

# **MTAC Focus Group Sessions**

## **First Class Mail**

May 2013

- **MicroStrategy Reports – What’s New?**
- **Clarity on Full-Service Requirements/Verification**
- **Incentives Architecture**
- **Tech Credit Update**
- ***PostalOne!* Help Desk Integration with eBSN**
- **By/For Precedence for Postage Statement Generation**
- ***PostalOne!/SASP* Update**
  - **Gaps in Full-Service**
  - **FY14 Structured Release Cycle**
  - **Contingency Plan**
  - **Infrastructure – SASP Update, Pre-Prod**
- **eInduction and Seamless Acceptance Update**
- **Mail Anywhere & Permit Fees Retirement Next Steps**

- **The Mailer Scorecard provides a dashboard view summarizing performance**
- **Allows comparison across facilities**
- **Conditional formatting provides a trending view across months**
- **Drill reports provide a way to determine specific mail preparation errors**
- **Available for any company that submits electronic documentation**
  - Data grouped by eDoc submitter CRID

## Mailer Scorecard

### FEBRUARY 2013

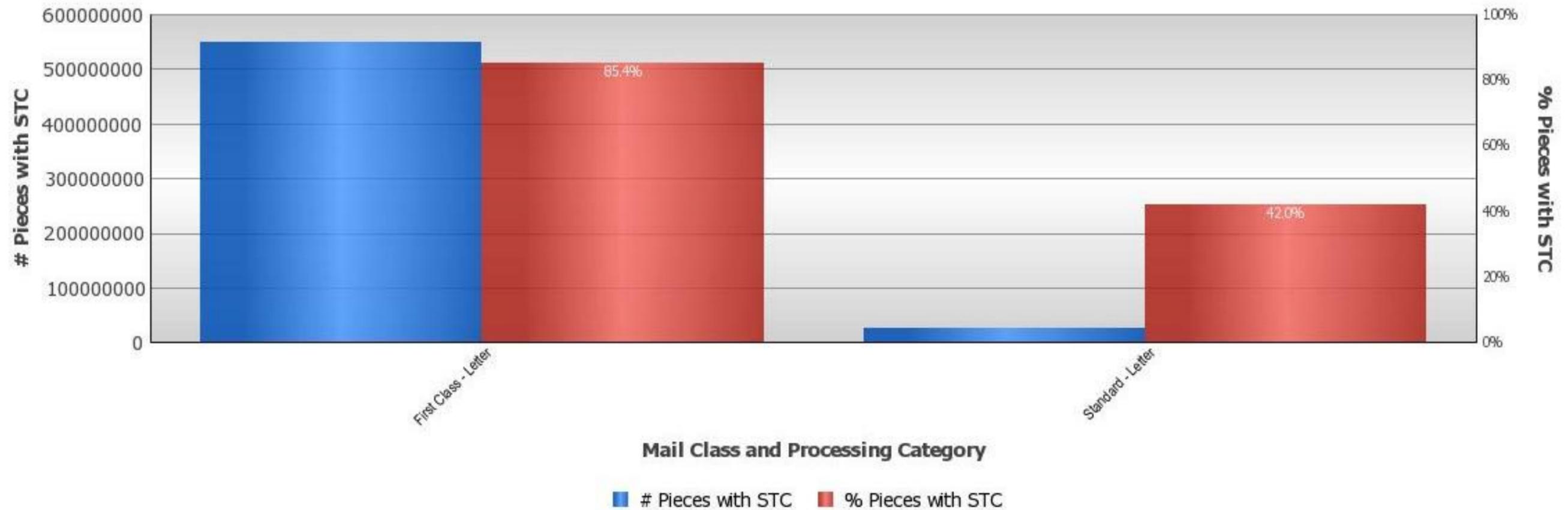
Full-Service Compliance	eInduction	Seamless	Manual Sampling	Entry Point Verification	Mailer Profile
<input type="radio"/> # Metrics	<input checked="" type="radio"/> % Metrics				
<b>Full-Service Compliance</b>					
<b>eDoc Submitter</b>	<u>20400555</u>	<u>123456</u>			
	<u>Chicago Presort Company</u>	<u>St. Louis Mailing Management Inc.</u>			
# Containers	157	12,427			
# Handling Units	3,461	182,875			
# Pieces	1,352,849	47,471,183			
% FS Mail Volume	100.00%	99.38%			
% OCI Not in Error	100.00%	91.33%			
% Container MID Not in Error	100.00%	100.00%			
% HU MID Not in Error	100.00%	100.00%			
% Piece MID Not in Error	100.00%	99.98%			
% STID Not in Error	100.00%	100.00%			
% By/For Not in Error	99.84%	83.55%			
% By/For Matching Not in Error	82.62%	77.69%			
% Container Barcode Uniqueness Not in Error	100.00%	100.00%			
% HU Barcode Uniqueness Not in Error	99.83%	100.00%			
% Piece Barcode Uniqueness Not in Error	10.07%	99.99%			
% Container Entry Facility Not in Error	100.00%	100.00%			
% Container CSA Not in Error	100.00%	100.00%			
% Early Scheduled Ship Date Not in Error	N/A	100.00%			

- **Mailer Scorecard**
  - New Mailer Profile View
    - Mail volume, mail class and processing category usage, eDoc submission methods
  - CRIDs ordered by business name
  - Additional fields on Seamless & eInduction tabs
  - Error counts updated to include only errors
  
- **Tooltips updated throughout all reports**

<b>Mailer Scorecard</b>		
		<b>FEBRUARY 2013</b>
		Full-Service Compliance    eInduction
Mailer Profile		
eDoc Submitter	20400555	123456
	Chicago Presort Company	St. Louis Mailing Management Inc.
# Pieces	494	33,699
# Full-Service Pieces	492	29,491
# Non-Full-Service Pieces	2	4,208
% First-Class - Letters & Cards	2.63%	69.56%
% First-Class - Flats	39.88%	6.87%
% First-Class - All Other Categories	0.81%	0.00%
% Standard - Letters & Cards	5.26%	0.59%
% Standard - Flats	0.00%	4.74%
% Standard - All Other Categories	0.00%	0.00%
% Periodicals - Flats	52.23%	0.55%
% Periodicals - All Other Categories	0.00%	17.32%
% All Other Classes - Letters	0.00%	0.00%
% All Other Classes - Flats	0.00%	0.36%
% All Other Classes - All Other Categories	0.00%	0.00%
% Mail.dat Jobs	100.00%	100.00%
% Mail.XML Jobs	0.00%	0.00%
% Postal Wizard Jobs	0.00%	0.00%
Total Discounts Received	\$0.00	\$0.00
Total Number of Full-Service Jobs	6	22
% Full-Service Jobs IMsb	0.00%	0.00%
% Full-Service Jobs SST	0.00%	0.00%

- **Start-the-Clock**
  - Mail Class and Processing Category

**Pieces Receiving STC by Mail Class and Processing Category**



Mail Class ▲	Processing Category ▲	# Containers ▼	# Containers with STC ▼	% Containers with STC ▼	# Handling Units ▼	# Handling Units with STC ▼	% Handling Units with STC ▼	# Pieces ▼	# Pieces with STC ▼	% Pieces with STC ▼
First Class	Letter	4,322,718	3,967,295	91.8%	251,836,650	227,406,969	90.3%	644,161,553	549,812,808	85.4%
Standard	Letter	225,436	88,102	39.1%	10,197,192	3,907,409	38.3%	60,678,944	25,466,167	42.0%

- **Seamless Acceptance**

- Verifications

- DPV errors were re-enabled
- Add new verifications (Presort, Non-Full-Service)

- Detailed Error & Error by Type

- Separate results by mail class and processing category
- Reorganize report columns to make investigations easier
- Added Container level & Destination ZIP to Detailed Report

- New Report: Barcode scan rate by entry facility

- Modify Seamless Acceptance Dashboard

- Include Undocumented pieces on main view
- Remove projected errors

- **Automation Verification – Existing Verifications**
  - Mailpiece preparation including dimensions, shape, weight, and flexibility
  - Barcode quality
  - Content
  - Presort makeup
  - Automation eligibility
- **Existing Thresholds Apply**
- **Mailing Falls Below Thresholds**
  - Returned for Rework
  - Additional Postage at the applicable rates in January
  - Examples:
    - Poor Barcode quality = % of pieces at Non-Automation Rates
    - Poor Presort quality = % of pieces at FCM Single Piece Rates

- **Full-Service Acceptance - Existing Verifications**
  - Documentation not submitted electronically
  - Container placards are inside or covered by shrink-wrap
  - No Intelligent Mail container barcodes on the container placards
    - Initial Sample = 3 Container
    - If in error, select additional 3 containers
    - More than 2 total errors = Failure
  - No Intelligent Mail tray barcodes on the tray/sack labels
    - Initial Sample = 5 Handling Units
    - If one or more in error, select additional 3 Handling Units
    - More than 3 total errors = Failure
  - No Intelligent Mail tray barcode on the mailpieces
    - Initial Sample = 30 Mailpieces
    - 4 or more in error = Failure
  - Mailing Falls Below Thresholds
    - Returned for Re-work
    - Additional postage at the non-automated rates in January

- **Full-Service Electronic Verification - New Verifications**

- Validation of the Information contained in eDoc
- Data is aggregated over a one-month period
- Displayed in the Mailer Scorecard by CRID
- Develop reasonable thresholds
  
- In the October release, *PostalOne!* will display the projected invoice from full-service electronic verification failures
  - Removal of full-service and automation rate
  - Only mailpieces with verification errors above the preliminary threshold
  - Validate with Industry

- **Service Type ID:**

A service type ID that is provided in the IMb and contained in the eDoc is appropriate for the class of mail and service level of the mailpiece.

- **Mailer ID:**

A mailer ID that is provided in the IMb, IMtb, and/or IMcb and contained in the eDoc is valid (registered with the USPS Mailer ID system).

- **Unique Container Barcode:**

An IMcb contained in the eDoc is unique across mailings for 45 days.

- **Unique Tray Barcode:**

An IMtb that contained in the eDoc is unique across mailings for 45 days.

Exception: Small mailings that have fewer than 10,000 pieces can use the same serial number for all trays in the mailing, if postage is affixed to each piece at the correct price, or the pieces are of identical weight and separated by price.

- **Unique Piece Barcode:**

An IMb contained in the eDoc is unique across mailings for 45 days.

Exception: Small mailings that have fewer than 10,000 pieces, where postage is affixed to each piece at the correct price or each piece is of identical weight and the mailpieces are separated by price, can use the same serial number for all pieces in the mailing. In this case, uniqueness is required for the serial number at the mailing level. A different serial number should be used for each mailing and the serial number cannot be repeated within 45 days.

- **Co-Palletization:**

Co-palletized mailings must have eDoc submitted by both the origin facility and the consolidator to describe the movement of trays and sacks.

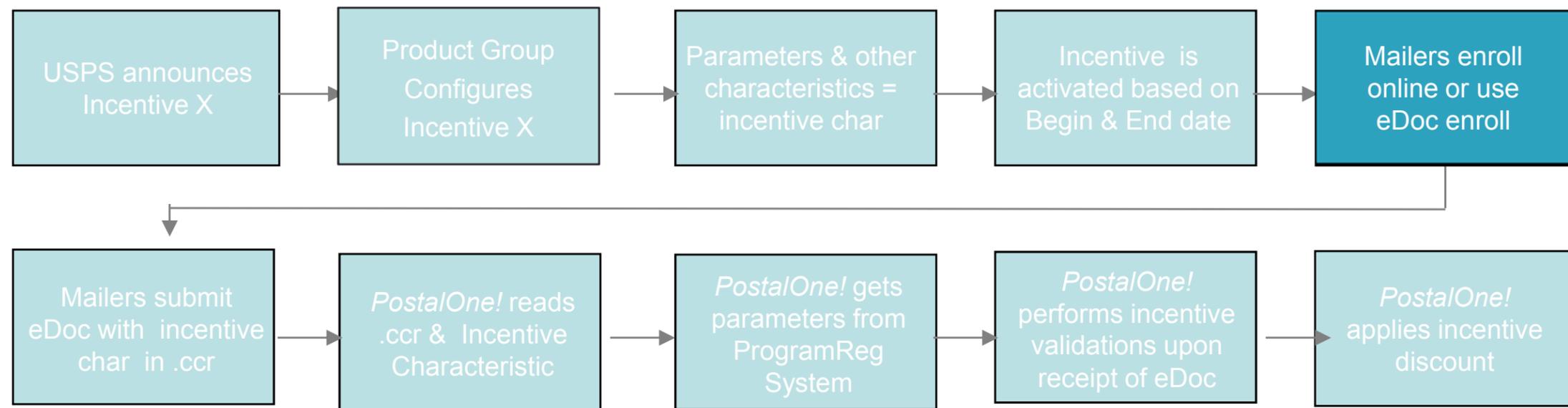
- **Entry Facility:**

Entry facility provided in eDoc (Locale key or ZIP Code) is a valid USPS facility.

- **By/For:**

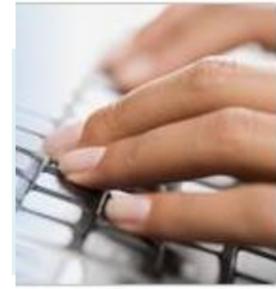
Electronic documentation is checked to ensure that the mail owner and mailing agent identification are accurately populated.

