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United States Postal Service

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# **Mailers' Technical Advisory Committee (MTAC)**

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January 29, 2020



# Agenda

- MTAC Open Action Items
- Mailing & Shipping Solutions Center (MSSC)
- Business Customer Gateway (BCG)
- Political & Election Mail
- Fee Waiver
- Enterprise Payment System (EPS)
- eInduction Discussion
- Package Platform
- Electronic Verification System (eVS)

## Action Items



# MTAC Open Action Items

Topic	Action Item	Response
Periodicals	Create an MTAC Workgroup to evaluate and streamline the application and Pending Periodical process. This workgroup should also streamline the process of migrating ownership and additional location definitions.	3510 is scheduled for January 2020 release. Plan is to deploy 3510 first then decide if we should continue with 3500.
Periodicals	Provide an update on the Statement of Ownership template – is there access to a blank template <i>on PostalOne!</i> ?	An online statement of ownership application is available in PostalOne! In the PostalWizard section where other online applications are contained
Seamless	Investigate Seamless Acceptance sampling errors	Randy to follow up
Seamless	Consider going to tiered weight ranges rather than ounce-based weight thresholds - could assist with Seamless Acceptance issues for flats.	Part of Task Team 30. Has Pricing awareness. Closed
EPS	Determine whether USPS can include location info on retail account deposits into EPS.	Development team is working with Accounting on a solution. Release date TBD
EPS	ACH Debit amount not matching what was uploaded to <i>PostalOne!</i> for Periodical. Reported by Jason Keifer. USPS to research issue.	Issue Closed
<i>PostalOne!</i>	Provide an update on testing for FPP status on long run CPP titles. What happens in comail?	We are looking to have another test following the 1/20/2020 release which will allow error deactivation for mailings that are in an EST status. CPP titles within Comail jobs would be treated the same way as the proposed process.
<i>PostalOne!</i>	Provide images of mailpieces to Mail Service Provider when there is an issue. All classes interested.	Paul received response from Privacy; under review including Inspection Service, will discuss by 1/20
<i>PostalOne!</i>	Investigate mailers inability to determine permit holder with insufficient funds on an individual mailing at submission or prior. USPS to provide notification at permit level of which permit did not have sufficient funds in a combined mailing.	Will discuss during this session. <a href="#">Slide 10</a>
<i>PostalOne!</i>	Research feasibility of fee waiver calculation on rolling versus current year-end cutoff basis.	Development teams have analyzed LOE; price prohibitive; root cause is lack of rolling average; discussed buffer arrangement of anniversary date plus 30 days. Not included in Jan 2020 release
<i>PostalOne!</i>	Explore with IT - no releases day prior to holiday OR provide support on holiday.	USPS will plan not to perform releases on holidays unless in the event of an emergency, in which case we will ensure notification and proper support by USPS. Closed



# MTAC Open Action Items

Topic	Action Item	Response
eVS	Consider separating unmanifested and IMpb for fee calculations.	Not under consideration. Closed
CRID Management	Evaluate all USPS systems that generate new CRIDs to ensure that duplicate CRIDs are not generated extraneously (WG 184).	Continuously working with WG184 to work through identifying more controls to eliminate duplicate CRIDs; Randy to work with Barbara's group and system owners to identify where new CRIDs are created.
Packages	Consider separating unmanifested and IMpb for fee calculations	Unmanifested and IMpb will not be separated for fee calculations
Packages	Status on individual exceptions for census entry and how USPS will ensure all who need exceptions, get their exceptions in the errata files for Package Platform	USPS will not be putting individual mailer exceptions for errata files in Package Platform
Packages	Follow up with Operations team to ensure errata files are accurate	In process of working with Operations
Packages	EVS and EPS - update is requested to understand where we are with both and getting assistance on these topics through help desks.	Not promoting mass onboarding yet and will communicate to the industry when ready to onboard
Packages	When will the USPS allow eVS support staff access to the EPS data?	If needed eVS analysts will be allowed to access the EPS data
Packages	Provide APV data to industry and provide details on rounding impact	See slide
Packages	USPS to communicate the methodology utilized for sample randomness	See slide



