

## MTAC Focus Group Session Notes

Wednesday, August 28, 2019

### Payment & Acceptance, Education

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#### Session 1: PACKAGES

(Medeiros, MTAC Industry Leader)

##### Soft-Packaging (Soft Pack)

- Ability to add soft pack indicator
  - Still providing side by side data.
- Reduce the risk of soft-pack pieces subject to DIM Weight pricing through non-rectangular DIM.
- Ensuring methods of measurement are clearly defined for applicable pricing
  - Reduce risk of DIM-Weight pricing by introducing a soft-pack rate indicator in SSF.

##### Sampling and PAF - Current Sampling Approach

- IMD – sample 70 weekly packages per mailer per site.
  - Mailer must exceed 250 pkgs at a site to be sampled.
- ODIS
  - Statistically random sampling approach.
  - Primary sampler at DDUs.
- Retail
  - Performed when proof of shipment is requested.
- Current PAF
  - Is weighted by entry-facility post stratification.
- DDU Entered
  - Threshold 1.5%.
  - Lightweight 19% PAF /81% no PAF.
  - PS 7% PAF /93% No PAF.

### **Sampling and PAF - Current Sampling Approach (cont'd)**

- PPC Sampling Approach
  - Upgraded PASS machines
    - Only DDU.
    - PKGs randomly selected.
    - Sample weight/dimensions captured by PASS scales and dimensioner.
  - Clerk Sampled
    - Selects pkgs verifies manifested attributes.
- Lowering threshold from 1.5% to 1% only DDU volumes for PPC/PAF.
- Post stratification unnecessary.
- PPC PAF Threshold: 1%.
- All PAFs exceed current 1.5% threshold.
- Two months already into DIM; request is made to postpone the 1% PAF to allow mailers to adjust and develop strategies to minimize error submissions prior to introducing more stringent verification thresholds.
- Majority of errors with Parcel Select regarding DIM is lack of provided dimensions within submissions.

### **eVS July PAF**

- June implementation of DIM led to a total increase in Shippers with PAF of 1.5%.
- When removing shippers not manifesting DIM the observations were within trend.
- July 10.4% mailers with PAF, 8.9% Adj of mailers with PAF, 1.5% Impact of DIM on PAF.
- Rectangular vs nonrectangular pkgs would have been PAF'd.

### **2020 Price Change:**

- MKT Test of Saturation PlusOne allow auto Sat LTR marriage mail to include a postcard to the mailing a new separate price.

### **Un-manifested Reporting**

- USPS is considering an un-manifested eVS fee designed to encourage manifesting of all packages.
- Will apply to both eVS and Pkg Platform pkgs. Customer will only be charged for IMpb or un-manifested fees but not both.

### **Un-manifested Reporting (cont'd)**

- Thresholds to be established will have to be met or exceeded before the mailer is charged.
  - Discussion on how pkgs/pcs can result in being un-manifested.
- Will this be a FRN? Yes, most likely in the overall general 2020 price change.

### **Automated USPS Returns**

- Considering mandating the retirement of MRS and USPS Returns SPB.
- Summer 2020 FRN will be filed. No more MRS and Scan Based Payments for Returns.
- Methodology was deployed Jan 27, 2019.

### **2020 Mailing promo**

- USPS is considering the following enhancements associated to existing promotion features and platform
- Functionality will be added to BCG that would allow mailers to upload pdf sample of the mailpiece and link it to a postage statement qualifying for a given promotion.
- Consideration is being made to removing unused messaging functionality in BCG Incentive Module instead the respective contact info for email to the USPS Program office will be made available for mailers to contact the USPS Program Office.
- CY 2020 Promotion Calendar is under development.
- Related earned value promotion a third volume tier for a separate credit amount is under consideration for BRM, CRM and Share Mail volumes
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### **Action Items:**

1. Provide details of root cause issues regarding 19% reflected in "Sampling and PAF" slide. (Jordan Gouline)
2. Revisit formulas for selecting for randomness and move to 1% PAF (Vicki Bosch)
3. Revisit decision to move to 1% PAF. (Vicki Bosch/Marc McCrery)
4. Fee for unmanifested pieces – need to show details of when fee is applied, when it's not. (Vicki Bosch)
5. Consider whether to allow better pricing instead of current pricing for unmanifested if under thresholds. (Marc McCrery)

## **Session 2: FIRST-CLASS MAIL**

**(Tate, MTAC Industry Leader)**

### **Secure Destruction**

- Secure Destruction(SD) as a future Promotion incentive
  - Once customers are on SD they will not go off

### **2020 Price Change**

- **Permit Simplification**
  - Better serve customer and to utilize current and new technologies that have eliminated prior operations costs for permit creation, payment, and maintenance.
    - Annual presort fees would be eliminated for any permit used in in a Seamless Mailing.
    - Action Item with rolling fees if 99% permit fee waiver on a rolling basis.
- Request of Images from processing
  - Usage based on ACS, un-manifested
  - User Group 11 will discuss

### **2020 Mailing Promotion**

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### **Seamless Acceptance**

- FRN Sept 2019 (30 day comment period)
- Mandated for DMU's and 90% Full Service BMEU entered
- Seamless Parallel by March 1 2020
- Seamless by Feb 1 2021

