

MTAC Focus Group Sessions

Payment/Acceptance

Standard Mail

May 16, 2012

- **Industry Concerns**
 - **Dynamic Method to Validate Mail Owner MIDs and/or CRIDs**

- **Payment/Acceptance Updates**
 - **Full Service Simplification / TEM Simplification**
 - **eInduction Updates**
 - **Mail Anywhere**
 - **Seamless Acceptance Updates**
 - **eVS Updates**
 - **QR Barcode Enrollment / Timing of eDoc Submission**
 - **POSTNET Retirement**
 - **Picture Permit Imprint**
 - **Mobile Barcode Incentive**
 - ***PostalOne!* Testing / Environment**
 - ***PostalOne!* System Performance**
 - **Help Desk Support**

- **Mail Owners and Mail Service Providers may have a need to validate CRIDs and/or 9-digit MIDs to ensure they are valid and confirm ownership.**
- **Mail Agents must have access to the Mailer ID tool in order to use this validation process.**
- **MIDs may be validated through the address book function in the “Mailer ID” tool.**
- **A user can validate ownership (name and address) of a CRID by using the “Add a Service” tool.**
- **Refer to the Quick Step Guide to CRID and/or 9-digit MID Acquisition on RIBBS for detailed instructions.**

MTAC Focus Group Sessions

Payment/Acceptance

Packages

May 16, 2012

- **Industry Concerns**
 - **Consideration to add eVS as Payment Method for Full Service Flats**
 - **Electronic Interface to Allow 3rd Party Service Providers to Pay Annual Mailing Fees**

- **Payment/Acceptance Updates**
 - **Full Service Simplification / TEM Simplification**
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First Class Mail

May 16, 2012

- **Industry Concerns**
 - **Seamless Concerns / Seamless for Small Business**
 - **Full Service Definitions (Full Rate / Non-Auto) / Single Piece**
 - ***PostalOne!* Releases**
 - **Communications & Training**
 - ***PostalOne!* Testing / Environment**
 - ***PostalOne!* System Performance**
 - **Help Desk Support**
 - **IDEAlliance / Mail.DAT**
 - **Enterprise Postage Account Management**

- **Payment/Acceptance Updates**
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Periodicals

May 16, 2012

- **Industry Concerns**
 - **Air Box Enhancements for eDoc and eInduction Environments**
 - **eInduction Container Process to Catch Pallet Unload Errors**
 - **Plan for Systems to Handle Larger PDR/PBC Files**

- **Payment/Acceptance Updates**
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- **Air Box Options**

- Container price for Air Box
 - Presort to each Air Box
 - Mail.dat/Mail.xml file submission
- Electronic Container Manifest (*Consolidator Option*)
 - Postage Statement ID
 - Locale Key
 - Unique IMCb for each Air Box.
 - Mail.xml message to *Posta/One!* linking newly created IMCb to postage statement ID.
 - eInduction Guide for Mailers (Section 8.4)
- Paper 8125

- **IMR**
 - IDEAlliance has marked the .imr for removal in the 13-1 specification
 - Unsupported after January 2013 – Full Service Release 12
 - Support migration to PDR
- **Planning for Increased Submissions with PDR/PBC**
 - Capacity Planning
 - Storage Planning
 - Performance Testing

- **TEM Certification for Vendors**
- **Cancel postage statement from the *PostalOne!* dashboard**
- **Define simple mailing criteria**
- **Bulk MID/CRID process**

Working with MTAC, we have simplified the TEM certification process for both mailers and software developers/vendors.

Software Developer/Vendor Process

1. Fill out Enrollment Tool and send to Help Desk
2. Obtain “Testing Package”
3. Gain Access to TEM
4. Generate, Submit and Review Test Files
5. Review Finalize Postage Statements and Review Outputs of Test Scenarios
6. Record Capabilities and Obtain Certification

Mailer Process

1. Fill out TEM Enrollment Tool and send to Help Desk
2. Gain access to and TEM
3. Generate, Submit and Review Test File
4. Notify the USPS Help Desk

- A tool has been developed to help mailers and software developers identify the appropriate test scenarios.