# MTAC Open Action Items – Pre-MTAC Webinar Jan 2020

Topic	Action Item	Response
Seamless	Would like to understand MEPT support for mailers going seamless	To be addressed at MTAC in Q3
EPS	EPS – Fee auto renewal, pushed from Jan 2020 to March 2020.	To be addressed at MTAC in Q3
BMEU OSAT	BMEU Customer Service Survey – details on how USPS scored 95%	To be addressed at MTAC in Q3
USPS Strategic Plan	USPS 5 Year Strategic Plan – provide details on re-establishing Customer Business Solutions Center.	To be addressed at MTAC in Q3

# Mailing & Shipping Solutions Center (MSSC)

Post Deployment Update



# Mailing & Shipping Solution Center (MSSC)

## Improving the Customer Experience

The MSSC utilizes the following methods to continuously improve the customer experience:



**MRC Huddles** keep MRCs up to date on help center performance and allow for an opportunity for MRCs to share comments, concerns, or questions with the group



**Trainings** to facilitate knowledge growth for both new MRCs and existing employees



**Office Visits** to engage with the MRCs on a personal level and to provide an opportunity to conduct one-on-one face-to-face training and coaching sessions



**Quality Reviews** MSSC Supervisors listen to call recordings to identify training and coaching opportunities



**Automated Analytics** Enhancing customer access points for self-help such as email and chat to improve overall CEX. Analyze Agent Behaviors – What Topics do MRC's need additional training on? Why are some MRCs providing better CEX than others?





# Mailing & Shipping Solution Center (MSSC)

## MSSC Voice Survey

Currently, customers are emailed a Survey Link after their issue is resolved in ServiceNow

The MSSC is transitioning to a **voice survey** where customers who call the MSSC Helpdesk will be invited to take the survey after their call concludes

### Looking for volunteers from the industry to provide feedback

KPI	Question or Message Verbiage
Greeting	Thank you for taking the survey. Your opinion matters. This will be a brief 5 question survey to gain feedback on your call experience with the Mailing and Shipping Solutions Center.
IssueResolution	Did you receive a satisfactory resolution to your question or issue? If yes, say 'yes' or press 1. If no, say 'no' or press 2.
OSAT	Please tell us how satisfied you were with the overall experience provided by the Mailing and Shipping Solutions Center, with 6 being very satisfied and 1 being very dissatisfied.
Knowledge	How would you rate the Mailing Requirements Clerk's knowledge, with 6 being very knowledgeable and 1 being extremely unknowledgeable?
Courtesy	Did the Mailing Requirements Clerk treat you with courtesy throughout the call, with 6 being very courteous and 1 being very discourteous?
FirstCallResolution	How many times have you called the Mailing and Shipping Solutions Center about this same issue or question? If this is your 1 <sup>st</sup> time, say or press 1. If this is the 2 <sup>nd</sup> time, say or press 2. If you have called 3 or more times, regarding this same issue, say or press 3.
FreeTextComment	Finally, if you'd like to leave a recorded message with your feedback, say 'yes' or press 1. If you don't wish to leave any comments, say 'no' or press 2.
Comment	Please provide any feedback you would like to share. You can record a message up to two minutes in length.
Closing	Thank you for taking our survey. We value your feedback.



## MSSC Voice Survey Benefits

- ✓ USPS anticipates a much higher take rate with the voice survey
- ✓ Voice survey results produce higher quality data
- ✓ Anticipated launch date for the MSSC Voice Survey is **February 3<sup>rd</sup>, 2020**



# Business Customer Gateway (BCG)



# Business Customer Gateway (BCG)

## Phase 1



- New BCG User Interface & Style
- BCG Homepage
  - Enterprise Payment System
  - Mailer Scorecard
  - Recent Mailings (*PostalOne!* Dashboard)
- Account Management Enhancements
  - Revoke and Archive Functionality for Business Service Administrators (BSA) and Delegates



