

Move Update Mailer Advisement Policy (Updated April 7, 2009)

The Move Update Standard requires that mailers select one of the Postal-approved ways to periodically update the addresses contained within a mailing list by comparing the address records on the mailing list against customer-filed change-of-address orders and making the necessary updates before mailing. Compliance with the Move Update Standard reduces the number of mailpieces that require forwarding or return-to-sender services.

A final rule for revision of the Move Update standard for First-Class Mail and Standard Mail mailings was published in the September 28, 2007 Federal Register. That Federal Register confirmed that these changes were effective on November 23, 2008. The Federal Register included the following changes related to the Move Update Standard:

First-Class Mail® Discount Price mailings

- Increased the required frequency of Move Update mailing list processing from 185 calendar days to no more than 95 calendar days prior to the date of mailing

Standard Mail® mailings

- Extended the Move Update Standard to include all Standard Mail (letters, flats, parcels and Non Flat-Machinables)
- Required frequency of Move Update processing is no more than 95 calendar days prior to the date of mailing

The USPS is implementing several steps, as explained below, to assist mailers in improving the quality of their addresses and in obtaining the optimum results from their Move Update compliance efforts. Until January 2010, the Postal Service is postponing the assessment of additional postage for Move Update process problems that result in change of address errors found at the time of acceptance.

Acceptance Unit Testing – Change of Address Errors Found at Acceptance

As noted above, the Postal Service will not assess additional postage at the time of mailing based upon the results of the Move Update verification. However, the Postal Service has developed and will continue to utilize this process to measure a sample of the mailing and determine the quality of the mailer's Move Update process and provide feedback to mailers. Move Update reports will be provided to mailers whose mailing is processed on the Mail Evaluation Readability Lookup Instrument (MERLIN).

The verification process will use the *PostalOne!* system and MERLIN to evaluate the quality of a mailer's Move Update change-of-address updating process. At business mail acceptance, a sample will be selected from the mailing for processing on MERLIN. In addition to the current verifications performed, the MERLIN machine will capture barcode, name, and address information into a data file that will be electronically transmitted to the National Customer Support Center (NCSC). The NCSC will process the data file using NCOA^{Link®} and will return the results to the *PostalOne!* system where it will be compiled into a Move Update worksheet/report. This process will generally occur before the postage statement is finalized in the *PostalOne!* system so that the results of the report can be discussed with the mailer. Mail pieces with addresses for which a change of address (COA) order is found will be identified with a MERLIN mail piece ID. The ID will enable the acceptance clerk to pull the subject mail pieces from the sample and provide copies of the mail pieces to the mailer. In addition to copies of the subject mail pieces, Move Update reports will be provided to a mailer whose mailing is processed on MERLIN.

The Move Update verification worksheet/report will calculate a change of address error rate for the sample tested. The calculation is based upon the number of pieces sampled, and from within this sample, the number for which a change of address should have been implemented but was not. Mailers checking *Fastforward®* or 'Multiple' Move Update method checkbox on the postage statement are subject to the results in the 95 days to 13 months date range. All other methods will be subject to the results in the 95 days to 18 months date range. The number of mail pieces that were correctly updated will determine the passing percentage. The results of the Move Update

verification test will be displayed as a passing percentage in the PostalOne! system Move Update worksheet/report.

Although acceptance units will not be assessing additional postage based on the results of the verification test described above, the Postal Service is not waiving the requirement that mailers must comply with the Move Update Standard to qualify for the presort discounts. Rather, Move Update reports will be provided to the mailers in an effort to provide them with feedback about the quality of their Move Update processes. Beginning in January 2010, the Postal Service will use this data to determine Move Update compliance and additional postage costs may be assessed at the time of mailing. In the interim, the Postal Service will evaluate verification results to establish a fair and realistic tolerance to be used at acceptance to evaluate Move Update compliance. As performance throughout the mailing industry improves, the Postal Service will tighten the tolerance levels; with the intent to update parameters every four months.

Postage Statement Certifications

The mailer's signature or that of his agent, on postage statements submitted in hard copy or in electronic formats, such as *PostalOne!* or Mail.dat, is the mailer's certification that the mailing is in compliance with the Move Update Standard. Mailers are obligated to comply with the Move Update Standard for all mailings entered at the presorted prices.

Postage statements have been revised to provide checkboxes for the mailer to indicate the specific Postal approved method(s) used to obtain change of address information for updating the addresses in that mailing. Mailers must complete this section to record the Move Update method(s) used for the mailing. Acceptance employees will review postage statements for this information. If this section is left blank unintentionally, the mailer will be asked to provide the required information before the mail is accepted. If, at the time of mailing, a *First-Class mailer* is not able to confirm that the mailing has been prepared using an approved Move Update method, the mailing will not be eligible to mail at the First-Class Mail discount prices. The mailer will have the option to withdraw the mailing or to pay additional postage based on the First-Class Mail single-piece price for every piece in the mailing. Standard Mail mailers are also expected to comply with the Move Update standard. The Postal Service will continue to work with Standard Mail mailers to adopt a suitable method for meeting the standard. Lacking any other immediate means, Standard mailers should consider use of an ancillary service endorsement on their mailings. However, if a mailer certifies that the mailing was prepared using an approved Move Update method, the acceptance unit will not assess any additional postage for change of address errors found at the time of mailing.

The Postal Service reserves the right to use audit or other procedures to verify that any mailing entered at the presorted rates actually complied with the Move Update Standard. Additional postage may be assessed if the results of the audit or other procedures indicate that the mailing was not qualified for the discounted prices.

USPS Guide to Accessing Move Update Reports

USPS has posted a "Guide to Accessing Move Update Reports" on ribbs.usps.gov. This illustrated guide demonstrates verifications results, such as number of pieces tested, total Change of Address (COA) updated by mailer, and total COA not updated by mailer. The guide also describes how to gain access to *PostalOne!*. To view the guide, customers can visit ribbs.usps.gov, click on "Move Update," then click on "Latest News." The guide is listed in the blue box titled "Important Links." If your mailing is being presented at an acceptance site that uses MERLIN for verification and you are not receiving the Move Update report, you may send an email to moveupdatereports@usps.gov. Please include the city state and ZIP Code of the location where you present your mailing.

Performance Based Verification:

Performance-Based Verification (PBV) has been deployed across the nation. A list of Business Mail Acceptance unit sites where PBV has been deployed is also available at ribbs.usps.gov. The link to the list of sites is under the link to the guide mentioned above.