all of the VAEs for a CRID get the same email and see who the email is going to or will it be an individual notification without visibility into who receives the email?
            - Beth believes that it is an individual email
            - **Action Item:** Beth to confirm if the notification email is an individual notification to recipients on the same CRID
        - Question: I am the VAE for several different CRIDs, am I going to get a separate email for each CRID or will I get one combined email for all my CRIDs?
            - Beth is 99% certain that it is an email per CRID
            - **Action Item:** Beth to confirm that it is an notification per CRID
            - It is cumbersome to receive multiple Invoices for multiple CRIDs with an invoice
            - Holly would rather see one email with all of the CRIDs instead of multiple emails for each CRID
                - Even a corporate roll-up would be appreciated
            - Is there a way for a user to choose between a consolidated email or multiple emails
            - Question: what notifications options do you see a user to choose from
                - Notification of no bill
                - Consolidated bill or not
                - If consolidated, what CRIDs would be consolidated to it
            - Question: is this a nice to have or a must have for the invoice process to work?
                - "A nice to have"
        - Sharon would prefer to see all of the VAEs per CRID on the TO: Line
            - Paula agrees
        - **Clarification:** For any CRID, whoever signed up for notification of an invoice they all get the notification in the TO: Line that says, "You're all getting an email, here is your assessment."
            - Want to be able to see everyone who received the email
        - At least two mailer wants to receive a monthly invoice notification even if there isn't a penalty assessed against them
            - Currently the USPS is not generating zero dollar invoices today
            - **Action Item:** Beth Bigelow to confirm if generating a zero dollar invoice is an enhancement request
        - The invoice should include it comes from the USPS
- Mailer VAE: Business Customer Gateway (BCG) → Other Services → Mail Entry Invoice Reports (summary report)
    - The landing page allows mailers to pick the date range that they want to run the report against

        - Default is to the last invoice prepared
        - Can collect one or multiple CRIDs
        - Can filter against invoice Status
    - Show CRID details opens a new window
        - To be consistent with the rest of the systems, it would be nice to include the CRID number an name right in the eDoc CRID window, sorted by CRID name
        - This is for consistency from a User Standpoint
        - Mailers tend not to memorize their individual CRID numbers
        - Clarification: mailer wants to always see the CRID number and CRID name sorted by CRID name
- Mailer VAE: Business Customer Gateway (BCG) → Other Services → Mail Entry Invoice Reports (summary report, continued)
    - This is the screen where a mailer can take action
        - Drill into details
        - Pay or
        - Dispute
    - Steve would like to see the D-code in the report execution where it says “responsible CRID”
    - One change the USPS is making in the next release is in how the total postal impact is calculated
        - There are 4 different programs that roll-up into the Postage Assessment Report
            - Full Service Electronic Verification
            - eInduction
            - Seamless Acceptance
            - MOVE/UPDATE
        - These won’t all necessarily going to be activated for the generation of a payable invoice at the same time period
        - Total Postage Impact Field will only reflect the total payable postage due
        - For the November release, the total postage impact field should be zero because none of the invoices are payable until the 11 April invoice
    - Question: How can I see the total postage payment due at an enterprise level?
        - Not currently available
        - This was decided because of the multiple views each VAE has based on the filter used
    - Question: is that a feature you would like
        - Mailers with multiple locations might like a quick snapshot of the total amount due by the enterprise instead of adding up by CRID
        - This could be “total” field at the bottom of the report
        - Multiple mailers like this idea
    - Question: The minimum invoice is $50, is that done on an individual CRID basis?
        - Yes, that is done an individual CRID basis