TEM Enrollment Questionnaire

Start Here

Please click on the scenario that relates to you:

Vendors

[Mail.dat Vendor](#)
[Mail.XML Vendor](#)

Mailers

Mail.dat Mailer
Mail.XML Mailer

Please Notice:

Before completing this questionnaire, Macros must be enabled.

To Enable Macros, click on Tools > Macro > Security and change the security level to Medium. You will then need to re-open Excel and click "Enable Macros" when prompted.

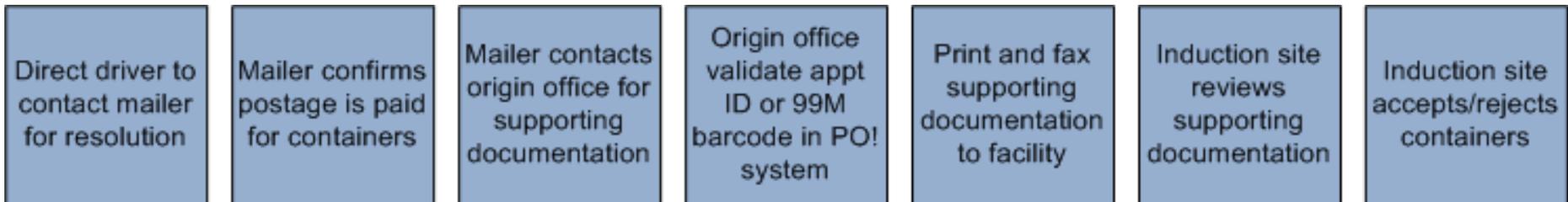
- After selecting the appropriate category, a series of yes/no questions are used to identify the appropriate testing scenarios
- Detailed instructions are included to facilitate easy testing
- Each scenario includes instructions on how to review results

• Pilot Observations

- Almost 11,000 eInduction containers submitted in April
- Consolidated Postage statements
 - Slow upload of container data to SV
 - Implementing fix to upload when in “CON” status
- Driver wait time reduced
- Paperless with Valpak in Tampa



- If USPS unloads container at wrong stop, issue is resolved on back end
- Only an issue for mailers that choose to accept mis-shipped containers
- **Process to Resolve Containers**



- **Documentation to Resolve Containers**
 - 100% eInduction
 - Print screen of *PostalOne!* Container Detail Report
 - Mixed Load
 - eInduction Containers: Print screen of *PostalOne!* Container Detail Report
 - Non-eInduction Containers: 8125/8017
 - Origin faxes to Induction Site

Home > Reports > Shipping Summary Search > Appointment Summary Report > Container Detail Report												Today: May 14, 2012 05:27:43 PM	
Finance Number : 224560													
Planned Appointment Summary													
Appointment Number:		112519519		Total Containers:		29		Scheduled Arrival Date/Time:		05/04/2012 09:00:00 AM			
Origin Plant Location:				Destination Entry Location:		TAMPA L&DC FL							
Induction Appointment Summary													
Entry Office:				Total Containers:		0		Arrival Date/Time:					
Transport Company:								Started Unload:					
USPS Receiving Employee:								Ended Unload:					
Mail Expeditor/Closer Clerk ID:				Shipment Status:				Departure Date/Time:					
Job Summary Information													
Job ID:		15660501		Mailing Group ID:		107043296		Class:		3			
Job Name:				Process Cat:		CT		Total Pieces:		121,370			
Mail Preparer:		DIRECT PRESS		Rate Authorized:		TBD		Total Weight:		25532.77			
Permit:		DIRECT PRESS (277)						Total Container Count:		29			
Shipment Results													
Scheduled Containers:		29		Returned Containers:		0		Containers Scanned:		0			
Missing Containers:		0						Extra Containers:		0			
Release Manually	Manually Released Reason	Pre-Induction State	Container Barcode ID	Destination Facility	Destination Locale Key	Rate Level	In Home Date	Start the Clock Date	Unload Status	Date/Time Unloaded	Induction	Problem Description	Problem Resolution
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					
		C	95M10685400000030077	335	007646	X	05/04/2012 12:00 AM	05/04/2012 12:00 AM					