- **Postal Service incentive activation capability within hours i.e., mobile barcode incentive**



## Mailers/Participants:

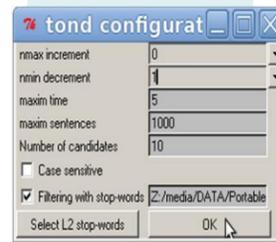
- Determine Eligibility
- Enroll
- Create Mail
- Submit eDoc
- Receive Discount



## Enrollment

- Online
- eDoc option for Mailing Agent clients

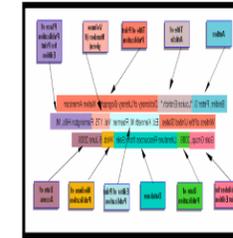
*CustReg/BCG/PostalOne!*



## Incentive Parameters

- Enrollment Begin and End dates
- Promotion Begin and End dates
- Mail class
- Processing category
- Shape (Letter, Flats, and Parcel)
- Machinability/Preparation (Automation, Non-automation, etc.)
- Sortation (5-digit, 3-digit, CRRT-SAT etc.)
- Mail Entry (DNDC, DDU, etc.)
- Full-Service or IMb
- Discount structure type
- Incentive char code

*Program Registration*



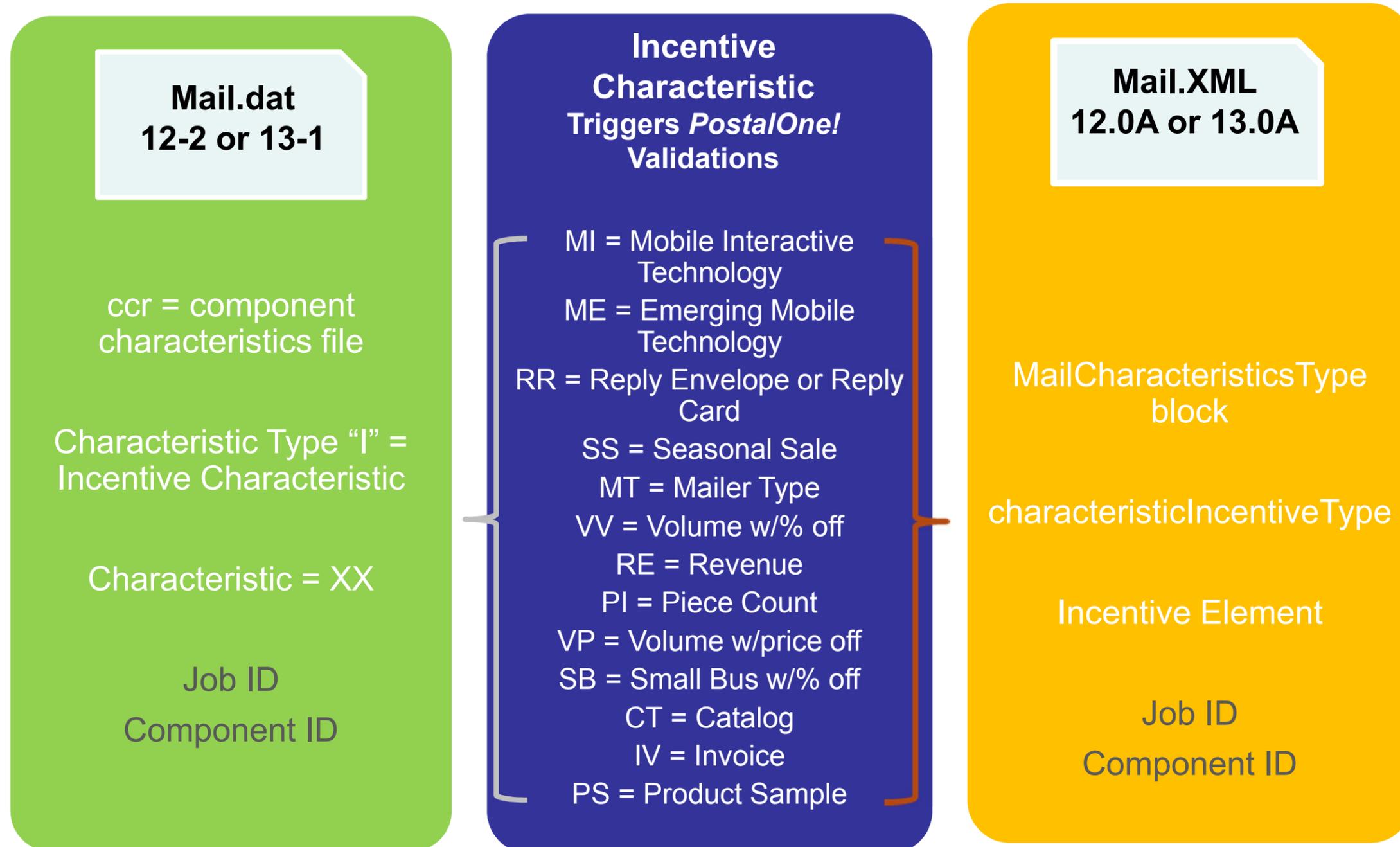
## eDoc Requirements

- Postal Wizard incentive selection
- Mail.dat and Mail.XML files and values
- .ccr Incentive characteristic type
- MailCharacteristicsType block, Incentive Types
- Valid CRID / MID
- By/For
- Full-Service or Automation mailing
- Validations

*PostalOne! System*

- **Mail Owners and Mailing Agents can enroll Online**
- **Mailing Agents can enroll their clients through eDoc. Such clients may be permit holders but do not generally use the BCG**
- **How does eDoc enrollment work?**
  - Mailing Agent enrolls as a Mail Service Provider via BCG Incentive Programs service
  - Mailing Agent CRID in BCG profile is same as what is populated in Preparer “By” field of the eDoc (*PostalOne!* performs this validation)
  - Mailing Agent identifies Mail Owner in “For” fields of the eDoc
  - Mailing Agent can enter his permit in the Permit Holder field and get the discount at the time of mailing
  - Mailing Agent can enter his client’s permit in the Permit Holder field and client will get the discount at the time of mailing

- **Mail.dat .ccr or Mail.XML MailCharacteristicsType block** must be submitted in the electronic file to claim incentive



- **Postage calculation and discount logic supported by *PostalOne!* today are configurable**
- **No need for structural statement changes for PS Form 3600FCM and 3602R/N**
  - First-Class Mail (Cards and Letters)
  - Standard Mail (Letters, Marketing Parcels)
- **Four discount structures functional for all eDoc methods**
  1. Discount columns on postage statements support % off subtotal at the individual line level
    - Mobile Barcode Incentives
    - Sample Sale (Marketing Parcels)
  2. Discount columns on postage statements support flat amount off piece price at the individual line level
  3. Flat dollar amount off from total postage amount
    - Earned Value
  4. Extra Service Fee Waiver
    - Picture Permit Imprint

- **Mail Owner only participation**
- **Mailing Agent must be enrolled as MSP to use eDoc enrollment**
- **Mail Owner when also permit holder must be enrolled for own statement submissions using enrolled CRID**
- **By/For identification present in eDoc**
- **Only one incentive can be called out in the eDoc and applied to a given postage statement**
- **Incentive (Characteristic) must be active**
- **Postage Statement Generation Variables used to create separate statements to meet rules**
  - All pieces in statement must contain mobile barcode
  - All pieces in statement must contain Picture Permit Imprint

- **List Updates: Feb – May**
- **Final List Validation: May 20, 2013**
- **Final Customer letter notification: May 24, 2013**
- **Redemption Period (Subject to PRC approval):  
June 1, 2013 – May 31, 2014**

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

### Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



PostalOne!® Dashboard

### Your Account Settings

Welcome SUE

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**Profile**

- Profile
- Request Access
- Request Status

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**User Management**

- Request Inbox
- Manage User Access

### Account Service

- [Balance & Fees \(PostalOne!\)](#)
- [Manage Permits \(PostalOne!\)](#)
- [Incentive Programs](#)
- [Verification Assessment Evaluator \(PostalOne!\)](#)

### Design & Prepare

- [Automated Business Reply Mail](#)
- [Intelligent Mail Services](#)
- [Mailer ID](#)


HOME | HELP | CUSTOMER CARE | SIGN OUT

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Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Mailing Reports

## Mailing Reports

- [View Transactions](#)
- [Mailing Summary Report](#)
- [Pending Postage Statements](#)
- [Mail Quality Reports](#)
- [Statement of Ownership](#)
- [Issue Level Postage Statement](#)
- [Induction Activity Report \(eInduction\)](#)
- [Publication Report](#)
- [Electronic Return Activity \(PRS\)](#)
- [View Periodical Transactions](#)
- [BRM Invoice Detail Report](#)
- [View Historical Permit Transactions](#)
- [eDocs Preparation / Entry Warnings Report](#)
- [Carbon Accounting Statement](#)
- [Tech Credit Report](#)

### Full Service

- [Data Distribution/Informed Visibility Dashboard](#)
- [Push Subscription Profile](#)
- [Full Service Seamless Invoice Reports](#)
- [Full Service Seamless Acceptance Failure Jobs](#)

**Manage Mailing Activity**

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)

**Search For Business Location**

Location

All Business Locations ▼

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)
**Tech Credit Activity**

CRID	Company Name	Address Line 1	Address Line 2	City	State/Province	ZIP+4/Postal Code	Country	Qualifying Automation Volume	Initial Tech Credit balance	Remaining Tech Credit balance	Link to Postage Statement(s) where Tech Credit was applied
94543557	TITLE	555 credit boulevard		techie	CA	90210	UNITED STATES	0	200000.00	198963.72	<a href="#">PS#65428948</a> . <a href="#">PS#65431036</a> . <a href="#">PS#65431041</a> . <a href="#">PS#65447308</a> . <a href="#">PS#65455165</a> . <a href="#">PS#65455167</a> . <a href="#">PS#65484100</a> . <a href="#">PS#65485763</a> . <a href="#">PS#65509268</a> . <a href="#">PS#65744967</a> . <a href="#">PS#65809583</a> . <a href="#">PS#65809592</a> . <a href="#">PS#65809593</a> . <a href="#">PS#65810538</a> . <a href="#">PS#65812716</a> . <a href="#">PS#65812717</a> . <a href="#">PS#65818431</a> . <a href="#">PS#65818438</a> . <a href="#">PS#65818871</a> . <a href="#">PS#65818892</a> . <a href="#">PS#65818893</a> .

[PS#66079900](#) , [PS#66079901](#)

- When *PostaOne!* determines that a Tech Credit can be applied to a postage statement, it will do so after all other discounts and incentive have been applied
- Sample Tech Credit statement (PS 3602)

<b>BPM Flats Subtotal(Add lines A1-A54)</b>	<b>\$ 7,755.8000</b>
<b>BPM Flats Total (Line A55 minus A56)</b>	<b>\$ 7,755.8000</b>
<b>Part A Total(Line A57 or A91)</b>	<b>\$ 7,755.8000</b>
<b>Tech Credit</b>	<b>\$ 2,000.0000</b>
<b>Total Postage From All Parts</b>	<b>\$ 5,755.60</b>

- *PostaOne!* will apply the Tech Credit balance to qualified statements in-full
- A partial Tech Credit amount will be applied to statements if the Tech Credit amount is greater than the total postage for the postage statement
- The remaining Tech Credit amount for each CRID will be applied to subsequent statement(s)

- **Goal:** Create passive process for entering *PostalOne!* Helpdesk issues in CustomerFirst! / eService
- **What:** Create single source access and tracking for customer of all service issues and Helpdesk issues using CustomerFirst! / eService.
- **Status:** Completed and ready for Proof of Concept test to begin.
  - Ready for training and roll out with test customers and Helpdesk team.
  - Application work and CAT Testing Complete.
- **How:**
  - Customer will enter *PostalOne!* Helpdesk issue/ticket information in eService
  - Issue/Ticket will be routed by CF! to Helpdesk staff at NCSC
  - NCSC staff will take issue and enter in Remedy for resolution
  - NCSC will update issue/ticket status through out the process
  - Once resolved, NCSC will input resolution information for issue/ticket back into CF! for customer review
  - If the resolution is satisfactory to customer, issue/ticket will be closed

- **USPS was using two different processes to identify By/For**
- **Postage Statement**
  - **Identification of Mailing Agent (MA):**
    - System used a permit assigned to the Mailing Agent.
    - Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
    - Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest
  - **Identification of Mail Owner (MO):**
    - System used a permit assigned to the Mail Owner.
    - Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
    - Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **Full Service Information**

- **Identification of Mailing Agent (MA):**

- Mail.dat - System used a MID or CRID from Mail Preparer field in .mpa
    - Mail.XML –
      - QualificationReportDetailCreateRequest MID/CRID;
      - QualificationReportSummaryCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Identification of Mail Owner (MO):**

- Mail.dat - System used MID, CRID from Mail Owner field in the .cpt, .mpa, .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
    - Mail.XML – MailpieceCreate MID/CRID;  
QualificationReportDetailCreateRequest MailOwnerCRID;  
MailpieceCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Inconsistencies in processes caused confusion and data issue**

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

<b>Mailer</b>	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent <i>(If other than permit holder)</i>	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared <i>(If other than permit holder)</i>
	CAPS Cust. Ref. No. _____ CRID _____		CRID _____		CRID _____

**No changes**

- **Permit Holder**
  - **Postal Wizard** → Permit selected under Account Holder
  - **Mail.dat** → .mpa Permit Number
  - **Mail.XML** → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent <i>(If other than permit holder)</i>	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared <i>(If other than permit holder)</i>
	CAPS CRID		CRID		CRID

April Change →

- **Prior:**

- System used a permit assigned to the Mailing Agent.
- Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
- Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest

- **April:**

- Postal Wizard → Permit/CRID selected under Account Holder
- Mail.dat → System no longer derives MA permit
  - .mpa Mailer ID of Preparer
  - .mpa CRID of Preparer
- Mail.XML → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent (If other than permit holder)	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared (If other than permit holder)
	CAPS Cust. Ref. No. _____	<b>October Change →</b>			
	CRID _____				CRID _____

- **Prior:**

- System used a permit assigned to the Mail Owner.
- Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **October:**

- Postal Wizard → Permit/CRID selected under Account Holder
- **Mail.dat**
  - .cpt Mailer ID of Mail Owner,
  - .mpa Mailer ID of Mail Owner,
  - .cpt CRID of Mail Owner,
  - .mpa CRID of Mail Owner,
  - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **Infrastructure Upgrades (May, June, Sept.)**
- **Full Service issues/gaps fixes in July and October 2013**
- **Working these through *PostalOne!* Usergroup 1**
- **Examples:**
  - First-Class Bundle Based Flats
  - Full Support of Logical Containers for all Classes
  - Support for Copal in Third Party Logical Environments
  - Postal Wizard support for Periodicals and Bound Printed Matter
  - Non-Uniqueness Exception for Mail.dat, Mail.xml < 10,000
  - Air-boxes
  - Full Service eDoc validations – corrections and enhancements
  - Full-Service Feedback & Data Distribution corrections
  - BPM Parcel Conversion from Mail.dat to Shipping Services

<b>Release Schedule: 2014</b>			
<b>Release Activities &amp; Milestones</b>	<b>January 2014</b>	<b>July 2014</b>	<b>October 2014</b>
	Price & Structural Changes	Price & Structural Changes	Non-Structural Changes
<b>USPS Announcement of Major Business Changes &amp; Requirements</b>			
Publish Release Overview	Jun 28 2013	Jan 3 2014	Feb 7 2014
<b>IDEAlliance Technical Specifications</b>			
Publish initial technical specifications	Jun 27 2013	Dec 31 2013	-
Publish final technical specifications	Jul 22 2013	Jan 27 2014	-
<b>USPS Postage Statements Publication Schedule</b>			
Publish Preliminary Postage Statements minus actual prices	Oct 4 2013	April 7 2014	-
Publish Final Price Embedded Postage Statements	Dec 20 2013	Jun 27 2014	-
<b>USPS Release Documents (Release Notes, Guides and Technical Specifications)</b>			
Publish Initial Version of Release Documents	July 12 2013	Jan 17 2014	Feb 21 2014
Publish Second Version of Release Documents	Aug 23 2013	Feb 28 2014	May 30 2014**
Publish Third Version of Release Documents	Nov 22 2013	Jun 6 2014	Sep 12 2014
Publish fourth version of release documents (release notes only)	Jan 10 2014	Jul 11 2014	Oct 24 2014
Publish Final (Post-Deployment) Release Documents	Feb 14 2014	Aug 15 2014	Nov 21 2014**
<b>Acceptance Testing</b>			
Execute Acceptance Testing	Nov 25 2013 - Jan 3 2014**	Jun 9 2014 - Jul 3 2014	Sep 15 2014 - Oct 17 2014
<b>USPS Release Deployment</b>			
TEM Software Deployment	Dec 16 2013 - Jan 3 2014	Mar 17 2014 - Jul 3 2014**	Sep 29 2014 - Oct 17 2014
Deployment	Jan 12 2014	Jul 13 2014	Oct 26 2014
Price Change Effective	Jan 26 2014	Jul 27 2014	N/A