## Phase 2 (Planned)

- BCG Homepage
  - Informed Delivery
  - Informed Visibility
  - Package Platform Scorecard
- Address Verification Enhancements
- Account Security Improvements
- Master Service Administrator/Approver Updates
- Implementation of Task Team & Pilot Group Feedback

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The pilot phase will give customers the opportunity to test and provide feedback on the new BCG

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### Pilot Link

-A separate prototype link will be provided to testers

-Pilot testers will still be able to access the current BCG

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Pilot Launches  
February/March  
**2020**

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# The New BCG Homepage



## Welcome, Kadar Hall

22251886 POSTAL, 850 N RANDOLPH ST, ARLINGTON, VA 22203-1978

Next Permit Fee: **\$130,045.45** due 06/12/20

[View Permit Fee Calendar](#)

### Account Overview

By EPS#

By Permit#

Select EPS#:

postalnicknamesdummydataandnumber - 49

**\$23,628,775.00**

Current Balance

**\$3,255,523.00**

Pending Transactions

Status:

[Enterprise Payment System](#)

### Mailer Scorecard

eDoc Submitter

Mail Preparer

Mail Owner

June 2020

#### Program Status

! Full Service ⓘ

! Move/Update ⓘ

Seamless ⓘ

eInduction ⓘ

#### Top Errors

! Seamless - Nesting/Sortation **2.87%**

! Full Service - Bar. Uniq. Piece **2.95%**

! Move/Update - COA **2.87%**

Full Service - Bar. Uniq. Handling Unit **0.95%**

[Mailer Scorecard](#)

### Favorite Services [Edit](#)

Customer Label Distribution >

CSAs >

eVS >

Every Door Direct Mail >

Incentive Programs >

Manage Permits >

PFS Local >

Printer Directory >

Scan Based Payment >

FAST >



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## Revoke And Archive



# Account Management Enhancements

## Manage User Access

Business Name & Location	User	Service	Access Level ⓘ
'TESTING SERVICES 3' 4840 WESTFIELDS BLVD CHANTILLY, VA 20151-4220 CRID: 20526842	<a href="#">NINETY-TWENTY EADMIN</a>	Parcel Data Exchange (PDX)	BSA Delegate ▾
'TESTING SERVICES 3' 4840 WESTFIELDS BLVD CHANTILLY, VA 20151-4220 CRID: 20526842	<a href="#">NINETY-TWENTY EADMIN</a>	Premium Forwarding Service Commercial™	No Access ▾
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# Account Management Enhancements

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## Control Access to Your Services

Use this page to control who can or cannot access the services for which you are the Business Service Administrator (BSA). To find a specific user, service, or location, use the filters to narrow down the list.

### To Revoke and Archive Records:

If you are a Business Service Administrator or Delegate you can revoke your Users' access to services and archive these records. Archived records will not be displayed under Manage Users for the BSA or Delegates.

### [Revoke and Archive Users](#)

Filter by Location:

Filter by Service:

Show only **Pending** requests

Filter by User:

Filter by Access Level:

**Reset All Filters**



# Account Management Enhancements

## Control Access to Your Services

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[Revoke and Archive Users](#)

Filter by Location:

ALL



Filter by Service:

ALL



Show only **Pending** requests

Filter by User:

ALL



Filter by Access Level:

ALL



Reset All Filters





## Revoke And Archive

If you are a Business Service Administrator(BSA) or Delegate you can revoke your Users' access to services and archive these entries. Archived entries will not be displayed under Manage Users for the BSA or Delegates.

Instructions:

Step 1: Select a User from the drop down

Step 2: Select services to revoke and archive

Step 3: Click Save

Step 4: Click Confirm

Business Service Administrator and Delegates can restore an archived entry by unchecking the entry and clicking Save and clicking Confirm.