- **Move to paperless with other mailers**
- **Review by SOX and Network Operations for compliance and standardization**
- **Begin Rollout October 2012**

- **Solution**

- The “Mail Anywhere” Business model allows for the use of a single permit, enabling a customer to present mailings with 90% or more Full-Service mailpieces at any *PostalOne!* site.
- A customer can use the same permit at every mail entry site.
 - One trust account in one location to pay for all mailings nationwide, or
 - Permits linked to a CAPS account to utilize electronic payment methods.

- **Benefits**

- Simplifies Mailing Process
 - Maintain a single permit and centralized account to enter and pay for all mailings
 - Manage One permit versus multiple permits
 - Enables greater flexibility in production of mailings
- Local Permit Number or Company Imprint indicia may be used at any location

Eligible Full-Service Mail Classes

- First Class – Cards, Letters & Flats
- Standard – Letters & Flats
- Bound Printed Matter – Flats

Eligible Permit Types

- Permit Imprint
- OMAS Imprint
- Precanceled Stamps w/ ADDPOS Account for additional postage
- Metered w/ ADDPOS Account for additional postage

Statement Types

- Single Permit
- Combined Mail
- Comail

Submission Methods

- Mail.dat
- Mail.XML
- Postal Wizard

- **Mailers must:**

Meet Full-Service Authorization

- Mailers must meet and pass Full-Service/TEM authorization
- Mailings must have 90% or more Full-Service pieces

Demonstrate Full-Service Compliance of at 7 consecutive days

- Valid By/For information (MID, CRID)
- Valid barcodes with MID/Service Type Code
- Unique barcode
- Valid entry facility
- Copal mailers must submit accurate OCI files
- Ship dates must be accurate (not more than 2 days prior to the postage statement finalization date)
- First-Class mailers use a CSA & meet the separation criteria

Authorization Process

- Mailers must be authorized through the *PostalOne!* Help Desk
- Contact the Help Desk via email at postalone@usps.gov
 - Subject Line: Mail Anywhere Participation Request
 - Body of email:
 - CRID
 - BSA/Contact Name
 - Company Name
 - Business Address
 - City, State & ZIP+4
 - Permit #, name, city, state, Zip+4

- **Seamless Participation Criteria**

- Ability to switch to Seamless at site level for class and processing category
- All mail within a container must be seamless
- Unique Barcodes applied to all Containers, Trays, and Pieces
- eDoc for all mailings: Mail.dat, Mail.XML or PW
- Piece information provided through pdr, .pbc or MailPieceBlock
 - No downgrading mailpiece with FS STID to Basic rate without including piece information in eDoc
- Accounts are fully funded at Postage Statement Mailing Date
- Participate in eInduction

Manual Sampling

- Payment Method
- Content
- Piece Weight
- Presort
- Barcode Construct
- Undocumented

- **Manual Sampling**

- BMEU clerks will capture verifications as mail is inducted
- Sample requests will be triggered by *PostalOne!* and captured on the FS-IMD device
- Samples will be compared to eDoc to determine the verification results
- Verification results will be displayed in reports giving details of the samples

Processing

- Presort
- Entry Location
- Barcode Scan Rate
- Move Update
- Delivery Point
- Undocumented

- **Processing**

- Processing scans captured during mail processing will be used to verify the makeup of the mail
- Processing Scans will be compared to eDoc to determine the verification results
- Verification results will be displayed in reports showing scan rate as a percentage and actual pieces in error

