

## MTAC Focus Group Sessions

Wednesday, February 20, 2013

# PAYMENT AND ACCEPTANCE

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### Notes for each Focus Group Session for **Payment and Acceptance**:

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### Session 1: STANDARD MAIL

(Wanda Senne, MTAC Industry Leader, Standard Mail)

#### DISCUSSION

- Folded-Self Mailers: Even with over a year lead-time, many mailers did not grasp several key aspects of the regulation changes resulting in many printed pieces being destroyed, or an attempt to envelope them. Additional training has been placed on YouTube in video format by an industry mailer that should be modeled by the USPS.
- Weight Verification Tolerance Process (Wood Slat Pallets): Since the USPS internal communication late last fall clarifying that mailers do not have to weigh wooden slat pallets and write the weight onto them, this issue was resolved.
- MDA Support: Timely access to and answers from Mailpiece Design Analysts degraded last fall and early this year. Staffing for vacant positions and a review process across the areas coordinating leave time has been implemented.
- Technology Credit: Reviewed approach. Contact information was collected for those mailers requesting a review of their qualification for the program.
- Mailer Retention Policy for Full-Service eDoc and eDoc: Supporting documentation for mailings is retained for one year for Optional Procedure mailings (production records, printing receipts, etc.). The group asked what the policy is for electronic payment documentation. Much has changed in the e-environment that affects the retention policy across multiple postage payment methods (OP is only one of them).
- By/For Approach and eDocumentation of mail owner: The group is requesting the USPS' definition of mail owner to help facilitate the dialogue related to identification in eDocumentation and postage payment.
- eInduction and Seamless Acceptance process and status update was provided by Garrett Hoyt.
- Consideration for one-time exception for Mail Prep rule changes.

## **ACTION ITEMS**

- Develop educational material in a video format for Self Folded Mailers, working with Wanda Senne, Steve Colella, and Lisa Wurman.
  - Obtain information from PCSC and mailers on common issues and address them in the training. Typical areas of confusion are:
    - Paper basis weights,
    - Trifold design and address placement
    - Hybrid designs: Gate folded pieces, Roll folded piece
- Work with Lea Holt to understand issues with the ABRM tool.
- Recommend sending an advisory on the Tech Credit program once the credits are identified.
- Develop a retention policy for mailing documents for mailers in light of eDoc and Full Service.
- Work with mailers who need their CRIDs cleaned up, i.e., those who have multiple CRIDs for the same location.
- Develop an approach to retire ghost Permits.

<b>Session 2: PACKAGE SERVICES</b> (John Medeiros, MTAC Industry Leader, Package Services)
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## **DISCUSSION**

- Manifest Flats Sampling Weight: Discussion around decimal places to be used. USPS to review Pub 401 and DMM for consistency.
- Programming Changes from Thresholds and Potential Adjustments: Discussion around Task Team 19 Recommendations.
- Mis-shipped and Labeling List Discrepancies: Discussion around consistency with DUO changes.

## **ACTION ITEMS**

- Provide clarity on the IMpb requirements for PC postage requirements.
- Provide clarity on thresholds for IMpb, shipping services file, and address requirement.
- Consideration for eVS mailers to participate in Parcel promotions for sampling parcels scheduled in the summer.
- Resolve outstanding eVS reconciliations.
  - Mailers are concerned that sampling practices are not representative of population.
  - Vicki will review feedback and take this into account for outstanding reconciliations.

**Session 3: FIRST-CLASS MAIL****(Sharon Harrison, MTAC Industry Leader, First-Class Mail)****DISCUSSION**

- Rules & Timing for Jan 2014 Full-Service Implementation: Reviewed Full-Service Quality Feedback, including in depth review of preparation rules and available Mail Quality reports.
- PostalOne! Issues: Reviewed Full-Service issues list and Delivery Point Verification in PO! MicroStrategy timeline.
- PostalOne! Help Desk/eService Proof of Concept: Discussed Proof of Concept status and current process being tested.
- System Performance and Stability: Reviewed industry concerns, described Full-Service reporting flow. Shared status of System Infrastructure upgrades. Discussed reporting performance and provided tips to run reports more efficiently.
- Technology Credit Update: Reviewed approach. Contact information was collected for those mailers requesting a review of their qualification for the program.
- Mail Anywhere / Pay Anywhere Update: Reviewed concept. Provided pilot status. Discussed participation criteria.
- Mailer Retention Policy for Full-Service eDoc and eDoc: Supporting documentation for mailings is retained for one year for Optional Procedure mailings (production records, printing receipts, etc.). The group asked what the policy is for electronic payment documentation. Much has changed in the e-environment that affects the retention policy across multiple postage payment methods (OP is only one of them).
- By/For Approach and eDocumentation of mail owner: The group is requesting the USPS' definition of mail owner to help facilitate the dialogue related to identification in eDocumentation and postage payment.

**ACTION ITEMS**

- Mailers raised an issue on the single piece residual mail: They would like to use the same envelope for retail versus residual mail. It would be cost prohibitive for the industry to have to create a new envelope. The main drivers for single piece are size and lack of updated addresses.
  - Provide clear communications to BME on how to define residual mail.
  - Address the revised approach per the PRC ruling.
- Clearly define containerization requirements for Full-Service to resolve ambiguity on when a pallet placard/container barcode is required (IMcb).
  - Provide recommendations on whose Mailer ID to use on Containers and Trays.
    - BMEU vs DMU
    - Clarify existing DMM language
    - Update DMM language to include recommendations

- Create a subgroup to review MicroStrategy reports and selection criteria.
- Develop a retention policy for mailing documents for mailers in light of eDoc and Full Service.
  - Define storage policies for the different data elements.
- Share the 2014 Structured Release cycle with the industry.
- Develop a comprehensive Help Desk policy to address the request of integrating eServices with *PostalOne!*
  - Include a Mail Service Provider in the pilot.

## PERIODICALS

(John Stark, MTAC Industry Leader, Periodicals)

### DISCUSSION

- Airbox Update: Discussed Air Box as acceptable container for eDoc. Requested volunteers for Mail.dat mapping.
- Technology Credit Update: Reviewed approach. Contact information was collected for those mailers requesting a review of their qualification for the program.
- PO! Calculation of Standard Postage for Pending Periodicals: Discussed current status and timeline for corrected mapping.
- Additional Entry Changes: Discussed scenarios and results/impacts.
- Streamlined Weight and Ad Percentage Capture Process Work Group Update: Provided Work Group update for pilot process.

### ACTION ITEMS

- Work with Mail.dat technical group to define the software solution for air boxes.
- Send out a document explaining changes to additional entry process.
- Start a workgroup to streamline/automate the Statement of Ownership 3526 and the 3510 Change in Profile.