[Back to Manage Users](#)

Select User





# Select Record to Archive

## Manage User Access

Business Name & Location	User	Service	Access Level <sup>?</sup>
'TESTING SERVICES 3' 4840 WESTFIELDS BLVD CHANTILLY, VA 20151-4220 CRID: 20526842	BHUVANA RAJAMANI	Parcel Data Exchange (PDX)	No Access <sup>?</sup>

Select User

Rajamani, Bhuvana

Select All

Filter by Business Name, Address or CRID



Reset

'TESTING SERVICES 3'  
4840 WESTFIELDS BLVD, CHANTILLY, VA 20151-4220

CRID: 20526842

- Parcel Data Exchange (PDX)
- Premium Forwarding Service Commercial™

Back

Save



# Revoked And Archived Record

## Manage User Access

Business Name & Location	User	Service	Access Level ⓘ
'TESTING SERVICES 3' 4840 WESTFIELDS BLVD CHANTILLY, VA 20151-4220 CRID: 20526842	<a href="#">NINETY-TWENTY EADMIN</a>	Parcel Data Exchange (PDX)	BSA Delegate ▾
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- Available to Business Service Administrators and their Delegates
- Archived records can be restored if needed

## Manage User Access

Business Name & Location	User	Service	Access Level ⓘ
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## Political & Election Mail



# What is Political Mail?



**Any mailing** created by a candidate or other Political Messaging Organization

- Political Action Committees (PACs)
- Super-PACs
- Other organizations engaging in issue advocacy or voter mobilization

- ✓ First-Class Mail
- ✓ USPS Marketing Mail
- ✓ Every Door Direct Mail

## Flag It & Tag It!

- **“Flag It”** -Mailers using eDoc should flag the mail as Political Mail
- **“Tag It”** - Mailers should use Red PS Tag 57 – Political Campaign Mailing





# What is Election Mail?



**Any mailing** created by an authorized voting registration official mailed to a U.S. citizen for the purpose of voting

Official Election Mail™ logo can be used on **all classes of mail** and **all processing categories**



- Mail-In Ballots
- Absentee Ballots
- Ballot Materials
- Voter Registration Cards
- Absentee Applications
- Polling Place Notifications

- ✓ First-Class Mail
- ✓ USPS Marketing Mail

## Flag It & Tag It!

- **“Flag It”** - eDoc should be flagged as Election Mail
- **“Tag It”** - Tag 191 can ONLY be applied to Vote-by-Mail Ballot and Absentee Ballot mailings
- Mailers should use **Green Tag 191 Domestic and International Ballots** to identify trays and sacks that contain ballot mail





# Absentee Ballots & Vote-By-Mail



**An Absentee Ballot** is a ballot completed and typically mailed in advance of an election by a voter who is unable to be present at the polls

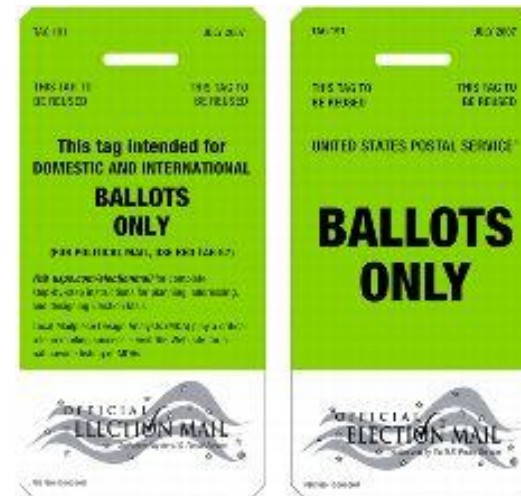
**Vote-By-Mail Ballots** are mailed out in advance of Election Day, and thus voters typically have an “election period,” not just a single day, to vote

Three ways for voters to cast a ballot before Election Day:

- Early Voting
- Absentee Voting
- Mail Voting

## Flag It & Tag It!

- ✓ First-Class Mail
- ✓ USPS Marketing Mail



- “**Flag It**” - eDoc should be flagged as Election Mail
- “**Tag It**” - Tag 191 can ONLY be applied to Vote-by-Mail Ballot and Absentee Ballot mailings
- Mailers should use **Green Tag 191 Domestic and International Ballots** to identify trays and sacks that contain ballot mail



# Military APO/FPO/DPO Ballots



The Postal Service and the Military have joined forces to provide special handling of absentee ballots to overseas military personnel