Manual Sampling

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Verification	Level	Approach
Postage Payment Method	Mailpiece	Compare clerk entered postage payment method on the FS-IMD to the postage payment entered on the eDoc
Content	Mailpiece	Compare clerk entered content on the FS-IMD to the content entered on the eDoc
Piece Weight	Mailpiece	Compare weight recorded on scale attached to FS-IMD to the weight entered on the eDoc
Presort	Mailpiece	Compare nesting captured on FS-IMD to the sort level on the eDoc
Barcode Construct	Container, Handling Unit, Piece	Barcode construct and readability as captured on the FS-IMD
Undocumented	Container, Handling Unit, Piece	Compare container, handling unit and mailpiece scans on the FS-IMD with the unique MID to identify any that are not on eDoc

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Processing

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Verification	Level	Approach
Presort	Mailpiece	Mailpieces that are found in operations with a different handling unit than paid in eDoc
Entry Location	Container, Handling Unit	eDoc comparison of the induction location to the MDF; comparison of the SV unload scan facility to the MDF
Barcode Scan Rate	Container, Handling Unit, Piece	% of containers, handling units or pieces with scans over the total number in the eDoc
Move Update	Mailpiece	Mailpieces that receive a UAA notice after 95 days has elapsed
Delivery Point	Mailpiece	Mailpieces that fail Delivery Point Verification based on the 5, 7, or 11 digit delivery point in the IMb
Undocumented	Container, Handling Unit, Piece	Compare container, handling unit and mailpiece scans to identify any that are not on eDoc

- **Communication plan for eVS mailers implemented late February 2012**
 - Issues that are identified either internally or externally affecting multiple mailers will be included on the eVS issues list for discussion at the eVS/PTS MTAC user group meetings.
 - Communication via email for urgent issues to will allow the mailers to take the necessary actions to minimize disruption to their business. The e-mail notification will include a description of the issue and a status of the resolution.
 - Directly after a release
 - After identification/escalation to the Help Desk

- **Tracking Number Overlabeling/Aliasing**
 - Proposed - New file version to accommodate a link between the original label number and the new overlabel number
 - Determined plan to proceed

- **eVS Content on Bound Printed Matter and Media Mail**
 - Discussed Proposals
 - Still in process

- **Destination Entry Validation will still appear in manifest confirmation report and a new report where they can be managed as a monthly adjustment for NDCs & SCFs**
- **NEW!** Daily Postage Statement Summary report available for view or download
- **NEW!** 3rd-Party Payment option for approved Logistics Manager and Mail Owner relationships
 - Ability to use non-eVS mailer owned permits for payment
 - Have by/for visibility
- **Additional internal enhancements for sampling quality and monthly reconciliation processing**

- **NEW!** Express Mail Flat Rate Padded Envelope
- Improve Navigation for Transaction ID-EFN Pairs
- Accept the Certified MID List from PTS (including certified date)
- **NEW!** Report for content audit samples

- **2% Discount on commercial mail containing a mobile barcode leading directly to a website**

- **Promotion Dates:**
 - Registration on BCG Incentive Tool: May 1 – August 30
 - MSP Registration begins June 10
 - Promotion Period: July 1 – August 31
 - Start eDOC submission date: June 10
 - Mailing Date of July 1 or later
 - Any qualifying mailing that is accepted and paid for prior to July 1st is not eligible for the discount.
 - Any qualifying mailing that is finalized and paid after August 31st is not eligible for the discount.

- **Eligible Mail Classes:**
 - Standard Mail® letters and flats
 - Nonprofit Standard Mail letters and flats
 - First-Class Mail® presort and automation letters, cards and flats

- **Online Enrollment > New Business Customer Gateway (BCG) Users**

If you are a new to the Business Customer Gateway, you must first create a business account



