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# MTAC Workgroup #160

## Mail Owner & Nonprofit Identification in eDoc

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### Background

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Purpose: Identify nonprofit Mail Owner's participation in eDoc to validate postage rate claimed and to support USPS tracking within the previous twenty-four month period.

Objective: Electronically transmit nationwide nonprofit authorization numbers to *PostalOne!*, to replace current submission of hardcopy lists of nonprofit authorizations in given mailing.

Industry Co-Chair: Dennis Kaylor  
[DKaylor@osv.com](mailto:DKaylor@osv.com)

USPS Co-Chair: Susan Redman  
[Susan.f.redman@usps.gov](mailto:Susan.f.redman@usps.gov)

### Key Workgroup Issues to Address

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- Complexity of identifying multiple Mail Owners
- Number of mailers – hundreds of nonprofits may exist in a mailing
- Processing time for files
- Level of granularity
- Timing of information
- Managing IDs
- How to communicate intent to eliminate Ghost Permits

\*Additional issues documented in issues spreadsheet

### Meeting – November 5, 2013

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#### Agenda

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- Review 10/29 meeting minutes
- Address outstanding questions

#### Minutes

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- Reviewed minutes from 10/29 meeting
  - Discussed duplicate CRID issue (data quality issues in *PostalOne!*)
    - Specific data issues can be sent to the *PostalOne!* Help Desk – i.e. linking of permits to CRIDs, reassignment of MIDs, consolidation of duplicate customer data, etc.
    - Discussed an issue from Linda G. regarding a Permit that was reported as being linked to associated CRIDs
      - A Permit can only be linked to one CRID at any given time

- It is, however, possible for a Permit to be associated with more than one CRID due to the way historical CRID associations are stored in *PostalOne!* The Permit can still only be “linked” to one CRID. This is a database issue that will be addressed in a future release.
  - Discussed another issue regarding an eDoc error pertaining to Mail Owner being identified as a known Mail Service Provider (MSP)
    - This error is tracked on the Mailer Scorecard as the “By/For Mail Owner Identified as MSP Errors”
    - *PostalOne!* maintains a list of CRIDs that have been identified as a MSP in eDoc submissions for the last 90 days. This error is triggered when one of these CRIDs is used to identify the Mail Owner in any other eDoc submission
    - The error threshold has been set to accommodate scenarios where the Mail Owner is the MSP. Customized thresholds can be made for customers who require adjustments to the existing threshold
- Discussed outstanding questions
  - For Full-Service, how are the Mail Owner fields expected to be populated in the exception scenario (less than 5,000 pieces) where identification is not required?
    - Mail Owners will less than 5,000 pieces in the mailing do not need to be identified – no special actions need to be taken in the eDoc. The Mail Owner fields for that portion of the eDoc can be left blank
    - Further questions on this topic should be directed to MTAC User Group 1 in order for the larger audience to provide input
  - Would volume and revenue for each nonprofit be required in the future plan for identification via eDoc?
    - According to USPS rules, the volume and revenue of mail for each nonprofit entity must be communicated
      - To date, a hardcopy method of nonprofit identification has been accepted
      - In the future, identification is expected to be made in the eDoc. July 2014 has been discussed.
    - Piece differentiation between the nonprofit and for-profit rate needs to be known when eDoc is submitted (future solution) – the new proposed ANA file would have to accommodate this level of detail
    - Need to determine if the proposed file can support this level of detail
- Other items
  - USPS plans to retire the Mailer ID (MID) request excel spreadsheet process. New functionality is available on the Business Customer Gateway to make single and bulk MID/CRID requests
  - A face-to-face meeting is scheduled during MTAC week – November 21, 2013 @ 8 AM

## Proposed Agenda for Next Meeting

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- Review 11/5 meeting minutes & address questions