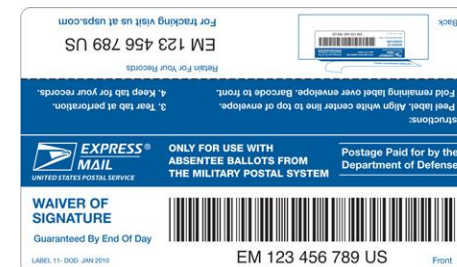
Military absentee ballots should be mailed **at least 45 days prior** to November 3, 2020

The Military Postal Service distributes the labels overseas and pays for the postage

- Military absentee ballots must be directed to the **Chicago International/ Military Service Center (ISC) gateway and the Miami International Service Center**
- Military absentee ballots receive special handling including accelerated sortation, special tray identification, and priority transportation

Overseas U.S. military and civilians return absentee ballots via Military/ Diplomatic Postal Service (APO/FPO/DPO) or international mail system

- ✓ First-Class Mail
- ✓ USPS Marketing Mail



## “Flag It”

- eDoc should be flagged as Election Mail

## “Tag It”

- APO/FPO/DPO addressed absentee ballots can be returned via Priority Mail Express® using **Label 11-DOD**
- Ballots sent with **Label 11-DOD** are delivered on the day they arrive at the destination Post Office
- The Military Postal Service distributes the labels overseas and pays for the postage

# Flag It & Tag It!



**Fee Waiver**





## USPS has proposed to change the Fee Waiver logic to add a configurable buffer period after the start of each new anniversary period

- A new anniversary period is when the first mailing is submitted after a fee ends or a fee waiver is terminated
  - The buffer period is based on a configurable value that can be set and changed as necessary
  - The buffer period will be part of the one-year period
  - The buffer period will apply to both Full-Service and Full-Service Eligible percentages
  - During the buffer period, the percentage will be calculated but the fee waiver won't be terminated until after the buffer period
  - After the buffer period, if either Full Service (90%) and/or Full Service Eligible (75%) percentages are below the threshold then the fee waiver will be terminated
- 
- If the fee waiver terminates then the mailer will be charged the mail class permit fee – *Applies to manual and automated fee payment*
  - USPS is awaiting development pricing information to make a final decision on this Fee Waiver logic

*Note: Fee waiver calculations occur nightly*

# Enterprise Payment System (EPS)



# Enterprise Payment System (EPS)

Remaining CAPS accounts used for mailing **Letters and Flats *only*** will be notified by letter and e-mail on **2/1/2020** of the following closeout processes as applicable:

Account Type		
Active Trust Account	Active Debit Accounts	Accounts Unused for 1+ Years
<ul style="list-style-type: none"><li>• 90 days to migrate</li><li>• After 90 days USPS will open EPS trust on customer behalf, transfer any remaining funds, and inform them of new account number(s)</li><li>• Customers may need to begin funding this new EPS account to continue mailing</li></ul>	<ul style="list-style-type: none"><li>• 90 days to migrate</li><li>• After 90 days will lose ability to mail until setup either new EPS trust or debit</li></ul>	<ul style="list-style-type: none"><li>• Accounts closed after 60 days</li><li>• Customers must request refunds of any remaining balance by responding to the letter/email</li><li>• Customers may choose to migrate to EPS as an alternative</li></ul>



## Discussion Topic

### eVS to EPS Customer Support



#### Issue

Current USPS eVS personnel know the client (have a specific contact) and can assist quickly – EPS helpdesk is for general issues and tends to take much longer

The USPS Help Desk in Memphis is not the correct resource to answer questions and help manage national accounts. (Refund & Assessment questions unanswered - told to contact BMEU)