- **Mailings will be accepted with as little impact as possible**
- **In the event of *PostalOne!* outage:**
  - Mailers can submit hard copy postage statements, or
  - In lieu of a postage statement, they can submit the Customer Log of Mailings. The Log must minimally contain the following information:
    - Permit Holder
    - Permit Number
    - Total Pieces
    - Total Postage
    - Mailer Job ID
  - Upon restoration, process electronic documentation first; any remainder gets hard copy postage statements

- **Three phased approach to upgrade SASP infrastructure for the 2014 Full-Service Mandate**

## Phase 1 (May 2013)

Upgrade Hardware

**May 4 – May 6 2013**

- Migrate SASP Database from Mainframe to the new x86 Platform

**EXTENDED OUTAGE**

## Phase 2 (Jun - Aug 2013)

Prepare for FS Mandate

**June 2013**

- Upgrade Storage for high performance and high capacity

**August 2013**

- Implement Advanced Data Compression for more efficient use of storage and hardware resources

**MINIMAL OUTAGE**

## Phase 3 (Sep 2013)

Enable  
Readiness for FS Mandate

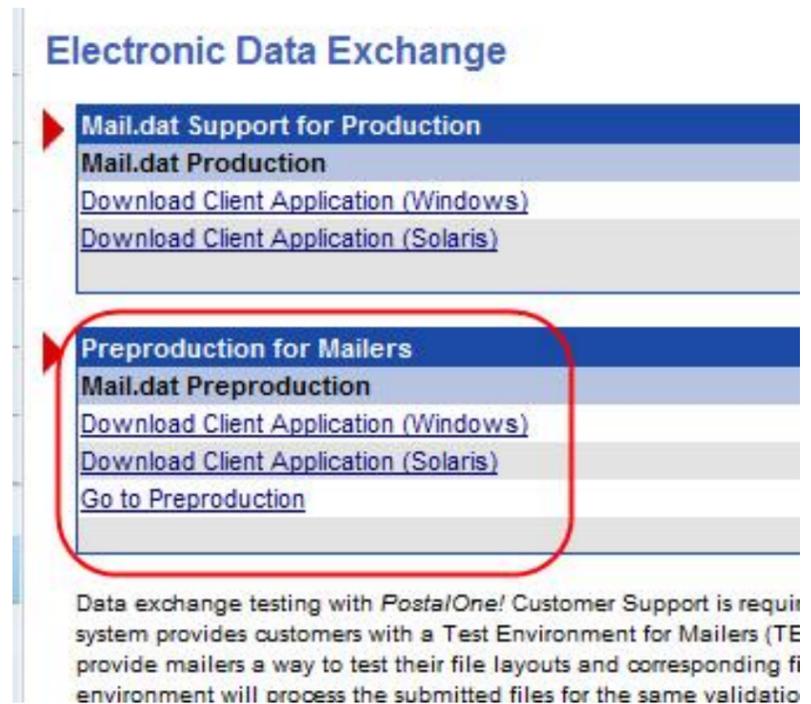
**September 2013**

- Upgrade & expand database servers to support end state data processing and surge capacity
- Enhance application to support end state data processing capacity
- Complete migration of remaining Mainframe components to the new x86 platform

**MINIMAL OUTAGE**

- **Preproduction Environment Implemented in March 2013**
  - New 'production-like' environment for mailers to test. The environment better simulates the production system vs the customer acceptance test (CAT) environment.
- **Preproduction Data Setup issues during April Release:**
  - Postage Statement Processing
    - Mapping Errors for Standard - **CORRECTED**
    - First Class Postage Statements - **CORRECTED**
    - Preparer Permit not linked to User - **CORRECTED**
  - Mail.dat/Mail.xml Validations
    - Log entry string too long on XML Message - **CORRECTED**
    - Unable to create additional entry office for PE - **SCHEDULED JULY 2013**

- **Who can use Preprod?**
  - Any active *PostalOne!* external user with Production access. Simply login to the Production Business Customer Gateway, navigate to the Electronic Data Exchange page, and access the “Preproduction for Mailers” links.
- **What can be tested in Preprod?**
  - New release code is available in both CAT and Preprod 4-6 weeks prior to Production deployment
    - Preprod has a separate Mail.dat client from CAT
    - Preprod has separate Mail.xml WSDLs from CAT
- **Why test in Preprod?**
  - Production jobs can be submitted – without having to update the mailings or request CRIDs/permits be set up – as the environment has production reference data for CRIDs, Permits, MIDs, etc.



**Electronic Data Exchange**

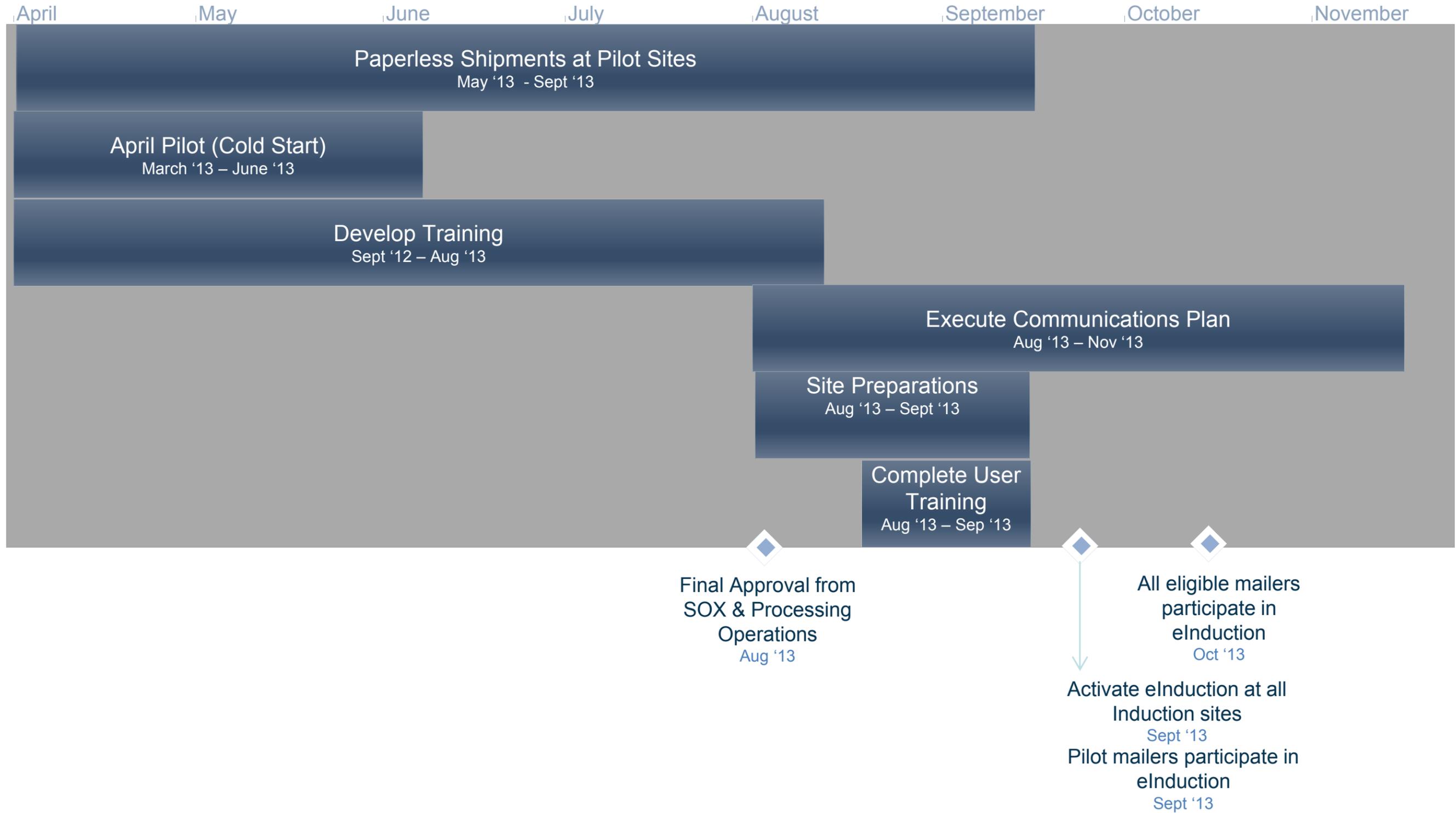
- ▶ **Mail.dat Support for Production**
  - Mail.dat Production**
  - [Download Client Application \(Windows\)](#)
  - [Download Client Application \(Solaris\)](#)
- ▶ **Preproduction for Mailers**
  - Mail.dat Preproduction**
  - [Download Client Application \(Windows\)](#)
  - [Download Client Application \(Solaris\)](#)
  - [Go to Preproduction](#)

Data exchange testing with *PostalOne!* Customer Support is required. The Test Environment for Mailers (TE) provides customers with a Test Environment for Mailers (TE) to provide mailers a way to test their file layouts and corresponding file environments. The Test Environment will process the submitted files for the same validation.

- **When can testing be conducted in Preprod?**
  - The deployment schedule for Preprod is the same as CAT – daily deployments during each CAT phase. There are notifications sent to all CAT users for both CAT and Preprod deployments – including whether a new Mail.dat client is required.
  - CRID and Permit reference data is refreshed from Production on a daily basis
- **How should Preprod issues be reported?**
  - During an active CAT cycle, issues should be reported to the CAT team following the normal process – email address: [PO\\_CAT@usps.gov](mailto:PO_CAT@usps.gov). Issues and questions can also be raised during the CAT Mailer calls.
  - During other times (when there is not CAT testing) the code in Preprod will be the same as the code in Production and TEM, so Production testing should be completed in TEM and should follow the standard Help Desk process.



- **Upcoming enhancements to Preprod**
  - Testing for Incentives – dependent on set-up of Program Registration application in the Preprod environment, current in progress
  - Reference data for Periodicals
    - A one-time load will be completed for July CAT testing phase
    - This reference data will be added to the regular sync process for the October CAT testing phase
  - Enhance the Electronic Data Exchange section in the BCG for ease of use and to provide updated definitions of Pre-Prod, CAT, Production



- **In Parallel Testing**
- **Validating Software/Systems/Verification Results**
  - Netflix
  - PB Presort Service, Quad/Graphics, IWCO, NCP Solutions
  - CSG, Arandell

Mail Error Type	Level			Source		
	Container	HU	Piece	eDoc	MPE	Sampling
Undocumented			X		Yes	Yes
Delivery Point			X	Yes		
Mail Characteristic	X	X	X			Yes
Move Update			X		Yes	
Nesting/Sortation	X	X	X	Yes	Yes	Yes
Postage			X			Yes
Weight			X			Yes
Scan Rate			X		Yes	Yes

- **Mail Anywhere/Pay Anywhere**

- Demonstrate Full-Service compliance:

Provide OCI file for copal	Accurate By/For information (MID, CRID)
Valid MID in barcodes	Valid entry facility
Barcode uniqueness	Valid STID in barcodes

- Measured for a Month, Help Desk Activation

- **Permit Fee Retirement**

- Automatic Process – If 90% of mailpieces on every postage statement is Full Service
- Evaluating revising criteria to cumulative

# MTAC Focus Group Sessions

## Periodicals

May 2013

- **Air Box Proposal Implementation**
- **Tech Credit Update**
- **January 2014 Full-Service Requirement Discussion**
- **Streamlining 3510/3526 Work Group Startup Update**
- **WG 151 – Streamlined Weight and Ad Percentage Capture Process Update**
- **Additional Entry Process Update**
- **By/For Precedence for Postage Statement Generation**
- **eInduction and Seamless Acceptance Update**
- ***PostalOne!/SASP***
  - **Gaps in Full-Service**
  - **FY14 Structured Release Cycle**
  - **Contingency Plan**
  - **Infrastructure – SASP Update, Pre-Prod**

- **Preparation**

- The Mailers are only allowed to put these flat bundles on a pallet
  - Physical Sack preparation is not allowed
- Allowable Pallet Presort Levels:
  - Merged 5-Digit Scheme, 5- Digit Scheme Carrier Routes, Merged 5-Digit, 5-Digit, 3-Digit
  - SCF through Mixed ADC
  - Origin Mixed ADC
- Container Type = AB in eDOC

- **Acceptance and Verification**

- Full Service and eInduction will support preparation, postage, appointment and induction functionality for AIR BOXES
- The *PostalOne!* system will accept and process Air Boxes as sacks or pallets for postage processing depending on weight restrictions.
  - Air Boxes weighing less than or equal to 70 lbs will be processed and charged as sacks
  - Air Boxes weighing over 70 lbs but less than or equal to 200 lbs will be processed and charged as pallets.
- The *PostalOne!* system will require mailers to specify the weight of sibling containers in Mail.dat and Mail.XML messages for Air Boxes so that the system can correctly process postage for the sibling containers as sacks or pallets depending on weight restrictions.

- **Induction**

- FAST system, through Mail.XML and online website, will allow identification of Air Boxes as a valid pallet type for downstream dock unload, and mail processing planning
  - Mail.dat transportation updates will support Air boxes
- Each Air box will have a single IMcb pallet label
- Surface Visibility system will scan the air boxes for eInduction and Full Service support

- **Reporting**

- Qualification reports will display an Air Box container as a sack when it weighs less than or equal to 70 lbs. The Air Box container type will be displayed as a pallet when it weighs over 70 lbs and less than or equal to 200 lbs. Qual reports will also display sibling Air Boxes as sacks or pallets depending on their categorization in mailer submitted eDocs.
- The eInduction reports will be updated to display Air Boxes as valid container types. The following three reports will be updated:
  - Job Summary Report
  - Shipping Summary Report
  - Container Detail Report

- **SPM (Service Performance Measurement) and Full-Service / Seamless Acceptance processing**

- The SASP system will accept and process Air Boxes and sibling containers as valid container types.

