MTAC 143 – Postage Statement Auto-Finalization Subgroup From 3/22/2012

- SA business model – USPS wants the submission and criteria we establish to auto-finalize mailers' postage statements
- The subgroup has a completion date of 5/1/2012
- Subgroup purpose – The purpose of this task team is to identify the processes, IT capabilities, and exceptions needed to enable an auto-finalize postage statement process to support the SA business model.
- Proposed solution: Activate mailers for SA process by site, mark containers ready to pay -> based on mailing date submission -> trigger P1 to auto-finalize postage statements.
  - Probably to simplistic – need to discuss other conditions involved in more complex mailing environments to make the auto-finalization process work across all mailing environments.
- Need to identify the mailing types
- Need to change subgroups mission state to include mailings where postage statements are received after mailings are entered into the mailstream – USPS plans to use an auto-finalize process for those mailings.
- Should the auto-finalize solution include extra fields like:
  - Mailing date
  - Postage statement mailing date
    - The purpose of using the postage statement mailng date is for mailers who mark their containers RTP -> submit eDoc in advance to P1 -> then P1 auto-finalize postage statements based on the "postage statement mailing date."
    - Submitting postage in advance helps automated flows and/or fits into normal workflow -> if mailing is produced, verifications done, got pc weight -> everything there -> submit postage to P1. Could reduce bottlenecks and proactive contingency plans -> in case P1 goes down.
- Mailing environments where postage is paid after the fact – we should include Periodical CPP mailings -> sit in a non-finalize status up to 28 days.
- Are there scenarios where we would want to use appointments to trigger postage auto finalization?
- Do we need to list each mailing environment – then work through each environment one at a time?
- List mailing environment
  - Mail.dat document includes these fields -> which fields should be used and should not be included:
    - Container ship date
    - Scheduled container date
    - Mailing date
    - Container pickup date
    - Scheduled induction date
    - Actual induction date
    - Acceptance date (remove)
    - Internal date
    - Postage statement mailing date

    - Quad Graphics has performed some analysis on using these dates in the past for similar internal business processes – only field that made sense to use was the postage statement mailing date.
        - Postage Statement Date – the date on which postage is paid to the USPS and verification is completed.
    - Some of those fields are unknown prior to shipping – therefore mailers populate those fields with default dates until they are know. Therefore we shouldn't use these fields.
- The postage statement date is at the container level – mailer assigns a mailing date to the group of containers – which becomes the postage statements.
- Need the flexibility to allow mailers to send transportation update to P1 after postage has been finalized.
- FCM list mailer using TMS create pallet separation based on TMS separations. These mailers don't know the separations until they run trays through the TMS system.
    - For example, 10 FCM trays go to Pitts to from Kansas -> can create 10 separations/trips based on air routes.
    - Can FCM list mailers in a staged environment enter mail into the USPS mailstream before eDoc will be submitted to P1??? Or does this situation only apply to continuous mailers???
- For list mailers without TMS will triggering auto-finalization using mailing date, ready-to-pay, and postage statement mailing date handle all scenarios?
- Need to look at staged and continuous environments using TMS as scenarios by themselves.
    - Need to see if mailing date, ready-to-pay, and postage statement mailing date will work in these environments too.
    - For Staged listed environments – mailers should have container nesting data available when mailings are ready to be dispatched.
- Need to create a list of mailing environments and data elements that will trigger postage auto-finalization.
    - Commingle/MLOCR
    - Combined
    - Comail
    - Copal (need to identify by mail class, SA/non-SA mailings, and internal/external)
    - Periodical CPP
- For commingled/MLOCR environments the data elements mailing date, ready-to-pay, and postage statement mailing date should work to trigger postage auto-finalization.
- The minor difference between the list and continuous environments:
    - List environment - RTP might come before the postage statement mailing date
    - Continuous environment - RTP might come after the postage statement mailing date
- Add a definition column to our postage statement auto-finalization matrix.
- Copal Std Tray mailing
    - USPS doesn't want to allow mailers combine SA mail with non-SA mailings.
- Is there a difference between external/internal copalletization when trying to develop a postage statement auto-finalization solution?
- A 3rd party copal company might have to run two different processes: one to copal of SA mailings and second to copal non-SA mailings. We need to revisit this topic.

- From SA standpoint - the visibility will come from the unique IMtb on the physical trays and nesting in eDoc. Regardless of what pallet the SA tray is put on - the visibility will come once the tray goes thru a tray sorter and pcs are processed.
- USPS concern is collecting mail samples using FS IMD scanners at the point of induction. If we have a mixed container SA/non
- Steve K. suggested what happens if mailer provides eDoc for the pallet -> describing the non SA and SA trays/containers. Need to revisit this discussion mixed copal mailings of non-SA/SA mailings.