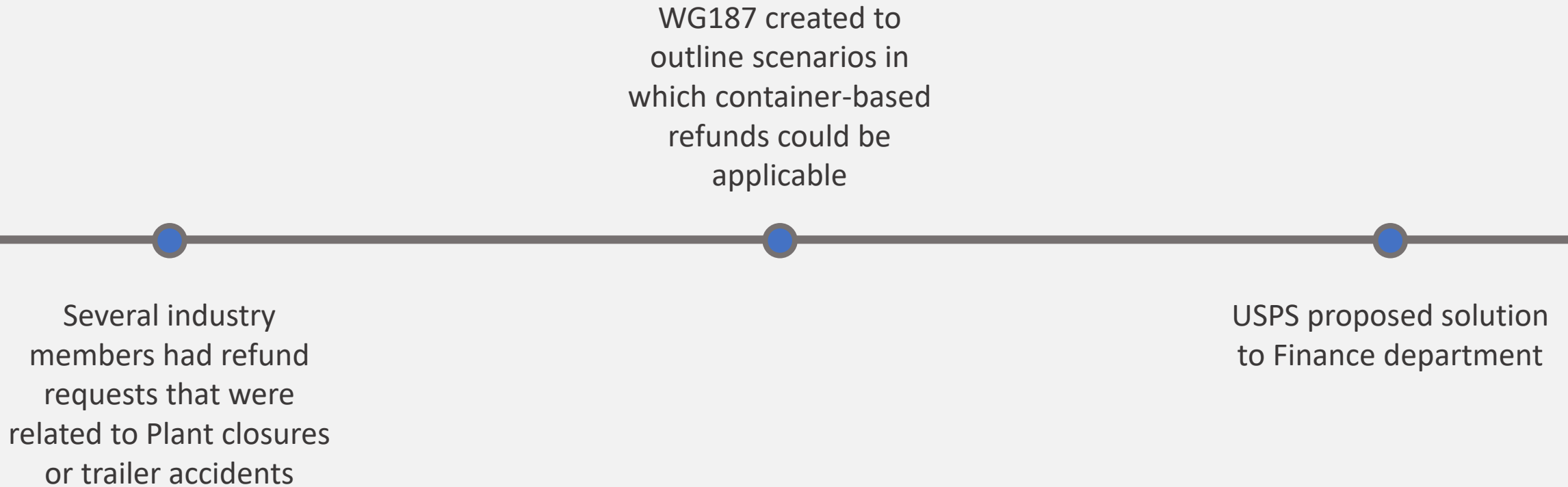
#### Resolution

USPS needs information on the specific issues that customers are facing that are going unresolved

USPS will utilize this information to improve our eVS to EPS migration support



# Container Based Refund Process



**USPS has proposed a resolution which is pending approval from Finance**

**USPS will share the action plan with the industry as soon as possible**

# eInduction Discussion



## Discussion Topic

# eInduction



## Issue

- Inconsistency at facilities with eInduction and errant pallets—sometimes pallets are rejected, sometimes accepted and processed. Seems that SOPs are not being followed
- DDU eInduction pallets still getting rejected
- DDU's need to be reminded how to scan for eInduction pallets. They should not refuse eInduction pallets because they are missing 8125s



## Resolution

USPS is actively working with Operations to create a field employee Communications & Training plan to help resolve these issues