- **Planned for October 2013**

- **List Updates: Feb – May**
- **Final List Validation: May 20, 2013**
- **Final Customer letter notification: May 24, 2013**
- **Redemption Period (Subject to PRC approval):  
June 1, 2013 – May 31, 2014**

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

### Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



PostalOne!® Dashboard

### Your Account Settings

Welcome SUE

---

**Profile**

- Profile
- Request Access
- Request Status

---

**User Management**

- Request Inbox
- Manage User Access

### Account Service

- [Balance & Fees \(PostalOne!\)](#)
- [Manage Permits \(PostalOne!\)](#)
- [Incentive Programs](#)
- [Verification Assessment Evaluator \(PostalOne!\)](#)

### Design & Prepare

- [Automated Business Reply Mail](#)
- [Intelligent Mail Services](#)
- [Mailer ID](#)


HOME | HELP | CUSTOMER CARE | SIGN OUT

---

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Mailing Reports

## Mailing Reports

- [View Transactions](#)
- [Mailing Summary Report](#)
- [Pending Postage Statements](#)
- [Mail Quality Reports](#)
- [Statement of Ownership](#)
- [Issue Level Postage Statement](#)
- [Induction Activity Report \(eInduction\)](#)
- [Publication Report](#)
- [Electronic Return Activity \(PRS\)](#)
- [View Periodical Transactions](#)
- [BRM Invoice Detail Report](#)
- [View Historical Permit Transactions](#)
- [eDocs Preparation / Entry Warnings Report](#)
- [Carbon Accounting Statement](#)
- [Tech Credit Report](#)

### Full Service

- [Data Distribution/Informed Visibility Dashboard](#)
- [Push Subscription Profile](#)
- [Full Service Seamless Invoice Reports](#)
- [Full Service Seamless Acceptance Failure Jobs](#)

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)

Search For Business Location

Location

All Business Locations ▼

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)

### Tech Credit Activity

CRID	Company Name	Address Line 1	Address Line 2	City	State/Province	ZIP+4/Postal Code	Country	Qualifying Automation Volume	Initial Tech Credit balance	Remaining Tech Credit balance	Link to Postage Statement(s) where Tech Credit was applied
94543557	TITLE	555 credit boulevard		techie	CA	90210	UNITED STATES	0	200000.00	198963.72	<a href="#">PS#65428948</a> . <a href="#">PS#65431036</a> . <a href="#">PS#65431041</a> . <a href="#">PS#65447308</a> . <a href="#">PS#65455165</a> . <a href="#">PS#65455167</a> . <a href="#">PS#65484100</a> . <a href="#">PS#65485763</a> . <a href="#">PS#65509268</a> . <a href="#">PS#65744967</a> . <a href="#">PS#65809583</a> . <a href="#">PS#65809592</a> . <a href="#">PS#65809593</a> . <a href="#">PS#65810538</a> . <a href="#">PS#65812716</a> . <a href="#">PS#65812717</a> . <a href="#">PS#65818431</a> . <a href="#">PS#65818438</a> . <a href="#">PS#65818871</a> . <a href="#">PS#65818892</a> . <a href="#">PS#65818893</a> .

[PS#66079900](#) , [PS#66079901](#)

- When *PostalOne!* determines that a Tech Credit can be applied to a postage statement, it will do so after all other discounts and incentive have been applied
- Sample Tech Credit statement (PS 3602)

<b>BPM Flats Subtotal(Add lines A1-A54)</b>	<b>\$ 7,755.8000</b>
<b>BPM Flats Total (Line A55 minus A56)</b>	<b>\$ 7,755.8000</b>
<b>Part A Total(Line A57 or A91)</b>	<b>\$ 7,755.8000</b>
<b>Tech Credit</b>	<b>\$ 2,000.0000</b>
<b>Total Postage From All Parts</b>	<b>\$ 5,755.60</b>

- *PostalOne!* will apply the Tech Credit balance to qualified statements in-full
- A partial Tech Credit amount will be applied to statements if the Tech Credit amount is greater than the total postage for the postage statement
- The remaining Tech Credit amount for each CRID will be applied to subsequent statement(s)

- Intelligent Mail Barcode

- Electronic Documentation

- Barcode Uniqueness
  - Exception: < 10,000
- Valid MIDs & CRIDs
- Valid Service Type in Barcode
- By/For Information
  - Exception: < 5000 Pieces
- Valid Entry Facility
- Co-Palletization Information
- FAST Appointments

- **Existing Mail Verifications – presort, content, barcode quality etc**
  - Mailings Falls Below Thresholds
    - Returned for Re-work or additional postage at applicable rate
- **Existing Full-Service Verifications**
  - Documentation not submitted electronically
  - Barcodes and Placards
  - Mailing Falls Below Thresholds
    - Returned for Re-work, or additional postage at applicable non-auto rate
- **eDoc Verifications**
  - Service Type Code, Mailer ID, Barcode Uniqueness, By/For, Entry Facility, CoPal

- **Work Group Title:**

  - Streamline Capture and Processing of Information on PS Forms 3526 and 3510.

- **Expected Date of Completion:**

  - August 2013

- **Work Group Issue Statement:**

  - This WG is proposed to develop an approach to streamline and simplify the capture, reporting and processing of key data elements in the PS Forms 3526 (Statement of Ownership, Management and Circulation) and PS Form 3510 (Application for Reentry or Special Price) for Periodicals.

- **Impact on Other Issues/Procedures:**

  - Forms
  - Pricing and Classification Center (PCSC)
  - Mail Service Providers & Mail Owners
  - USPS mail acceptance/verification

- **Desired Results:**

- Review and validate needs for the data contained in Forms 3526 and 3510.
- Review capabilities in *PostalOne!* such as Account Management to leverage these in the streamlining effort.
- Leverage *PostalOne!* publication history data to populate the relevant fields in the 3526.
- Recommend a simplified electronic approach to capture and process key elements in PS form 3526, 3526R and 3526X.
- Recommend a simplified electronic approach to capture and process key elements in PS Form 3510 and 3510M, including an option to complete and submit the form on-line.
- Determine feasibility of eliminating the need to pay 3510 fees via a physical check by paying electronically through CAPS.

- **Area of Focus:** Payment and Acceptance

- **Recommended Sponsors:** USPS: Pritha Mehra  
Industry: John Stark

- **Recommended WG Leaders:** USPS: John Garland  
Industry: Steve Smith

- **Task Team Issue Statement:**

This Task Team is proposed to develop an approach to simplify the capture and reporting of weight for all mail classes and ad percentages for Periodicals.

- **Desired Results:**

- Recommend a simplified approach to capture weight
- Develop simplified approach to capture ad percentage
- Reduce reliance on BME clerks to capture and validate weight
- Develop processes/approaches that are aligned with the Full-Service, Seamless Acceptance vision

- **Target Completion Date**

- August 31, 2013

- **Establish “Tolerance” Threshold for Seamless Acceptance Weight Verification**
  - Perform case study of Environmental Impact on Piece Weight
    - Develop scenarios specific to weight capture at production and at USPS entry facility
    - Record weight at production with starting points geographically spread out
    - Identify destinations that best demonstrate environmental zones
  - Tolerance Study
    - Review Periodicals and Standard data and current verification results from Seamless pilot mailers over 90-day period
- **Ad Percentage**
  - Consensus that current practices adopted by mail owners and MSPs are effective
- **BMEU/DMU vs. MSP/Mail Owner Facility Process Flow**
  - Observe and document best practices for future in-house weight verifications

- **On April 21, 2013, the eDoc Periodicals Additional Entry process changed.**
- **At *PostalOne!* sites:** Publishers who submit their Periodical mailing information electronically via Mail.dat or Mail.XML are not required to submit a request for approval for additional entry prior to mailing an approved Periodicals publications at an additional entry mailing office. The *PostalOne!* system will automatically create and approve the additional entry for the Periodicals when the publisher submits the Mail.dat or Mail.XML files...
- **At non-*PostalOne!* sites:** There are no changes for Periodicals mailings presented at non-PostalOne! sites. Publishers wishing to present Periodicals for verification at additional mailing offices without access to PostalOne! will need to file PS Form 3510-M, Application for Additional Mailing Office for Periodicals publication, indicating mailings will be presented at these offices.
- **Process Overview of New System Validations:** An interface has been created between the Pricing and Classification Service Center (PCSC) Periodicals publication database and the *PostalOne!* system. This interface allows acceptance employees to search for an original entry publication by entering the Periodicals publication name and publication number to validate whether or not a publication is authorized at an origin office.

- **eDoc Submission Scenarios:**

The following four scenarios for eDoc submission will allow for the publications to be processed as Periodicals Additional Entry:

- **Scenario 1 – eDoc submission with *New Entry Office***

- Submission is successful and NEW entry office is created. The Post Office of Mailing finance number on the postage statement is that of the new entry office (tied to Permit ZIP+4) and the permit number is that of the NEW entry office (tied to Permit ZIP+4)). The new entry office is created and linked to the same CAPS account of Original Entry Office of Publication, and the PCSC Periodicals publication data base is updated.
- The Publication Number will continue to be validated, and without the National Account Number in MPA record, the Permit ZIP+4 must be that of the Permit and Post Office of Mailing finance number. If the Permit ZIP+4 does not map to a finance number then a new Entry Office will not be created and the submission will fail

eDoc File Field Name	Action
MPA	Payment Account Number <b>IS NOT</b> populated
MPA	USPS Publication Number
MPA	Permit ZIP+4 <b>IS</b> a new active entry office

- **Scenario 2 – eDoc submission with new entry office**
  - Submission is successful and NEW entry office is created. The Post Office of Mailing finance number on the postage statement is that of the verification facility (tied to Verification Facility ZIP+4) and the finance number is that of the NEW entry office (tied to Permit ZIP+4). The new entry office is created as tied to the same CAPS account of Original Entry Office of Publication and the PCSC Periodicals publication data base is updated.

eDoc File Field Name	Action
MPA	Payment Account Number <b>IS</b> populated
SEG	Verification Facility ZIP+4 <b>IS</b> populated
MPA	USPS Publication Number
MPA	Permit ZIP+4 <b>IS</b> a new active entry office

- **Scenario 3 – eDoc submission with current entry office**
  - Submission is successful and no entry office is created. Post Office of Mailing finance number on the postage statement is that of entry office (tied to Permit ZIP+4) and is that of entry office (tied to Permit ZIP+4).

eDoc File Field Name	Action
Mpa	Payment Account Number <b>IS NOT</b> populated
MPA	USPS Publication Number
MPA	Permit ZIP+4 <b>IS</b> a <i>current</i> active entry office

- **Scenario 4 – eDoc submission with original entry office (this is the expected data from the Mailer)**
  - Submission is successful. Post Office of Mailing finance number on the postage statement is that of the verification facility (tied to Verification Facility ZIP+4) and the Permit finance number is that of the original entry office (tied to Permit ZIP+4).

eDoc File Field Name	Action
MPA	Payment Account Number <b>IS</b> populated
SEG	Verification Facility ZIP+4 <b>IS</b> populated
MPA	USPS Publication Number
MPA	Permit ZIP+4 <b>IS</b> a <i>original</i> entry office

- **USPS was using two different processes to identify By/For**
- **Postage Statement**
  - **Identification of Mailing Agent (MA):**
    - System used a permit assigned to the Mailing Agent.
    - Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
    - Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest
  - **Identification of Mail Owner (MO):**
    - System used a permit assigned to the Mail Owner.
    - Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
    - Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **Full Service Information**

- **Identification of Mailing Agent (MA):**

- Mail.dat - System used a MID or CRID from Mail Preparer field in .mpa
    - Mail.XML –
      - QualificationReportDetailCreateRequest MID/CRID;
      - QualificationReportSummaryCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Identification of Mail Owner (MO):**

- Mail.dat - System used MID, CRID from Mail Owner field in the .cpt, .mpa, .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
    - Mail.XML – MailpieceCreate MID/CRID;  
QualificationReportDetailCreateRequest MailOwnerCRID;  
MailpieceCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Inconsistencies in processes caused confusion and data issue**

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

<b>Mailer</b>	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent (If other than permit holder)	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared (If other than permit holder)
	CAPS Cust. Ref. No. _____				
	CRID _____		CRID _____		CRID _____

**No changes**

- **Permit Holder**
  - **Postal Wizard** → Permit selected under Account Holder
  - **Mail.dat** → .mpa Permit Number
  - **Mail.XML** → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent <i>(If other than permit holder)</i>	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared <i>(If other than permit holder)</i>
	CAPS CRID		CRID		CRID

April Change →

- **Prior:**

- System used a permit assigned to the Mailing Agent.
- Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
- Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest

- **April:**

- Postal Wizard → Permit/CRID selected under Account Holder
- Mail.dat → System no longer derives MA permit
  - .mpa Mailer ID of Preparer
  - .mpa CRID of Preparer
- Mail.XML → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent (If other than permit holder)	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared (If other than permit holder)
	CAPS Cust. Ref. No. _____	<b>October Change →</b>			
	CRID _____				

- **Prior:**

- System used a permit assigned to the Mail Owner.
- Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **October:**

- Postal Wizard → Permit/CRID selected under Account Holder
- **Mail.dat**
  - .cpt Mailer ID of Mail Owner,
  - .mpa Mailer ID of Mail Owner,
  - .cpt CRID of Mail Owner,
  - .mpa CRID of Mail Owner,
  - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **Infrastructure Upgrades (May, June, Sept.)**
- **Full Service issues/gaps fixes in July and October 2013**
- **Working these through *PostalOne!* Usergroup 1**
- **Examples:**
  - First-Class Bundle Based Flats
  - Full Support of Logical Containers for all Classes
  - Support for Copal in Third Party Logical Environments
  - Postal Wizard support for Periodicals and Bound Printed Matter
  - Non-Uniqueness Exception for Mail.dat, Mail.xml < 10,000
  - Air-boxes
  - Full Service eDoc validations – corrections and enhancements
  - Full-Service Feedback & Data Distribution corrections
  - BPM Parcel Conversion from Mail.dat to Shipping Services

<b>Release Schedule: 2014</b>			
<b>Release Activities &amp; Milestones</b>	<b>January 2014</b>	<b>July 2014</b>	<b>October 2014</b>
	Price & Structural Changes	Price & Structural Changes	Non-Structural Changes
<b>USPS Announcement of Major Business Changes &amp; Requirements</b>			
Publish Release Overview	Jun 28 2013	Jan 3 2014	Feb 7 2014
<b>IDEAlliance Technical Specifications</b>			
Publish initial technical specifications	Jun 27 2013	Dec 31 2013	-
Publish final technical specifications	Jul 22 2013	Jan 27 2014	-
<b>USPS Postage Statements Publication Schedule</b>			
Publish Preliminary Postage Statements minus actual prices	Oct 4 2013	April 7 2014	-
Publish Final Price Embedded Postage Statements	Dec 20 2013	Jun 27 2014	-
<b>USPS Release Documents (Release Notes, Guides and Technical Specifications)</b>			
Publish Initial Version of Release Documents	July 12 2013	Jan 17 2014	Feb 21 2014
Publish Second Version of Release Documents	Aug 23 2013	Feb 28 2014	May 30 2014**
Publish Third Version of Release Documents	Nov 22 2013	Jun 6 2014	Sep 12 2014
Publish fourth version of release documents (release notes only)	Jan 10 2014	Jul 11 2014	Oct 24 2014
Publish Final (Post-Deployment) Release Documents	Feb 14 2014	Aug 15 2014	Nov 21 2014**
<b>Acceptance Testing</b>			
Execute Acceptance Testing	Nov 25 2013 - Jan 3 2014**	Jun 9 2014 - Jul 3 2014	Sep 15 2014 - Oct 17 2014
<b>USPS Release Deployment</b>			
TEM Software Deployment	Dec 16 2013 - Jan 3 2014	Mar 17 2014 - Jul 3 2014**	Sep 29 2014 - Oct 17 2014
Deployment	Jan 12 2014	Jul 13 2014	Oct 26 2014
Price Change Effective	Jan 26 2014	Jul 27 2014	N/A

- **Mailings will be accepted with as little impact as possible**
- **In the event of *PostalOne!* outage:**
  - Mailers can submit hard copy postage statements, or
  - In lieu of a postage statement, they can submit the Customer Log of Mailings. The Log must minimally contain the following information:
    - Permit Holder
    - Permit Number
    - Total Pieces
    - Total Postage
    - Mailer Job ID
  - Upon restoration, process electronic documentation first; any remainder gets hard copy postage statements

- **Three phased approach to upgrade SASP infrastructure for the 2014 Full-Service Mandate**