        - **Action Item:** Beth Bigelow will confirm with the development team how the limit is being applied to the report generation and displayed
        - Question: If all the postage due is less than $50 for all four programs combined then the mailer does not have to pay for a CRID?
            - That is correct
- Mailer VAE: Business Customer Gateway (BCG) → Other Services → Mail Entry Invoice Reports (detailed report)
    - Designed to be a finer level report than the summary report
    - More detail on the current status of a mailers invoice
        - When it's due
        - If it's in dispute
        - Response from the USPS
        - Description of the current status
        - Breakdown within each program of where error is fallen
    - Additional details added to the report
        - Errors – two potential postage amounts
            - Original postage amount – the amount billed in the original invoice for that error type
            - Final postage – the amount of postage due after a dispute is reconciled
        - Error count
            - Number of pieces that exceeded the threshold that caused the postage calculated
            - What was the percentage over the threshold
        - **Action item:** Beth Bigelow to provide an updated screenshot of the next columns listed for this slide for inclusion with the meeting minutes
    - Also breaking out the impact from Full Service Electronic Verification line on this report into the six different pieces
        - MID
        - SID
        - Duplicate Barcode
        - Etc.
    - The USPS has difficulty displaying and explaining that the dollar values listed might not add up to what's shown on the summary report if the same mail piece had multiple errors on it
        - The USPS might include a state that explains that in a footnote
    - Question: if I have a mail piece with multiple errors, which category would I be charged for?
        - A piece could be invoiced for multiple errors depending on the error types
        - Caps per piece are in place so that an individual piece cannot exceed the appropriate single piece rate for that mail type
    - Question: what if one error type is under the threshold and the other is over?

        - That piece would be charged once for the item that is over the threshold
        - The USPS cannot take away the Full Service discount once
    - Question: Since mailers question the quality of the data, early on we're going to want full listing of every single piece addressed for each category so we can query against it and compare, how do we get that data?
        - In the short term – make a request with your assigned BMS analyst for that full data extract
        - Long term – the USPS is working on an automated process for it
    - Question: Beth, do you have the recommendation that the sub-group made on the data export about two years ago?
        - Probably, but I would like it again and would like to discuss it again in case the recommendation has changed in the two years since it was first made
        - **Action Item:** Steve Krejcik will send the data export recommendation to Beth Bigelow today and will discuss in a future meeting
    - Question: It says Postage Due near the bottom, is that the same number as the total postage impact listed the summary page?
        - It should be unless there was a dispute that changed the total amount of postage due currently owed
        - Recommendation: change "Postage Due" to "Total Postage Impact" to keep the terminology the same
- Question: it appears that the USPS is going to allow a mailer to debit another permit. Is that limited to only permits that I own?
    - As the eDoc submitter when you go pay a postage assessment you will have access to permits that you own and permits that you mailed for the month that the postage assessment was generated for
    - The current capability allows a MSP to use their customer's permits to possibly pay another customers, or their own, mail postage due
    - That is not good business practice in several mailers opinion
    - There should be a mechanism so that there is a notification that goes out to determine who made the error and that determines who gets charged
        - That way the customer sees the notification prior to completing the transaction
    - This conversation is tabled for UG1 and 163 since it's about financial transactions and not sub-group reporting
    - Recommendations:
        - Turn off the functionality until UG1 or UG163 can figure out how to address this
        - Take this to MTAC

Questions Still Outstanding

#	Question
1	None

Action Items			
#	Accountable Person	Action Item	Date
1	Beth Bigelow	Beth Bigelow to change documentation to show that invoices are ready on the 11th day of each month, not the 10th	14 Nov 2014
2	Beth Bigelow	Beth to confirm if the notification email is an individual notification to recipients on the same CRID	14 Nov 2014
3	Beth Bigelow	Beth to confirm that it is an notification per CRID	14 Nov 2014
4	Beth Bigelow	Beth Bigelow to confirm if generating a zero dollar invoice is an enhancement request	14 Nov 2014
5	Beth Bigelow	Beth Bigelow will confirm with the development team how the limit is being applied to the report generation and displayed	14 Nov 2014
6	Beth Bigelow	Beth Bigelow to provide an updated screenshot of the next columns listed for this slide for inclusion with the meeting minutes	14 Nov 2014
7	Steve Krejcik	Send the data export recommendation to Beth Bigelow today and will discuss in a future meeting	5 Nov 2014