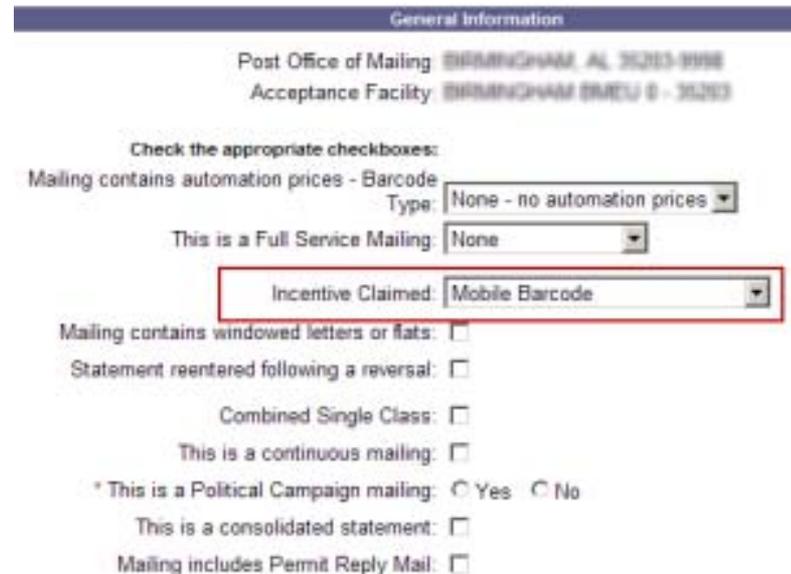
If you are already using the BCG, complete the four steps to enroll for an incentive program:



- **Additional registration process for both Mail Owner and MSP is available on the RIBBS**

2012 Mobile Commerce & Personalization Promotion Registration Requirements

- Enrollment using Postal Wizard, Mail.dat (or Mail.XML) enables Mailing Agents to enroll their clients using eDoc. During postage statement finalization, *PostalOne!* will validate that the MSP CRID in the eDoc is enrolled as an MSP and create a linkage record to the mail owner in the new Program Registration system.
- Mailers will use a new indicator (MI or MB) in the eDoc to claim the discount. The Mobile Barcode incentive will be displayed in the electronic statement, General Information section as an Incentive Claimed selection in *PostalOne!*.
- A dropdown menu will appear for mail owners and/or mailing agents who are registered. For hard copy entered statements, it should not be used except under specific conditions e.g. *PostalOne!* goes down.



General Information

Post Office of Mailing: BIRMINGHAM, AL 35203-8998
Acceptance Facility: BIRMINGHAM (METU 0 - 35203)

Check the appropriate checkboxes:

Mailing contains automation prices - Barcode Type:

This is a Full Service Mailing:

Incentive Claimed:

Mailing contains windowed letters or flats:

Statement reentered following a reversal:

Combined Single Class:

This is a continuous mailing:

* This is a Political Campaign mailing: Yes No

This is a consolidated statement:

Mailing includes Permit Reply Mail:

- **This year's eligibility details**

- eDoc is required: Mail.dat, Mail.xml or Postal Wizard.
- Mail Owner and Mailing Agent must be identified in the eDoc .
- Only the following permit types are eligible: Permit Imprint, Metered, Precanceled Stamp. Ghost permit can be used to identify the Mail owner.
- Not eligible are First-Class Mail paying single piece prices are not eligible, Periodicals (includes Pending Periodicals mail), Bound Printed Matter, Media Mail, First-Class Mail and Standard Mail parcels.
- Combined, commingled and co-mailings are eligible for the discount provided a separate postage statement is submitted for those pieces qualifying for the discount. All pieces represented on the statement must have the mobile barcode.
- Mailings of automation letters or flats must have the IMb barcode. Mailpieces with the POSTNET™ barcode claiming automation prices will not be eligible for the incentive.