## Phase 1 (May 2013)

Upgrade Hardware

**May 4 – May 6 2013**

- Migrate SASP Database from Mainframe to the new x86 Platform

**EXTENDED OUTAGE**

## Phase 2 (Jun - Aug 2013)

Prepare for FS Mandate

**June 2013**

- Upgrade Storage for high performance and high capacity

**August 2013**

- Implement Advanced Data Compression for more efficient use of storage and hardware resources

**MINIMAL OUTAGE**

## Phase 3 (Sep 2013)

Enable  
Readiness for FS Mandate

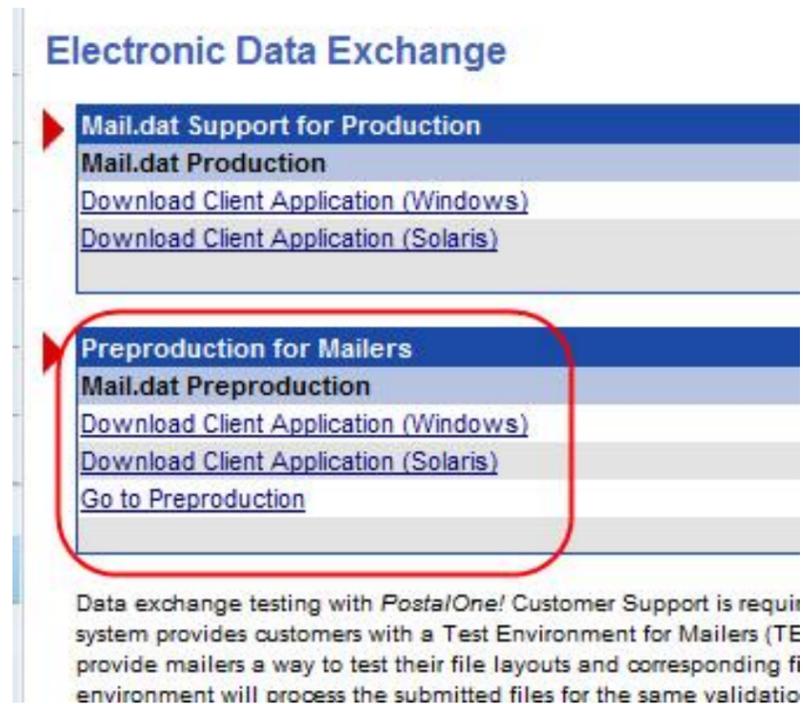
**September 2013**

- Upgrade & expand database servers to support end state data processing and surge capacity
- Enhance application to support end state data processing capacity
- Complete migration of remaining Mainframe components to the new x86 platform

**MINIMAL OUTAGE**

- **Preproduction Environment Implemented in March 2013**
  - New 'production-like' environment for mailers to test. The environment better simulates the production system vs the customer acceptance test (CAT) environment.
- **Preproduction Data Setup issues during April Release:**
  - Postage Statement Processing
    - Mapping Errors for Standard - **CORRECTED**
    - First Class Postage Statements - **CORRECTED**
    - Preparer Permit not linked to User - **CORRECTED**
  - Mail.dat/Mail.xml Validations
    - Log entry string too long on XML Message - **CORRECTED**
    - Unable to create additional entry office for PE - **SCHEDULED JULY 2013**

- **Who can use Preprod?**
  - Any active *PostalOne!* external user with Production access. Simply login to the Production Business Customer Gateway, navigate to the Electronic Data Exchange page, and access the “Preproduction for Mailers” links.
- **What can be tested in Preprod?**
  - New release code is available in both CAT and Preprod 4-6 weeks prior to Production deployment
    - Preprod has a separate Mail.dat client from CAT
    - Preprod has separate Mail.xml WSDLs from CAT
- **Why test in Preprod?**
  - Production jobs can be submitted – without having to update the mailings or request CRIDs/permits be set up – as the environment has production reference data for CRIDs, Permits, MIDs, etc.



**Electronic Data Exchange**

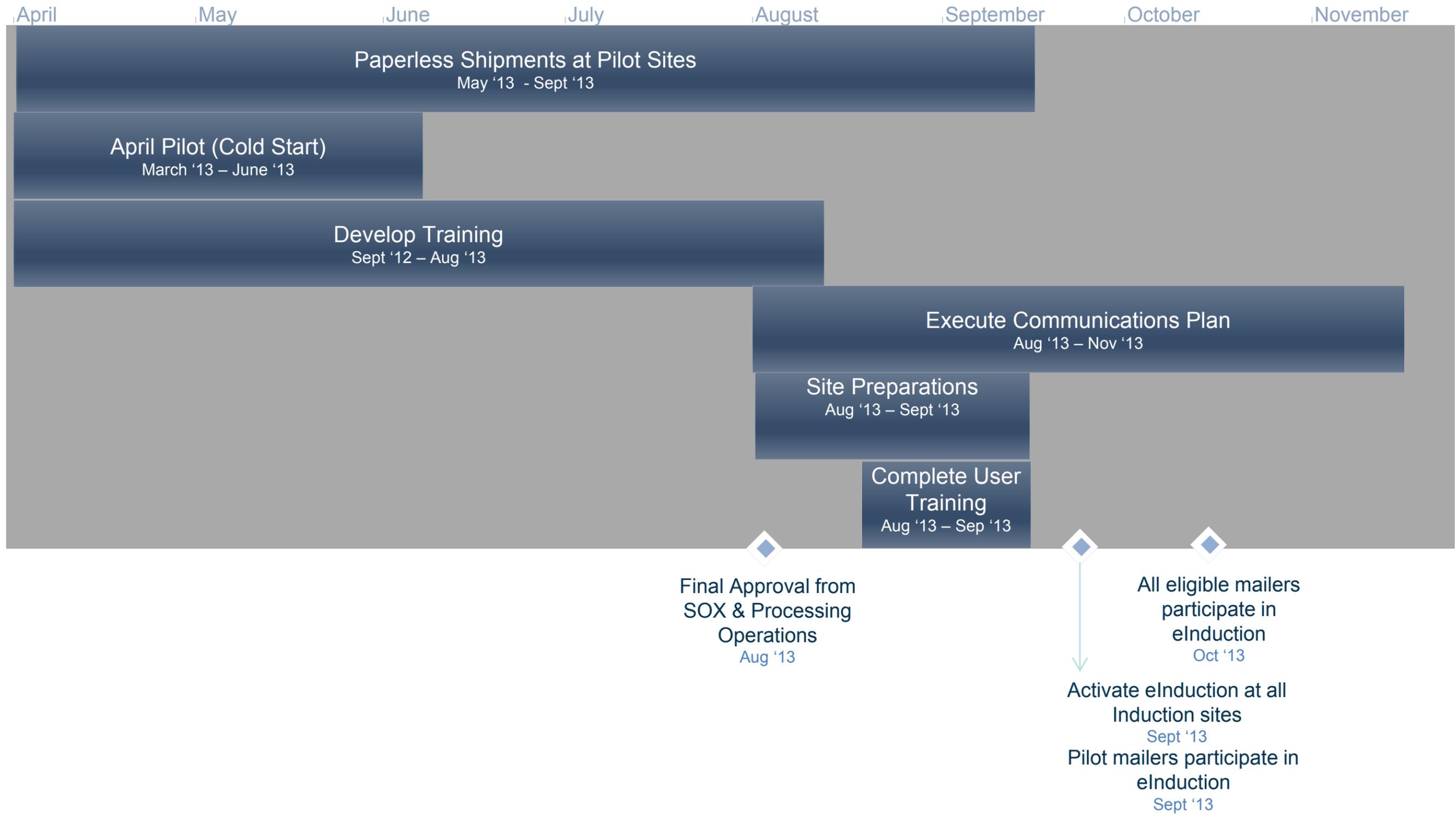
- ▶ **Mail.dat Support for Production**
  - Mail.dat Production**
  - [Download Client Application \(Windows\)](#)
  - [Download Client Application \(Solaris\)](#)
- ▶ **Preproduction for Mailers**
  - Mail.dat Preproduction**
  - [Download Client Application \(Windows\)](#)
  - [Download Client Application \(Solaris\)](#)
  - [Go to Preproduction](#)

Data exchange testing with *PostalOne!* Customer Support is required. The system provides customers with a Test Environment for Mailers (TE) which provides mailers a way to test their file layouts and corresponding file environment will process the submitted files for the same validation.

- **When can testing be conducted in Preprod?**
  - The deployment schedule for Preprod is the same as CAT – daily deployments during each CAT phase. There are notifications sent to all CAT users for both CAT and Preprod deployments – including whether a new Mail.dat client is required.
  - CRID and Permit reference data is refreshed from Production on a daily basis
- **How should Preprod issues be reported?**
  - During an active CAT cycle, issues should be reported to the CAT team following the normal process – email address: [PO\\_CAT@usps.gov](mailto:PO_CAT@usps.gov). Issues and questions can also be raised during the CAT Mailer calls.
  - During other times (when there is not CAT testing) the code in Preprod will be the same as the code in Production and TEM, so Production testing should be completed in TEM and should follow the standard Help Desk process.



- **Upcoming enhancements to Preprod**
  - Testing for Incentives – dependent on set-up of Program Registration application in the Preprod environment, current in progress
  - Reference data for Periodicals
    - A one-time load will be completed for July CAT testing phase
    - This reference data will be added to the regular sync process for the October CAT testing phase
  - Enhance the Electronic Data Exchange section in the BCG for ease of use and to provide updated definitions of Pre-Prod, CAT, Production



- **In Parallel Testing**
- **Validating Software/Systems/Verification Results**
  - Netflix
  - PB Presort Service, Quad/Graphics, IWCO, NCP Solutions
  - CSG, Arandell

Mail Error Type	Level			Source		
	Container	HU	Piece	eDoc	MPE	Sampling
Undocumented			X		Yes	Yes
Delivery Point			X	Yes		
Mail Characteristic	X	X	X			Yes
Move Update			X		Yes	
Nesting/Sortation	X	X	X	Yes	Yes	Yes
Postage			X			Yes
Weight			X			Yes
Scan Rate			X		Yes	Yes

# **MTAC Focus Group Sessions**

## **Standard Mail**

May 2013

- **FAST Appointment Requirements for Full-Service/Palletization Requirements**
- **Full-Service Requirements/Verification/Education Outreach/Onboarding**
- **Folded Self Mailer Education**
- **MDA Program Update**
- **MicroStrategy Reports – What’s New?**
- **Non-Profit Visibility/Identification in *PostalOne!***
- **By/For Precedence for Postage Statement Generation**
- **Tech Credit Update**
- **eInduction and Seamless Acceptance Update**
- **Mail Anywhere & Permit Fee Retirement Next Steps**
- ***PostalOne!*/SASP Update**
  - **Gaps in Full-Service**
  - **FY14 Structured Release Cycle**
  - **Contingency Plan**
  - **Infrastructure – SASP Update, Pre-Prod**

- **Mailers required to schedule appointments through FAST when entering mail at USPS facility**
  - Drop-ship mail; Mailer-transported, origin-entered mail verified at DMU/BMEU
  - Optional:
    - Associate content to appointment
    - Provide FAST appointment information in Full-Service eDoc
- **Three ways Mailers can create, update, cancel, manage appointments:**
  - Access FAST via Business Customer Gateway
  - Use Mail.XML to create and modify appointments and link content to appointments
  - Associate content to recurring appointment in Mail.dat

- **Automation Verification – Existing Verifications**
  - Mailpiece preparation including dimensions, shape, weight, and flexibility
  - Barcode quality
  - Content
  - Presort makeup
  - Automation eligibility
- **Existing Thresholds Apply**
- **Mailing Falls Below Thresholds**
  - Returned for Rework
  - Additional Postage at the applicable rates in January
  - Examples:
    - Poor Barcode quality = % of pieces at Non-Automation Rates
    - Poor Presort quality = % of pieces at FCM Single Piece Rates

- **Full-Service Acceptance - Existing Verifications**
  - Documentation not submitted electronically
  - Container placards are inside or covered by shrink-wrap
  - No Intelligent Mail container barcodes on the container placards
    - Initial Sample = 3 Container
    - If in error, select additional 3 containers
    - More than 2 total errors = Failure
  - No Intelligent Mail tray barcodes on the tray/sack labels
    - Initial Sample = 5 Handling Units
    - If one or more in error, select additional 3 Handling Units
    - More than 3 total errors = Failure
  - No Intelligent Mail tray barcode on the mailpieces
    - Initial Sample = 30 Mailpieces
    - 4 or more in error = Failure
  - Mailing Falls Below Thresholds
    - Returned for Re-work
    - Additional postage at the non-automated rates in January

- **Full-Service Electronic Verification - New Verifications**
  - Validation of the Information contained in eDoc
  - Data is aggregated over a one-month period
  - Displayed in the Mailer Scorecard by CRID
  - Develop reasonable thresholds
  
  - In the October release, *PostalOne!* will display the projected invoice from full-service electronic verification failures
    - Removal of full-service and automation rate
    - Only mailpieces with verification errors above the preliminary threshold

- **Service Type ID:**

A service type ID that is provided in the IMb and contained in the eDoc is appropriate for the class of mail and service level of the mailpiece.

- **Mailer ID:**

A mailer ID that is provided in the IMb, IMtb, and/or IMcb and contained in the eDoc is valid (registered with the USPS Mailer ID system).

- **Unique Container Barcode:**

An IMcb contained in the eDoc is unique across mailings for 45 days.

- **Unique Tray Barcode:**

An IMtb that contained in the eDoc is unique across mailings for 45 days.

Exception: Small mailings that have fewer than 10,000 pieces can use the same serial number for all trays in the mailing, if postage is affixed to each piece at the correct price, or the pieces are of identical weight and separated by price.

- **Unique Piece Barcode:**

An IMb contained in the eDoc is unique across mailings for 45 days.

Exception: Small mailings that have fewer than 10,000 pieces, where postage is affixed to each piece at the correct price or each piece is of identical weight and the mailpieces are separated by price, can use the same serial number for all pieces in the mailing. In this case, uniqueness is required for the serial number at the mailing level. A different serial number should be used for each mailing and the serial number cannot be repeated within 45 days.

- **Co-Palletization:**

Co-palletized mailings must have eDoc submitted by both the origin facility and the consolidator to describe the movement of trays and sacks.

- **Entry Facility:**

Entry facility provided in eDoc (Locale key or ZIP Code) is a valid USPS facility.