- Retirement of manual verification for mailers submitting over 90% FS volume July 1 2021
- Auto finalization of Seamless postage statement even if permit fees are due for renewal
  - Posting dates float 12 months 16 months 18 months
  - Incentives for Seamless? Not off the table. Looking at 2021.
- Seamless Sampling Approach
  - Remove general PAF (Weight, Payment, Mail Characteristics (Processing Category/Non-Profit))
  - Perform Sampling current state (1,3,30)
    - Implement downstream Sampling
    - Potentially adjust error logging threshold to account for downstream sampling
    - Evaluate Frequency of Downstream Sampling
  - Compare Sample Weight, Payment, Mail Characteristics to eDoc Job/Version/Segment
  - If error logged for Weight, Payment, Mail Characteristics assess across job/version/segment volume
  - Establish Error Threshold for Weight, Payment, Mail Characteristics
  - Proposal would initially look at Periodical mailing (Future state would be across all categories or classes)
    - Issue brought was that it would be brought to all platforms

#### **Permit Balance Validation for MSPS**

- Within P1! The balance check screen would display for MSP only. Check BCG to see if they are flagged as an MSP
- If flagged as an MSP, user would enter Permit, Permit Type, Permit /city, Permit state, Finance Number (optional), and amount of postage
- P1! Checks the postage amount against the permit balance in either Local Trust, CAPS, or EPS to determine if there is enough funding to cover the postage
  - P1! Would only look at postage amount provided, and will not consider any other UPD postage statement for the comparison
- The screen would provide back if there is enough funds or not to cover the postage
  - Display a disclaimer that the balance is only a point of reference

### **Business Customer Gateway (BCG)**

- Revoke and Archive User Access
  - BSA/Delegates will have the ability to revoke and archive Users under
  - BSA/Delegates will be directed to the revoke and Archive
  - Once a User is selected, the BSA/Delegate will see all of the CRIDS and services
  - BSA can use the select all to revoke all services
  - Can also revoke and archive all services under a specific CRID(s)
  - Revoke users access by individual services
  - Manage users page will be updated for the BSA and all Delegates. Saved changes occur system wide.

### **ACTION ITEMS**

1. Research feasibility of fee waiver calculation on rolling versus current year-end cutoff basis. (Randy Workman)
2. Research giving mailers an incentive (promotion) – apropos of secure destruction. MEPT to talk to Gary Reblin. (Marc McCrery)
3. Research requiring implementations of new rule requirements for a time frame interval after the final rule rather than specific calendar dates. (Randy Workman)
4. Consider adding a quarterly BCG push to the BSA reminding them to validate authorized users. (Leider Chang)
5. Consider how to provide images on PAF (when exceeding threshold) for sampled pieces to mailers. Consider photos at point of downstream Seamless scanning to distinguish clerk versus non-clerk errors. (Randy Workman)

### Session 3: PERIODICALS

(Stumbo, MTAC Industry Leader)

#### Seamless Acceptance (SA)

- Provide a go live date for FPP status on long run CPP titles process
  - Containers have been accepted working process to distribute any errors resulting from the mailings
- SA w/verification on exceptional dispatch
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  - Revoke users access by individual services
  - Manage users page will be updated for the BSA and all Delegates. Saved changes occur system wide.
- Revoke and Archive Access page
  - Due to list of users within the BCG the list grows as employees leave your organization
  - Scenario 2 for user who has not left company but shifted to another area with different BCG Tasks will allow the user access to BCG but some levels within the BCG would be modified based on the user's needs.
  - Could USPS do the initial user purge if a list was provided due to the complexity of the number of users and the fact each user would need to be purged individually
  - Pilot Launches 2020



## **EPS**

- 93% of eligible CAPS have been migrated
  - eVS will be available in Aug
  - Timeline for the non-CAPS to move to EPS
    - Strategy is being looked at. Biggest push is to deactivate CAPS
    - Concern is to remove dormant CAPS accounts
    - Reversals does not show up on EPS only for PERs. Appears as another transaction and is not accurately reflecting the type of reversal. Comes in as “other”
  - EPS account does not appear on postage statement. Change of request has been submitted and approved for 2020 price change.
    - Postage check was deposited in EPS account in a retail site but with little details as to where.
      - Would like to see where check was deposit. I.E. Zip Code
      - Customer switches over to EPS but customer did not set bank account higher.

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## **ACTION ITEMS**

1. Explore full service eligibility of an in-county periodical to see how it affects mailer full service scores. (Randy Workman)
2. Investigate whether mailer can send a list to USPS for bulk edits/changes/removals of user information in the BCG. (Leider Chang)
3. Research whether possible to change transaction designation under EPS reversals (currently, transaction doesn't show up as periodical, but rather as "other" – then when it goes back in it says periodical: 1 – Periodical, 2 - Other, 3 – Periodical). (Mike Filipski)
4. Determine whether USPS can include location info on retail account deposits into EPS. (Randy Workman)
5. Customer went to EPS, bit didn't set bank limit high enough. EPS hits three strikes, then goes to trust. Because of the negative balance customer also made to add another ACH Debit instead of revising the original. Also couldn't mail right away because the changeover in account is only reflected the next day. Review EPS fact sheet, ensure maximum is set to cover mailing prices. (Randy Workman)

<b>Session 4: USPS MARKETING MAIL (Flanagan, MTAC Industry Leader)</b>
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### **EPS**

- Aug 20 202 Commercial Postal Store
- EVS Aug 20 2019
- EPS Transaction # not populated on postage statement – change request has been approved and will occur during Jan 2020 Price change
  - Q: Non caps customer to transition – No time line
  - Q: Customer with traditional permits will there be a transaction #? - Transaction # will appear.

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9/4/2019

**ACTION ITEMS**

1. Informed Delivery process for when discount not successfully claimed. Further develop the process, add the payment steps at the local level. (Randy Workman)
2. Confirm date shipping fee goes away for stamps shipped to the mailer versus the local post office.(Bill Craig)
3. Identify mailing standards/requirements for the PlusOne physical piece. (Tariq Mirza)