

## MTAC Focus Group Session Notes

Wednesday, January 13, 2016

### **PAYMENT AND ACCEPTANCE, EDUCATION**

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#### 9:00-First Class

#### Action Items

- Linking PO Boxes to Payment Accounts
  - USPS to reach out to mailers who have provided business cards to start inventory process for PO Boxes, caller services and reserve and guide them through the process of filling out the spreadsheet.
  - USPS will work with Mark Kolb to define mail service provider scenarios.
  - Jennifer Howard's team to create the means to authorize online permit account creation online in release 2.
  - Jennifer Howard's team will devise a system to allow MSPs to deposit checks online for customers.
  - Answer the question about what happens when an MSP is managing PO Boxes for mail owners.
  - Ensure that this new system will support the payment of BRM fees, permit fees, ACS fees and postage due.
- Feedback on streamline mail acceptance publication for letters and flats.
  - Error codes should be included in the "Guide to Mail Acceptance Reporting" instead of being a separate document.
  - Explain how USPS will provide notice and the methods of communication to the industry on changes and a clear definition of what is included in each of the documents.
    - There will be a 30 day comment period.
    - After the final version is released there will be another 90 days prior to implementation.
  - Online version will have current links to referenced documents.

#### Minutes

- Reviewed new Enterprise Payment System.
  - Linking PO Boxes to Payment Accounts.
- Reviewed IDEAlliance feedback on Streamline mail acceptance publication for letters and flats.
  - Mark Kolb suggested we add links to the publications anytime a document is referenced.
  - Questions about the change log and the durations for notification.
- By/For 5,000 Piece Rule.
  - If a mail owner provides part of a mailing to two different MSPs and the total is over 5000 pieces, even if each MSP receives fewer than 5000 pieces, the mail owner still should be identified where the MSP has knowledge that the mail owner is a larger mailer.

- For combined mailers with clients mailing fewer than 5,000 pieces, a customized by/for is possible.
- Mark Kolb had concern about which mailers are “known to have mailings over 5,000 pieces.”
- Explained the new AB Testing promotion and advised the team that user group 1 will review the specifications.

### 10:30-Periodicals

#### Action Items

- Enterprise Payment: Linking PO Boxes to Payment Accounts
  - USPS to reach out to mailers who have provided business cards to start inventory process for PO Boxes, caller services and reserve and guide them through the process of filling out the spreadsheet.
  - USPS will explain through a read-me how we will use the CRID in the process.
  - Dennis, John and Randy to draw out a map of how they manage their PO boxes and provide to Jennifer Howard. Workgroup will engage CDS, Palm Coast and Time customer service fulfillment providers.
  - Workgroup will draw out a plan of how publishers/fulfillment providers will be involved in the process.
- eInduction
  - Microstrategy data dump not being received by Phil Thompson from Quad Graphics. This information will be ready by the end of the day, today.
- ABRM
  - Route assignments during adjustments should not block the system out. The new ABRM process should address delay caused during route adjustments.
- Multi-stop transportation.
  - The unload scan by USPS is used to determine appointment arrival as opposed to the actual arrival time of the transportation. This will be discussed with Robert Cintron.
- Mailer Scorecard
  - In the mail owner/preparer scorecard we will determine if there should be visual indicator to show that the owner is over threshold.
- A DMM change on March 7 will allow a mail service provider to decide bundle and container allocation by weight or pieces. This will be reviewed with Becky Dobbins, and volunteers from the meeting to see if this is an appropriate approach given that the direction was changed based on issues limited to mixed class comail.
  - The group that volunteered to review the change are: John Stark, Phil Thompson, Randy Stumbo, Dale Miller, Brian Schmidt, John Wittington, Jerry Faust, and Peter Moore.

#### Minutes

- Reviewed IDEAlliance feedback on Streamline mail acceptance publication for letters and flats.
- Reviewed enterprise payment: Linking PO Boxes to Payment Accounts.
- Reviewed eInduction fixes.
  - January 3 enhancements.

- Shipping summary reports.
  - Postage statement cancellation.
  - Skip zone verification.
  - Postage Assessments.
- January 17 enhancement.
  - Payment errors.
- March enhancement.
  - Postage Assessment for extra containers from copal.
- Seamless Acceptance Undocumented.
  - Explanation of how Seamless handles undocumented pieces cause by outages or upload failures.
- Exigency rollback is targeted for early April.
  - All documentation that would be published in a price change will also be provided for the exigency rollback.
- BRM ZIP+4
  - Shared approach on how we will streamline the application of ZIP+4.
- Reviewed how start the clock is calculated for multi-stop.
- Reviewed Undocumented Process.
- MERLIN will not be retired until Seamless Acceptance is rolled out.
- Task team 23: Full Service and eInduction mailer testing.
  - USPS has tested the Microstrategy scorecards extensively.
  - Selected mailer will now be requested to start testing.
- Mailer scorecard status update.
  - Several fixes coming to Full-Service on January 31 based on Business Mailer Support test results.
    - A fix to mailers receiving multiple errors for the same mail piece.
    - The detailed error report will be enhanced.
    - There is a rounding issue with Full-Service assessment that will be fixed.
    - MID and STID details will be fixed. This issue appeared for only one job.
  - Seamless Enhancements from January 3.
    - Summary drills are now better synched.
    - Nesting/Sortation timing was fixed.