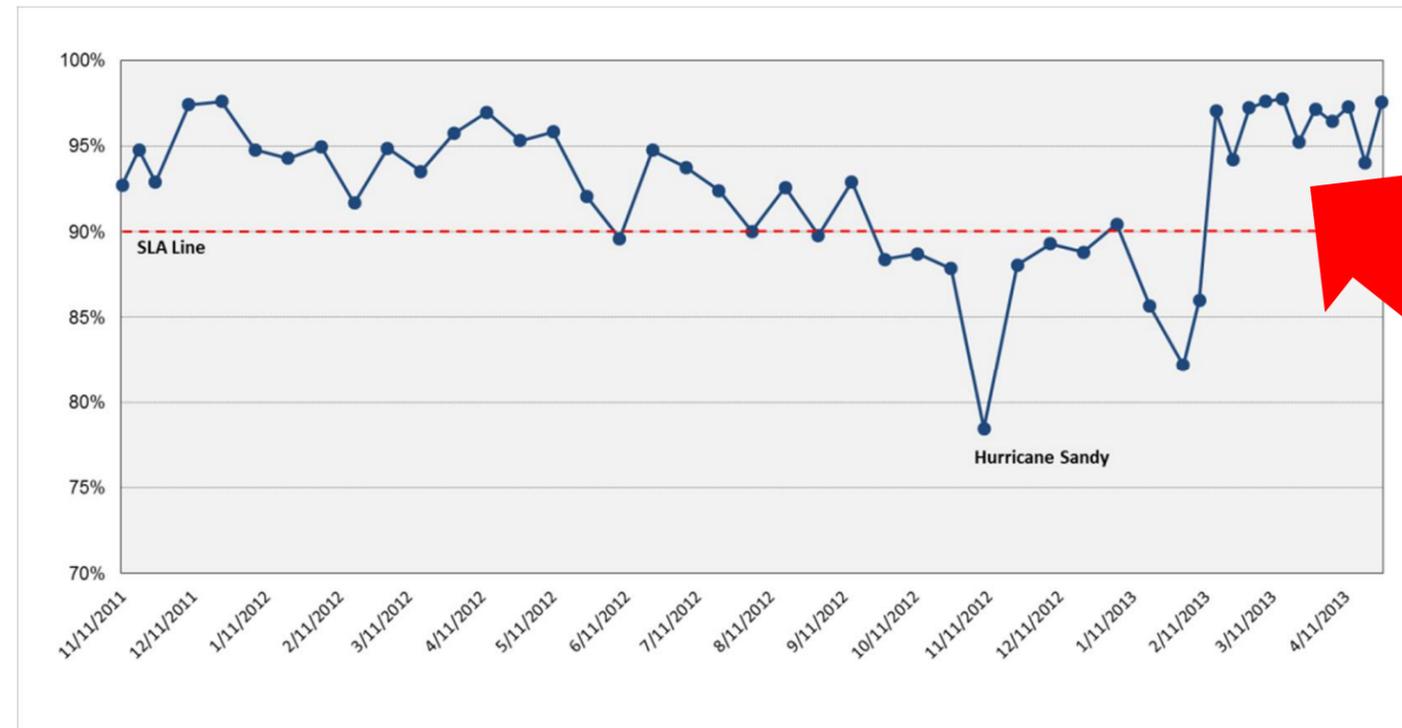
- **By/For:**

Electronic documentation is checked to ensure that the mail owner and mailing agent identification are accurately populated.

## Plan for Every Mailer

Outreach	Dates/Contact
<b>Federal Register Notices:</b> <ul style="list-style-type: none"> <li>Implementation of Full-Service Intelligent Mail for Automation Prices</li> </ul>	<ul style="list-style-type: none"> <li>Advance Notice: April 2012</li> <li>Proposed Rule: October 2012</li> <li>Final Rule: April 2013</li> </ul>
<b>Letters to Permit Holders</b>	<ul style="list-style-type: none"> <li>May, October, December</li> </ul>
<b>Local Outreach (BMEs)</b> <ul style="list-style-type: none"> <li>Local Educational Seminars</li> <li>Contacting Every Mailer</li> <li>Full Service Handouts</li> <li>Promote Vendor Solutions</li> </ul>	
<b>Communication &amp; Education</b> <ul style="list-style-type: none"> <li>DMM Advisory, PCCs</li> <li>Mailer Webinar Series</li> </ul>	<ul style="list-style-type: none"> <li>Getting Started with Full-Service</li> <li>Full-Service MIDs/CRIDs</li> <li>Business Customer Gateway</li> <li>Full-Service Feedback</li> <li>Full-Service eDoc and Testing</li> </ul>

- **Training developed in response to industry feedback for clarity on January 2013 changes**
  - Training developed with key Industry and USPS stakeholders
- **Internal**
  - Three modules deployed to LMS
    - Mod 1 – FSM Basics for the Host Piece
    - Mod 2 – FSM Additional Designs
    - Mod 3 - FAQs
  - Mods 1 & 2 have retention questions
  - Pushed to field May 20
    - MDAs
    - MBMEs
    - MSSs
    - Mailing Requirements
    - BMA
- **External**
  - Leveraging Mods 1 & 2 from Internal Training
  - POSTCOM Webinar – May 30
  - Three Mailer Webinars
    - May 28, June 4 & 6



**Significant improvements in MDA response time**  
**Last week over 97% of tickets closed on time**

- **Most Tickets are being resolved on the same day when the MDA has enough information to resolve**
- **Phone Tickets will be resolved in one business day provided MDA has all materials provided**
- **Mailers need to provide specific issues if they are not experiencing this level of service**

- **MDA's will provide written evaluation when requested**
- **All acceptance & verification procedures apply**
- **Applicable to national and local mailings**
- **Process:**
  - Request form will be completed by customer or MDA
  - MDA will provide written evaluation to customer upon request
  - Program description and FAQs will be published last week of May
- **Program Launch June 2013**

- **The Mailer Scorecard provides a dashboard view summarizing performance**
- **Allows comparison across facilities**
- **Conditional formatting provides a trending view across months**
- **Drill reports provide a way to determine specific mail preparation errors**
- **Available for any company that submits electronic documentation**
  - Data grouped by eDoc submitter CRID

## Mailer Scorecard

### FEBRUARY 2013

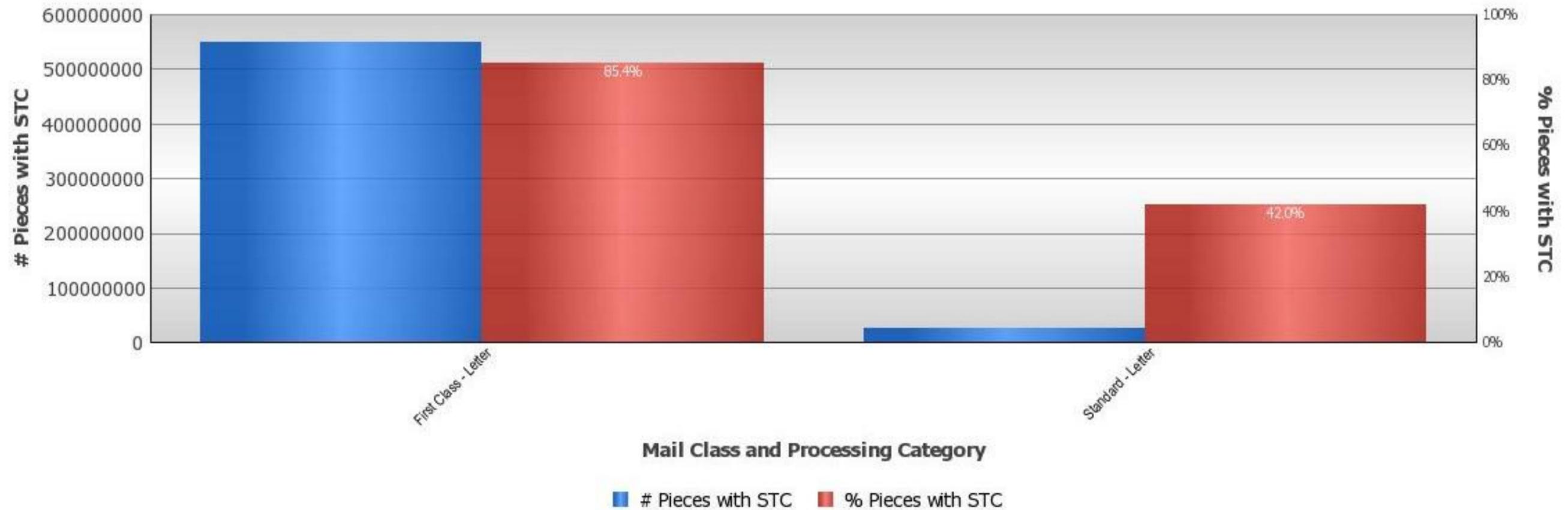
Full-Service Compliance	eInduction	Seamless	Manual Sampling	Entry Point Verification	Mailer Profile
<input type="radio"/> # Metrics	<input checked="" type="radio"/> % Metrics				
<b>Full-Service Compliance</b>					
<b>eDoc Submitter</b>	<u>20400555</u>	<u>123456</u>			
	<u>Chicago Presort Company</u>	<u>St. Louis Mailing Management Inc.</u>			
# Containers	157	12,427			
# Handling Units	3,461	182,875			
# Pieces	1,352,849	47,471,183			
% FS Mail Volume	100.00%	99.38%			
% OCI Not in Error	100.00%	91.33%			
% Container MID Not in Error	100.00%	100.00%			
% HU MID Not in Error	100.00%	100.00%			
% Piece MID Not in Error	100.00%	99.98%			
% STID Not in Error	100.00%	100.00%			
% By/For Not in Error	99.84%	83.55%			
% By/For Matching Not in Error	82.62%	77.69%			
% Container Barcode Uniqueness Not in Error	100.00%	100.00%			
% HU Barcode Uniqueness Not in Error	99.83%	100.00%			
% Piece Barcode Uniqueness Not in Error	10.07%	99.99%			
% Container Entry Facility Not in Error	100.00%	100.00%			
% Container CSA Not in Error	100.00%	100.00%			
% Early Scheduled Ship Date Not in Error	N/A	100.00%			

- **Mailer Scorecard**
  - New Mailer Profile View
    - Mail volume, mail class and processing category usage, eDoc submission methods
  - CRIDs ordered by business name
  - Additional fields on Seamless & eInduction tabs
  - Error counts updated to include only errors
  
- **Tooltips updated throughout all reports**

<b>Mailer Scorecard</b>		
		<b>FEBRUARY 2013</b>
		Full-Service Compliance    eInduction
Mailer Profile		
eDoc Submitter	<a href="#">20400555</a>	<a href="#">123456</a>
	<a href="#">Chicago Presort Company</a>	<a href="#">St. Louis Mailing Management Inc.</a>
# Pieces	494	33,699
# Full-Service Pieces	492	29,491
# Non-Full-Service Pieces	2	4,208
% First-Class - Letters & Cards	2.63%	69.56%
% First-Class - Flats	39.88%	6.87%
% First-Class - All Other Categories	0.81%	0.00%
% Standard - Letters & Cards	5.26%	0.59%
% Standard - Flats	0.00%	4.74%
% Standard - All Other Categories	0.00%	0.00%
% Periodicals - Flats	52.23%	0.55%
% Periodicals - All Other Categories	0.00%	17.32%
% All Other Classes - Letters	0.00%	0.00%
% All Other Classes - Flats	0.00%	0.36%
% All Other Classes - All Other Categories	0.00%	0.00%
% Mail.dat Jobs	100.00%	100.00%
% Mail.XML Jobs	0.00%	0.00%
% Postal Wizard Jobs	0.00%	0.00%
Total Discounts Received	\$0.00	\$0.00
Total Number of Full-Service Jobs	6	22
% Full-Service Jobs IMsb	0.00%	0.00%
% Full-Service Jobs SST	0.00%	0.00%

- **Start-the-Clock**
  - Mail Class and Processing Category

**Pieces Receiving STC by Mail Class and Processing Category**



Mail Class ▲	Processing Category ▲	# Containers ▼	# Containers with STC ▼	% Containers with STC ▼	# Handling Units ▼	# Handling Units with STC ▼	% Handling Units with STC ▼	# Pieces ▼	# Pieces with STC ▼	% Pieces with STC ▼
First Class	Letter	4,322,718	3,967,295	91.8%	251,836,650	227,406,969	90.3%	644,161,553	549,812,808	85.4%
Standard	Letter	225,436	88,102	39.1%	10,197,192	3,907,409	38.3%	60,678,944	25,466,167	42.0%

- **Nonprofit authorization is at a permit level today**
- **Requires a permit at each site where a customer mails**
- **Necessitates use of ghost permits to identify customers for nonprofit**

**Permit Information**

Finance Number: 51-7716

Permit Type: **PI**  Check to override automatic cancellation for non use.

Permit Number: 53

Current Balance: \$100,292.63

\* Account Status: ACTIVE

Cancellation Reason: [Empty]

Cancellation Date: [Calendar Icon]

Postage Payment Systems  
*Hold down the Ctrl key and select all that apply*

Alternate Mailing System  
Manifest Mailing System  
Optional Procedure

EDDM Retail:

---

**Applicant Information**

CRID: 4431362 *\*NOTE: Online users are associated to this permit.*

\* Company Name: AMERICAN

Account Number: 589465

Other Authorizations: Not Applicable

This is a Continuous Mailer:

---

Nonprofit Authorization		
Number	Date	Status
628370	11/01/1996	<a href="#">AUTHORIZED</a>

---

\* Country: UNITED STATES

\* Address Line 1: 352 CHURCH AVE SW

Address Line 2: [Empty]

\* City: ROANOKE

\* State: VIRGINIA

\* ZIP Code: 24016 - 5008

<b>Name:</b>	Nonprofit Company 01
<b>CRID:</b>	20515812
<b>Corporate:</b>	N
<b>Address:</b>	901 D St. SW
<b>City:</b>	Washington
<b>State/Province:</b>	DC
<b>ZIP/Postal Code:</b>	20024
<b>Country:</b>	UNITED STATES
<b>Last Updated:</b>	2013-05-07

- Location Attributes
- Associated Business Locations
- Users
- Permit Profile
- Contact Information

The Location Attributes tab is used to view and/or edit all attributes of a business location in PostalOne!. Please hover over an individual field for a brief description of its purpose.

\* Required

<b>Mail Facility ID: *</b>	20024-2130	
<b>Discounts and Rebates:</b>	<input type="checkbox"/>	
<b>ACS Fulfillment:</b>	<input checked="" type="checkbox"/> Enabled	
<b>Non-Profit Authorization:</b>	<input checked="" type="checkbox"/> Number: 813	Status: <b>Authorized</b>
<b>eVS Participant :</b>	<input type="checkbox"/>	
<b>PRS Participant:</b>	<input type="checkbox"/>	
<b>SBP Participant:</b>	<input type="checkbox"/>	
<b>Web Service Enabled:</b>	<input type="checkbox"/>	
<b>Incentive Mailer:</b>	<input type="checkbox"/>	
<b>Mail Service Provider:</b>	<input type="checkbox"/>	

- **For Mail.dat:**
  - The Rate Type field on the MPU file or the CPT file must be “N”
  - First, the permit holder’s nonprofit status is checked (based on the permit in the MPA).
  - If the PH does not have nonprofit status, we then use the mail owner’s local permit ref number from the MPA to check the mail owner non profit status.
  - If neither the PH or MO have approved and valid nonprofit status, the job is rejected.
- **For Mail.XML:**
  - The Rate Type field is on the PostageStatementCreateRequest message, and must be “N”
  - The PermitHolderData block and the MailOwnerData block are used to find the nonprofit status for each of those roles; if neither has nonprofit status, the message is rejected.