- **Information on RIBBS**
- **<https://ribbs.usps.gov/index.cfm?page=mobilebarcode>**
- **Promotion Requirements Document**
- **FAQs**
- **User Guide for Mail Owner and MSP**
- **For inquiries, Email: mobilebarcode@usps.gov**

- **May 2012**

- Mail Service Provider's Quick Service Guide (document) – *new*
- CRID/MID Acquisition Quick Step (document) – *new*
- Roadmap to Intelligent Mail (document)
- Beginner's Overview to Intelligent Mail (document)
- Transition to IMb – internal (powerpoint)
- Initial Steps for Mailers - external (presentation)
- MIDS and CRIDs (powerpoint)
- The Business Customer Gateway (powerpoint)
- Service Type Identifiers (STIDs) (powerpoint)
- IMb Fact Sheet (document)

- **There are three ways to acquire CRIDs and/or MIDs**

- Single CRID/MID Acquisition via Business Customer Gateway
 - This method can only be used if you are the Mail Owner.
 - MIDs acquired through the Business Customer Gateway are assigned one at a time.
- Bulk Acquisition via Manual Data Request
 - This method allows Mail Service Providers to acquire MIDs on behalf of others.
 - CRIDs and/or 9-digit MIDs may be generated one at a time, or in bulk.
 - Mail Owners may acquire multiple CRIDs and/or 9-digit MIDs without accessing the Business Customer Gateway Mailer ID system /using Mail.XML messaging.
 - Customers provide an Excel spreadsheet (in the defined format) requesting up to 500 CRIDs and/or 9-digit MIDs per spreadsheet.
- Bulk Acquisition and Verification via Mail.XML
 - Mail Service Providers may acquire multiple MIDs on behalf of others.
 - Mail Owners may generate CRIDS and nine-digit MIDs in bulk (or one at a time) without accessing the Business Customer Gateway.
 - If a CRID or nine-digit MID already exists, the USPSMIDQueryRequest and USPSCRIDQueryRequest Mail.xml response messages will provide the existing CRID and nine-digit MID information.
 - These messages can be used to validate mailer information prior to eDoc submission.

- **Picture Permit Imprint (PPI)**
 - Pay Permit Imprint fee and Annual fee as applicable
 - Complete PPI application and obtain USPS authorization
 - 100% Picture Permit Imprint
 - Full Service Mailing
 - May include basic service pieces

- **Single Client Job**
 - 100% PPI
 - Full-Service Mailing
 - May include Basic Service pieces
 - May include machinable and single-piece as part of the mailing
 - Normal Acceptance and Verification

- **Combined Mailings (MLOCR/BCS)**
 - Master Postage Statement
 - Separate Postage Statement for PPI/Client (must be 100% PPI)
 - Profiled Separately – Client listed on Customer Mail Report
 - PPI pieces verified in conjunction with MPCV
 - Provide a report by Client, Logical ZIP Code, and number of pieces
 - Non-Auto mailpieces may be submitted as:
 - Machinable mailing supported by electronic documentation and separate postage statement by client
 - Separate identical weight presort mailing
 - Single-piece prepared in groups of 100 by ounce increment

- **Help Desk**

- Gathers specific information
- Troubleshoots issue
- Escalates issue to appropriate Tier 2 (Development Leads)
- Coordinates activities with initiator through closure of ticket:
 - Customer Confirms Issue Resolved, or
 - External Trouble Report (ETR) is logged

- **Production Issue (ETR) Logged**

- Determine workaround, if feasible
- Prioritize ETRss
 - Financial/SOX Impact
 - Operational Impact
 - Temporary workaround available
- Schedule Correction
 - Next Scheduled Release, if possible
 - Future Release
 - Emergency Patch, if required

- ***PostalOne!* MTAC User Group #1 (weekly meetings)**
 - Average attendance is between 75-100
 - Share the current list of active and inactive issues
 - Prioritizes the new ones
- **Established new *PostalOne!* Improvement Team**
 - Has been working on address internal issues
 - Now will expand and work with Industry members of UG #1 to prioritize backlog of external issues
- **Cross-functional Integration at USPS**
 - Multiple recurring meetings every week between Finance, SOX, PPTS, and IT
 - Review and Prioritize Issues/Resolutions
 - Issues are actively committed to upcoming releases and patches