

## **MTAC Task Team #15 – By/For Meeting Minutes**

<b>Date (s):</b>	8/23/2012	<b>Time:</b>	12:00 pm	<b>Project:</b>	MTAC Task Team #15
<b>Location:</b>	Dial-In: MeetingPlace: 800-932-9280 ID: 5662694				
<b>Meeting Session:</b>	Presentation Session				

<b>Meeting Invitees</b>	<b>Attended</b>	<b>Meeting Invitees</b>	<b>Attended</b>
Angelo Anagnostopoulos	X	Linda Gustason	X
Beth Bigelow	X	Lisa Bowes	X
Bob Galaher	X	Mary Anne Penner	X
Brenda Washington		Michael Tate	
Christopher Hardin	X	Michelle (Mickey) Koman	
Christopher Lien		Neil Dean	X
Dan O'Brien	X	Peter Gingrich	
Daniel McGhee		Phil Thompson	X
Dennis Farley		Phillip Parrish	
Dennis Kaylor	X	Roger Mancilla	
Dorothy Bach	X	Shawn Baldwin	X
Frank Spencer	X	Steve Krejcek	X
George Rader		Susan Redman	X
Jenny Zheng	X	Travis Wirth	
John Whittington		Wanda Senne	
Laine Ropson	X		

### **Minutes:**

#### **Thresholds for different mailing scenarios**

- There should be consideration in creating rules/ thresholds when:
  - Mail from a mail owner goes through multiple service providers before being entered with the Postal Service
  - Multiple customers with small volumes
  - Other impacts such as need for nonprofit identification
- Questions to address:
  - How much does each represent on an aggregate level?
  - How many situations/scenarios exist?

#### **Scenarios that demonstrate challenges of using By/For**

- Difficulty in identifying original mailer
  - For some mail service providers, there might be several other service providers between the first service provider and the mailer
  - Comingled
    - Some providers charge additional if a customer asks to be identified because the customer's mail will be separated
  - Combined
- Multiple uses of By/For
  - Full-Service requires By/For for data distribution

- Postage Statements use By/For for revenue attribution and authorizations such as nonprofit
  - Today, with hard-copy statements for mailings with multiple nonprofit mailers, one non-profit is identified on the postage statement to get the non-profit rate for a mailing (other nonprofits are identified through an excel spreadsheet), do all need to be identified in eDoc?
  - When only one nonprofit mailer is identified when actually there are multiple, there is incorrect revenue attribution.

**Data Distribution**

- Cast of Characters was originally created to identify multiple parties for data distribution
- No one used Cast of Characters because it was too complicated
- Needs to be simplified to be used

**Questions to be addressed:**

- What is needed for data distribution (IMb tracing, start the clock, reviewing MicroStrategy reports)?
- How are customer IDs obtained and managed?

**Next Week: Data Distribution**

- Issues that USPS has seen
- Reasons why there may be discrepancies
- Best method to easily distribute information

**Action Items:**

Item Owner	Description of Action Item	Expected Due Date