- **For Mail.dat:**

- The Rate Type field on the MPU file or the CPT file must be “N”
- Permit holder’s nonprofit status is checked (based on the permit in the MPA).
- **If the PH does not have nonprofit status, then use:**
  - .cpt Mailer ID of Mail Owner,
  - .mpa Mailer ID of Mail Owner,
  - .cpt CRID of Mail Owner,
  - .mpa CRID of Mail Owner,
  - .mpa Mail Owner Lcl Permit Ref Number / Int’l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int’l Bill Num

**to check the mail owner non profit status.**
- If neither the PH or MO have approved and valid nonprofit status, the job is rejected.

- **For Mail.XML:**

- The Rate Type field is on the PostageStatementCreateRequest message, and must be “N”
- The PermitHolderData block and the MailOwnerData block are used to find the nonprofit status for each of those roles; if neither has nonprofit status, the message is rejected.

- **USPS was using two different processes to identify By/For**
- **Postage Statement**
  - **Identification of Mailing Agent (MA):**
    - System used a permit assigned to the Mailing Agent.
    - Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
    - Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest
  - **Identification of Mail Owner (MO):**
    - System used a permit assigned to the Mail Owner.
    - Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
    - Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **Full Service Information**

- **Identification of Mailing Agent (MA):**

- Mail.dat - System used a MID or CRID from Mail Preparer field in .mpa
    - Mail.XML –
      - QualificationReportDetailCreateRequest MID/CRID;
      - QualificationReportSummaryCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Identification of Mail Owner (MO):**

- Mail.dat - System used MID, CRID from Mail Owner field in the .cpt, .mpa, .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
    - Mail.XML – MailpieceCreate MID/CRID;  
QualificationReportDetailCreateRequest MailOwnerCRID;  
MailpieceCreateRequest PermitNumber, PermitType, Permitip+4, PublicationNumber

- **Inconsistencies in processes caused confusion and data issue**

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

<b>Mailer</b>	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent ( <i>If other than permit holder</i> )	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared ( <i>If other than permit holder</i> )
	CAPS Cust. Ref. No. _____		CRID _____		CRID _____

**No changes**

- **Permit Holder**
  - **Postal Wizard** → Permit selected under Account Holder
  - **Mail.dat** → .mpa Permit Number
  - **Mail.XML** → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent <i>(If other than permit holder)</i>	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared <i>(If other than permit holder)</i>
	CAPS CRID		CRID		CRID

April Change →

- **Prior:**

- System used a permit assigned to the Mailing Agent.
- Mail.dat - selected permit based on the User ID sending eDoc > CRIDs linked to user > permits linked to CRIDs > permits in finance unit > lowest PI permit
- Mail.XML - permit info in the MailingAgentData in the PostageStatementCreateRequest

- **April:**

- Postal Wizard → Permit/CRID selected under Account Holder
- Mail.dat → System no longer derives MA permit
  - .mpa Mailer ID of Preparer
  - .mpa CRID of Preparer
- Mail.XML → PermitHolderData block in the CreatePostageStatement block in the PostageStatementCreateRequest message

United States Postal Service

## Postage Statement—Standard Mail

 Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

Mailer	Permit Holder's Name and Address and Email Address, if Any	Telephone	Name and Address of Mailing Agent (If other than permit holder)	Telephone	Name and Address of Individual or Organization for Which Mailing is Prepared (If other than permit holder)
	CAPS Cust. Ref. No. _____	<b>October Change →</b>			
	CRID _____				CRID _____

- **Prior:**

- System used a permit assigned to the Mail Owner.
- Mail.dat - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **October:**

- Postal Wizard → Permit/CRID selected under Account Holder
- **Mail.dat**
  - .cpt Mailer ID of Mail Owner,
  - .mpa Mailer ID of Mail Owner,
  - .cpt CRID of Mail Owner,
  - .mpa CRID of Mail Owner,
  - .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num & .mpa Mail Owner Lcl Permit Ref Number / Int'l Bill Num – Type
- Mail.XML – permit info in the MailingOwnerData in the PostageStatementCreateRequest

- **List Updates: Feb – May**
- **Final List Validation: May 20, 2013**
- **Final Customer letter notification: May 24, 2013**
- **Redemption Period (Subject to PRC approval):  
June 1, 2013 – May 31, 2014**

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

### Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



PostalOne!® Dashboard

### Your Account Settings

Welcome SUE

---

**Profile**

- Profile
- Request Access
- Request Status

---

**User Management**

- Request Inbox
- Manage User Access

### Account Service

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)
- Incentive Programs
- Verification Assessment Evaluator (PostalOne!)

### Design & Prepare

- Automated Business Reply Mail
- Intelligent Mail Services
- Mailer ID


HOME | HELP | CUSTOMER CARE | SIGN OUT

---

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Mailing Reports

## Mailing Reports

- [View Transactions](#)
- [Mailing Summary Report](#)
- [Pending Postage Statements](#)
- [Mail Quality Reports](#)
- [Statement of Ownership](#)
- [Issue Level Postage Statement](#)
- [Induction Activity Report \(eInduction\)](#)
- [Publication Report](#)
- [Electronic Return Activity \(PRS\)](#)
- [View Periodical Transactions](#)
- [BRM Invoice Detail Report](#)
- [View Historical Permit Transactions](#)
- [eDocs Preparation / Entry Warnings Report](#)
- [Carbon Accounting Statement](#)
- [Tech Credit Report](#)

### Full Service

- [Data Distribution/Informed Visibility Dashboard](#)
- [Push Subscription Profile](#)
- [Full Service Seamless Invoice Reports](#)
- [Full Service Seamless Acceptance Failure Jobs](#)

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)

Search For Business Location

Location

All Business Locations ▼

[Home](#) > [Mailing Reports](#) > [Tech Credit Report](#)

## Tech Credit Report

[Tech Credit Informational Page](#)

### Tech Credit Activity

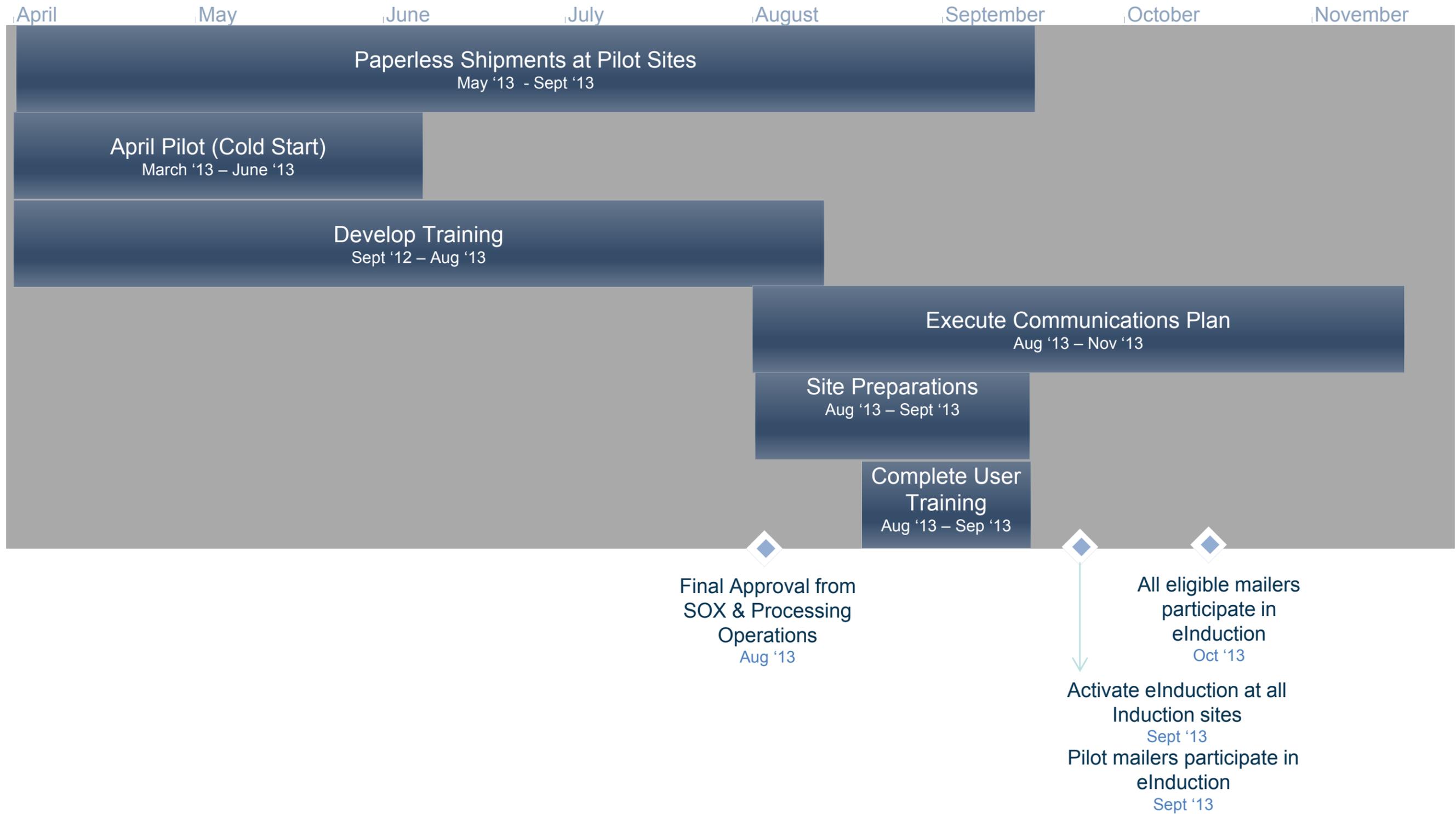
CRID	Company Name	Address Line 1	Address Line 2	City	State/Province	ZIP+4/Postal Code	Country	Qualifying Automation Volume	Initial Tech Credit balance	Remaining Tech Credit balance	Link to Postage Statement(s) where Tech Credit was applied
94543557	TITLE	555 credit boulevard		techie	CA	90210	UNITED STATES	0	200000.00	198963.72	<a href="#">PS#65428948</a> . <a href="#">PS#65431036</a> . <a href="#">PS#65431041</a> . <a href="#">PS#65447308</a> . <a href="#">PS#65455165</a> . <a href="#">PS#65455167</a> . <a href="#">PS#65484100</a> . <a href="#">PS#65485763</a> . <a href="#">PS#65509268</a> . <a href="#">PS#65744967</a> . <a href="#">PS#65809583</a> . <a href="#">PS#65809592</a> . <a href="#">PS#65809593</a> . <a href="#">PS#65810538</a> . <a href="#">PS#65812716</a> . <a href="#">PS#65812717</a> . <a href="#">PS#65818431</a> . <a href="#">PS#65818438</a> . <a href="#">PS#65818871</a> . <a href="#">PS#65818892</a> . <a href="#">PS#65818893</a> .

[PS#66079900](#) , [PS#66079901](#)

- When *PostalOne!* determines that a Tech Credit can be applied to a postage statement, it will do so after all other discounts and incentive have been applied
- Sample Tech Credit statement (PS 3602)

<b>BPM Flats Subtotal(Add lines A1-A54)</b>	<b>\$ 7,755.8000</b>
<b>BPM Flats Total (Line A55 minus A56)</b>	<b>\$ 7,755.8000</b>
<b>Part A Total(Line A57 or A91)</b>	<b>\$ 7,755.8000</b>
<b>Tech Credit</b>	<b>\$ 2,000.0000</b>
<b>Total Postage From All Parts</b>	<b>\$ 5,755.60</b>

- *PostalOne!* will apply the Tech Credit balance to qualified statements in-full
- A partial Tech Credit amount will be applied to statements if the Tech Credit amount is greater than the total postage for the postage statement
- The remaining Tech Credit amount for each CRID will be applied to subsequent statement(s)



- **In Parallel Testing**
- **Validating Software/Systems/Verification Results**
  - Netflix
  - PB Presort Service, Quad/Graphics, IWCO, NCP Solutions
  - CSG, Arandell

Mail Error Type	Level			Source		
	Container	HU	Piece	eDoc	MPE	Sampling
Undocumented			X		Yes	Yes
Delivery Point			X	Yes		
Mail Characteristic	X	X	X			Yes
Move Update			X		Yes	
Nesting/Sortation	X	X	X	Yes	Yes	Yes
Postage			X			Yes
Weight			X			Yes
Scan Rate			X		Yes	Yes

- **Mail Anywhere/Pay Anywhere**

- Demonstrate Full-Service compliance:

Provide OCI file for copal	Accurate By/For information (MID, CRID)
Valid MID in barcodes	Valid entry facility
Barcode uniqueness	Valid STID in barcodes

- Measured for a Month, Help Desk Activation

- **Permit Fee Retirement**

- Automatic Process – If 90% of mailpieces on every postage statement is Full Service
- Evaluating revising criteria to cumulative

- **Infrastructure Upgrades (May, June, Sept.)**
- **Full Service issues/gaps fixes in July and October 2013**
- **Working these through *PostalOne!* Usergroup 1**
- **Examples:**
  - First-Class Bundle Based Flats
  - Full Support of Logical Containers for all Classes
  - Support for Copal in Third Party Logical Environments
  - Postal Wizard support for Periodicals and Bound Printed Matter
  - Non-Uniqueness Exception for Mail.dat, Mail.xml < 10,000
  - Air-boxes
  - Full Service eDoc validations – corrections and enhancements
  - Full-Service Feedback & Data Distribution corrections
  - BPM Parcel Conversion from Mail.dat to Shipping Services

<b>Release Schedule: 2014</b>			
<b>Release Activities &amp; Milestones</b>	<b>January 2014</b>	<b>July 2014</b>	<b>October 2014</b>
	Price & Structural Changes	Price & Structural Changes	Non-Structural Changes
<b>USPS Announcement of Major Business Changes &amp; Requirements</b>			
Publish Release Overview	Jun 28 2013	Jan 3 2014	Feb 7 2014
<b>IDEAlliance Technical Specifications</b>			
Publish initial technical specifications	Jun 27 2013	Dec 31 2013	-
Publish final technical specifications	Jul 22 2013	Jan 27 2014	-
<b>USPS Postage Statements Publication Schedule</b>			
Publish Preliminary Postage Statements minus actual prices	Oct 4 2013	April 7 2014	-
Publish Final Price Embedded Postage Statements	Dec 20 2013	Jun 27 2014	-
<b>USPS Release Documents (Release Notes, Guides and Technical Specifications)</b>			
Publish Initial Version of Release Documents	July 12 2013	Jan 17 2014	Feb 21 2014
Publish Second Version of Release Documents	Aug 23 2013	Feb 28 2014	May 30 2014**
Publish Third Version of Release Documents	Nov 22 2013	Jun 6 2014	Sep 12 2014
Publish fourth version of release documents (release notes only)	Jan 10 2014	Jul 11 2014	Oct 24 2014
Publish Final (Post-Deployment) Release Documents	Feb 14 2014	Aug 15 2014	Nov 21 2014**
<b>Acceptance Testing</b>			
Execute Acceptance Testing	Nov 25 2013 - Jan 3 2014**	Jun 9 2014 - Jul 3 2014	Sep 15 2014 - Oct 17 2014
<b>USPS Release Deployment</b>			
TEM Software Deployment	Dec 16 2013 - Jan 3 2014	Mar 17 2014 - Jul 3 2014**	Sep 29 2014 - Oct 17 2014
Deployment	Jan 12 2014	Jul 13 2014	Oct 26 2014
Price Change Effective	Jan 26 2014	Jul 27 2014	N/A