### **13:15-Standard**

#### **Action Items**

- Move/Update
  - Review with Jim Wilson what should occur when an address has a name as well as “or current resident” for move/update evaluation and error thresholds.
- For mail going out to military service members what is the timeframe for election ballots.
  - What are the impacts on the old and new addressing format.
    - Contact Tammy Patrick [tpatrick@bipartisanpolicy.org](mailto:tpatrick@bipartisanpolicy.org) (602.471.7878)
  - Dale will report on the delivery of pieces that are using new addresses for the Marines and the Navy.
- Postage statement bulk download.
  - Industry is looking for more than a .pdf format.

- A/B Testing
  - In user group 1, the definition of “job” should be clarified.

## **Minutes**

- Reviewed IDEAlliance feedback on Streamline mail acceptance publication for letters and flats.
  - Mail entry roadmap to be replaced with CIO roadmap.
  - Changes to documents will be sent out allowing 30 days for feedback and then 90 days of advance notice would be given before a change is implemented.
  - The CIO roadmap will have a draft shared with IDEAlliance by February 3.
- Task team 23 will oversee the Microstrategy scorecard testing.
  - eInduction testing begins 1/17.
  - Full Service and Seamless Acceptance testing begins on 1/31.
- Move/Update Federal Register notice is being reviewed by the USPS attorneys.
  - USPS will reach out to mailers that have an opportunity for improvement.
- Undocumented
  - Discussion will be had over causes of undocumented and solutions to errors to be found.
  - Validations can be performed when documentation can be provided to explain undocumented.
- The capability to perform bulk downloads of postage statements in .pdf has been established as of January 3 with the exception of copal statements which will be added in the March release. The industry has requested more formats.
- eInduction now supports a 10 minute window between postage statement cancellation and resubmission.
  - Previously, mailers would have to wait an extended period of time before resubmitting a partially cancelled postage statement.
- MERLIN will be retired in conjunction with the Seamless Acceptance roll out.
- The application for ZIP+4 will be automated.
- A/B Testing.
  - The specifications for A/B testing will be shared with the user group.
  - For A/B testing a job would be considered a mail.dat file, even if it’s released over a period of several days.
- By/for: fewer than 5000 pieces.
  - If a mail owner provides part of a mailing to an MSP who hands part of the mailing over to a second MSPs and the total is over 5000 pieces, even if each MSP receives fewer than 5000 pieces, the mail owner still should be identified.
- Reviewed Enterprise payment system.

## **14:45-Package Services**

## **Action Items**

- For IMpb compliance report, CRID information should be added to the report.
- Confirm if international addresses can be linked to MIDS in the proposed bulk MID tool.

- When Kevin tries to get a MID for a non-eVS package mailer, the CRID does not upload at the NCSC.
  - Ed Wanta will research the issue with Kevin and report back on his findings.
  - CRIDS should be the same regardless of if the customer is a parcel or letter/flat mailer.
- PostalOne! Contingency Plan
  - To be shared at the next user group meeting.
  - During the next outage, the information will be shared with those that have CAPS accounts.
  - We will communicate better if there is another outage that 8125s are not required for eInduction mailings.
- USPS will do a review of products that are supported in the shipping services file and have tracking but are not supported in eVS.
  - Review the registered mail product and work with Gary's shop to see if it should be included in eVS.

### Minutes

- Reviewed IMpb non-compliance report.
  - For eVS PTR will begin giving data to customers.
  - Non-eVS summary data will flow to PostalOne! in January.
  - For non-eVS BMEU accessible reports will begin in February.
- Bulk Process for MIDs.
  - Current state: Unassigned MIDs must be requested from the NCSC and then a spreadsheet to link them to customers is emailed to the NCSC.
  - Future state: Unassigned MIDS are provided electronically and the spreadsheet is uploaded to customer registration.
- eVS/PRS Refund Requests
  - Under exceptional circumstances refunds may be considered after 60 days.
- Draft documentation for eVS IMpb certification requirements.
  - IMpb software providers will be required to be eVS in order to remain on the software provider list.
  - Feedback requested for the eVS IMpb document certification document which was handed out.
    - The updated version will be available at the next user group meeting on January 21.