- **Mailings will be accepted with as little impact as possible**
- **In the event of *PostalOne!* outage:**
  - Mailers can submit hard copy postage statements, or
  - In lieu of a postage statement, they can submit the Customer Log of Mailings. The Log must minimally contain the following information:
    - Permit Holder
    - Permit Number
    - Total Pieces
    - Total Postage
    - Mailer Job ID
  - Upon restoration, process electronic documentation first; any remainder gets hard copy postage statements

- **Three phased approach to upgrade SASP infrastructure for the 2014 Full-Service Mandate**

## Phase 1 (May 2013)

Upgrade Hardware

**May 4 – May 6 2013**

- Migrate SASP Database from Mainframe to the new x86 Platform

**EXTENDED OUTAGE**

## Phase 2 (Jun - Aug 2013)

Prepare for FS Mandate

**June 2013**

- Upgrade Storage for high performance and high capacity

**August 2013**

- Implement Advanced Data Compression for more efficient use of storage and hardware resources

**MINIMAL OUTAGE**

## Phase 3 (Sep 2013)

Enable  
Readiness for FS Mandate

**September 2013**

- Upgrade & expand database servers to support end state data processing and surge capacity
- Enhance application to support end state data processing capacity
- Complete migration of remaining Mainframe components to the new x86 platform

**MINIMAL OUTAGE**

- **Preproduction Environment Implemented in March 2013**
  - New 'production-like' environment for mailers to test. The environment better simulates the production system vs the customer acceptance test (CAT) environment.
- **Preproduction Data Setup issues during April Release:**
  - Postage Statement Processing
    - Mapping Errors for Standard - **CORRECTED**
    - First Class Postage Statements - **CORRECTED**
    - Preparer Permit not linked to User - **CORRECTED**
  - Mail.dat/Mail.xml Validations
    - Log entry string too long on XML Message - **CORRECTED**
    - Unable to create additional entry office for PE - **SCHEDULED JULY 2013**

- **Who can use Preprod?**
  - Any active *PostalOne!* external user with Production access. Simply login to the Production Business Customer Gateway, navigate to the Electronic Data Exchange page, and access the “Preproduction for Mailers” links.
- **What can be tested in Preprod?**
  - New release code is available in both CAT and Preprod 4-6 weeks prior to Production deployment
    - Preprod has a separate Mail.dat client from CAT
    - Preprod has separate Mail.xml WSDLs from CAT
- **Why test in Preprod?**
  - Production jobs can be submitted – without having to update the mailings or request CRIDs/permits be set up – as the environment has production reference data for CRIDs, Permits, MIDs, etc.

## Electronic Data Exchange



<b>Mail.dat Support for Production</b>
<b>Mail.dat Production</b>
<a href="#">Download Client Application (Windows)</a>
<a href="#">Download Client Application (Solaris)</a>
<b>Preproduction for Mailers</b>
<b>Mail.dat Preproduction</b>
<a href="#">Download Client Application (Windows)</a>
<a href="#">Download Client Application (Solaris)</a>
<a href="#">Go to Preproduction</a>

Data exchange testing with *PostalOne!* Customer Support is required. The system provides customers with a Test Environment for Mailers (TE) which provides mailers a way to test their file layouts and corresponding file information. The test environment will process the submitted files for the same validation as the production environment.

- **When can testing be conducted in Preprod?**
  - The deployment schedule for Preprod is the same as CAT – daily deployments during each CAT phase. There are notifications sent to all CAT users for both CAT and Preprod deployments – including whether a new Mail.dat client is required.
  - CRID and Permit reference data is refreshed from Production on a daily basis
- **How should Preprod issues be reported?**
  - During an active CAT cycle, issues should be reported to the CAT team following the normal process – email address: [PO\\_CAT@usps.gov](mailto:PO_CAT@usps.gov). Issues and questions can also be raised during the CAT Mailer calls.
  - During other times (when there is not CAT testing) the code in Preprod will be the same as the code in Production and TEM, so Production testing should be completed in TEM and should follow the standard Help Desk process.



- **Upcoming enhancements to Preprod**
  - Testing for Incentives – dependent on set-up of Program Registration application in the Preprod environment, current in progress
  - Reference data for Periodicals
    - A one-time load will be completed for July CAT testing phase
    - This reference data will be added to the regular sync process for the October CAT testing phase
  - Enhance the Electronic Data Exchange section in the BCG for ease of use and to provide updated definitions of Pre-Prod, CAT, Production

# **MTAC Focus Group Sessions**

## **Packages**

May 2013

- **Mail.Dat to Shipping Services File and Vice Versa**
- **IMpb Tolerance Thresholds and Fees or Adjustments**
- **Refund Concerns Around Federal Register Notice**
- **eVS April Release Improvements & Reconciliation Process**
- **By/For for Packages**

- **Mail.dat conversion to Shipping Services File for packages**
  - Agreed by USPS to implement
  - Will be scheduled for release
- **Shipping Services File conversion to Mail.XML for flats**
  - Was not agreed by USPS to implement
  - Will not be scheduled for release

- **Currently evaluating Federal Register feedback**
- **Working on clarifying Refund language**
- **Admin Fee will not be assessed when USPS drives Refund request**
- **Moving forward with \$50 minimum for Combined Value Added Refunds**
- **Will communicate with the industry when Refund process is finalized.**

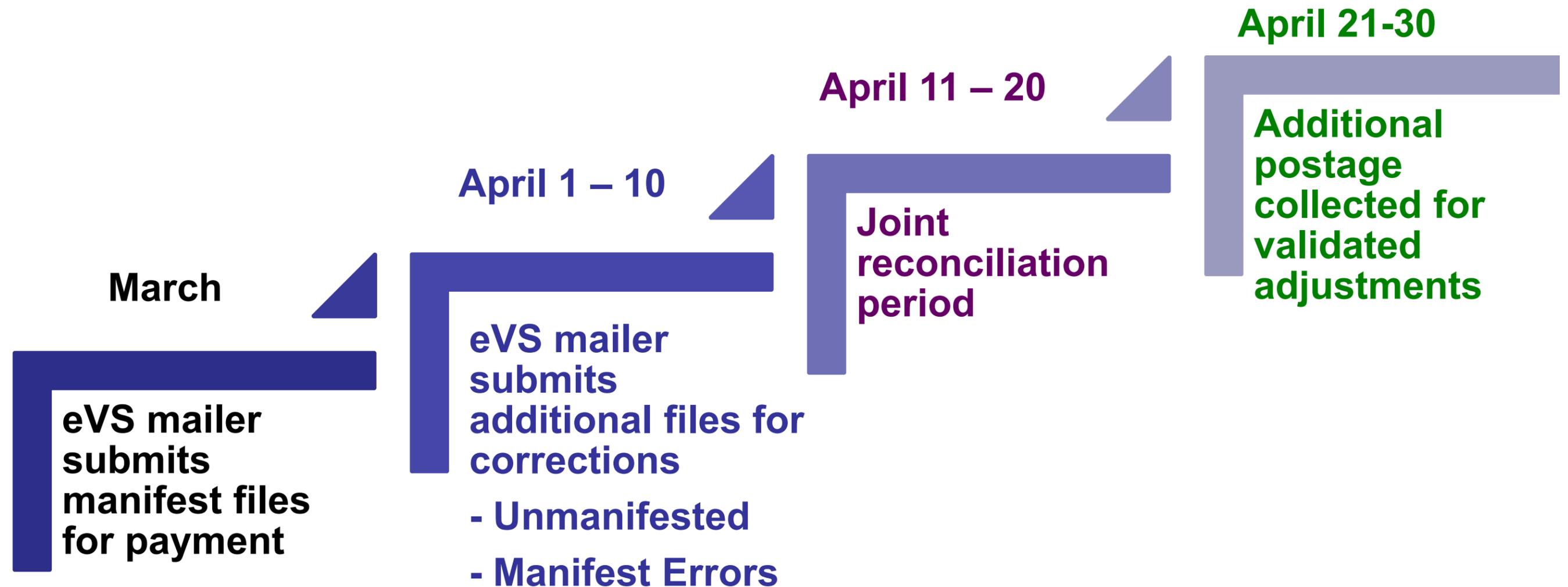
Adjustments	New functionality
Manifest Errors	Manifest rules engine implemented in April 2013 which allows the eVS team to designate business rules to price packages based on manifest data when STC is incorrect
Unmanifested	Dynamic sampling will be deployed to devices and new plan will be rolled out in May
Presort Eligibility	New reports available in eVS to support eligibility
Postage Adjustment Factor (PAF)	Small sampling automated in eVS
Misshipped DDU	<b>Manual process for any disputes for mis-shipped</b> Reviewing current functionality to determine updates needed
Destination entry valuation	Added ability to support exceptions
Duplicates	Working to refine that data

- Monthly Reconciliation  
March Postage Adjustments**

April						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- Mailers have until the 10th of the following month to:**
  - Provide files to pay for any manifest errors or unmanifested packages
  - Dispute any pending adjustments for the previous month
- Un-disputed adjustments are scheduled to be performed on the 21st of the month for the previous month**
  - Mailers must dispute any adjustments to receive a joint reconciliation
  - If mailers do not dispute the adjustments, they will be collected on the 21st of the month

- eVS will reconcile accounts following this process



Restricted Information

Mailer

Home

Summary

Balance and Fees

Postal Wizard

Electronic Data Exchange

Mailing Reports

Dashboard

Manage Permits

e-VS Customer

e-VS Monthly Account and Sampling Summary

Manifest Search

Mailer ID Report

Third Party Billing Reports

Dispute Queue

Help

## eVS Monthly Account and Sampling Summary

### Itemized Manifest Mailings

Acme Mailer, Inc.

Month 04 of Fiscal Year 2013

(01/01/2013 - 01/31/2013)

Report Date: 04/25/201

Change Month and Year

January

2013

Show Data

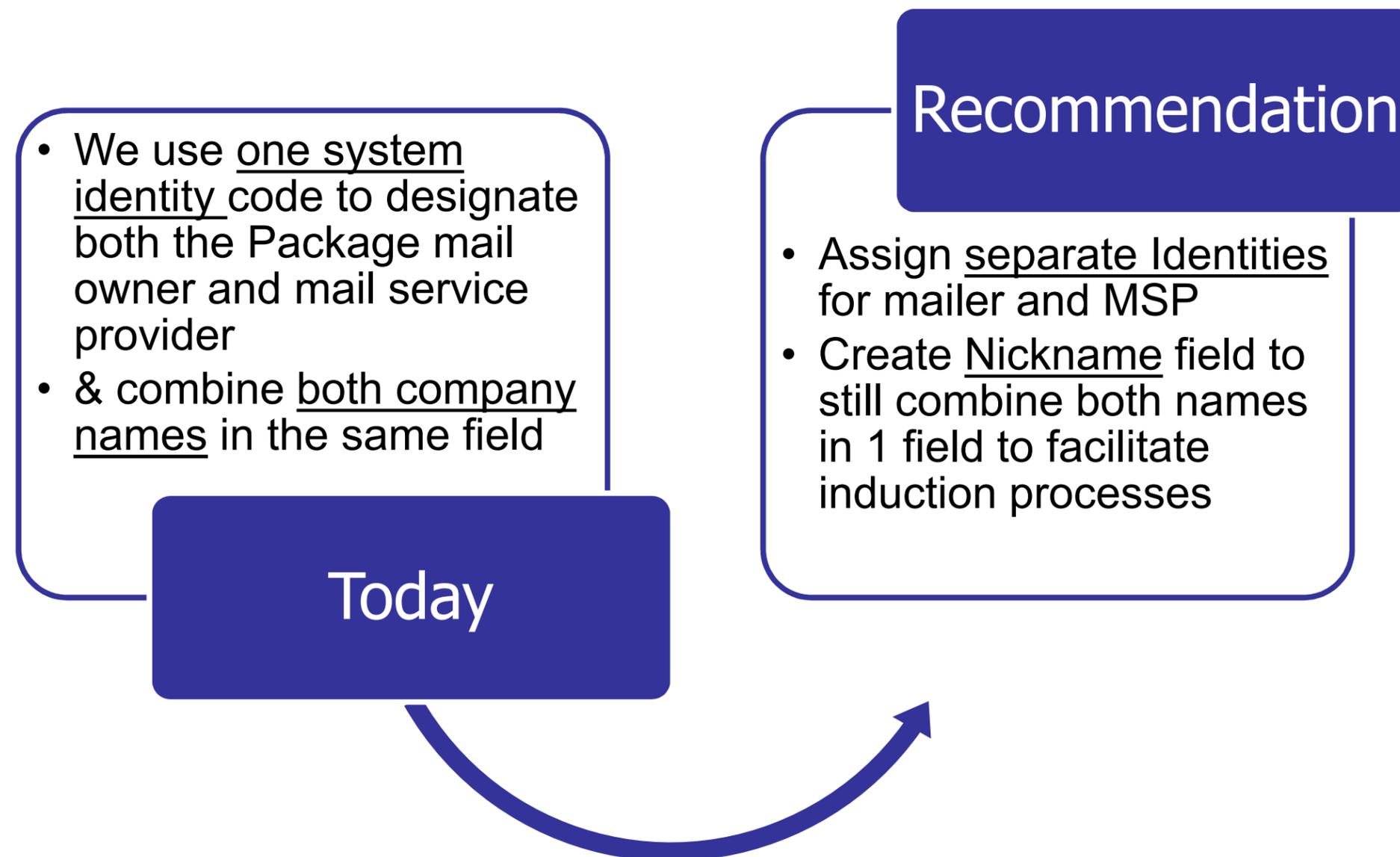
[Reports Menu](#) | [Submit Refund Request](#) | [Joint Review Request](#) | [Printer-Friendly View](#)

### Mailer Information (Live)

<b>Mailer Name</b>	Acme Mailer, Inc.	<b>Authorized Mail Classes and Subclasses</b>			
<b>Street Address</b>	123 Main Street	First-Class Package Service	Parcel Select		
<b>City, State, ZIP Code</b>	WASHINGTON, DC 20009	Priority Mail	Parcel Post		
<b>CRID</b>	1234567	Standard Mail Marketing	Bound Printed Matter		
<b>Master Mailer ID</b>	123456789		Media Mail		
<b>Mailer ID for Last Transmission of Month</b>	123456789				
<b>Master Permit Account Number</b>	PI 202				
<b>Post Office of Account 5-Digit ZIP Code</b>	20260				
<b>Post Office of Account Finance Number</b>	661204				

Permit	Company Name	Federal Agency Cost Code	Permit ZIP Code	Finance Number	CAPS Account Number
PI 202	Acme Mailer, Inc.	N/A	20260	66-1204	13333

## Problem:



## Key Changes: Business Rules and Reporting

- Add new fields to reflect capturing both sets of company names and address
- Change current company name field to Company Nickname
- Update logic to support
- Assigning correct revenue/volume to correct company (MID Owner vs MID User)
- Enable revenue reporting by consolidator or by MID User (mail owner)
- Enable data transmissions to clearly designate MID owner or MID user
- Update search options to enable search by Consolidator, MID Owner, or MID User
- Adjust reports to enable viewing of both sets of data or to enable selecting one option or the other