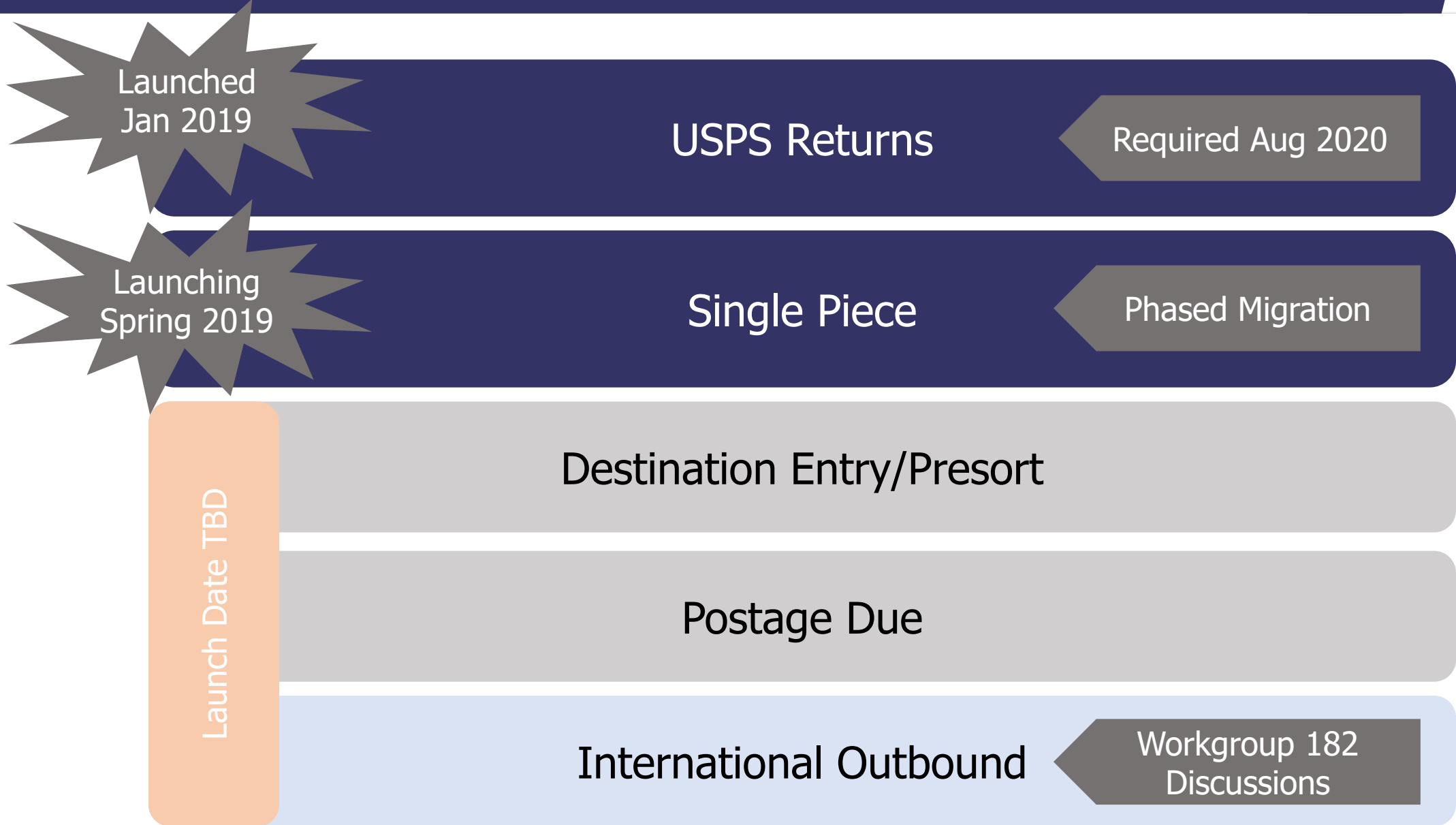
The training and communication efforts will begin **February 2020**



# Package Platform



# Package Platform Status





## Soft Packaging Indicator

USPS will propose New Extra Service Code to indicate soft packaging

Other options considered but not pursued include the repurpose a field(s) in the Shipping Services File

- Removal\_ind
- Ancillary\_srvc\_endorsement
- Non-incidenta Enclosure Processing Category



# Census Entry – Rounding Impact

## Rounding Impact:

- The weight tolerance will initially be set as 2 ounces
- If the captured weight is within the weight tolerance, then the manifested weight will be used
  - Otherwise, the captured weight will be used
- **25%** of observed weight errors in APV are within the 2-ounce threshold

Manifested Weight	Captured Weight	Within 2 ounce Threshold	Weight Used in Pricing
11 ounces	13 ounces	Yes	Manifested
2 pounds 13 ounces	2 pounds 12 ounces	Yes	Manifested
4 pounds 14 ounces	5 pounds 1 ounce	No	Captured
13 ounces	1 pound 0 ounces	No	Captured



# Postage Adjustment Factor (PAF)

## PAF

- PAF will only apply to DDU Claimed Volume at sites without ADUS
- PAF Threshold is 1.5%
- Package sampling will be randomized

Sample generation will be based on the following criteria:



### Mailer Profile

Package distribution, number of DDU sites, dimensional volume



### Site Profile

Package distribution, number of DDU mailers



### Sample Site Volume

Sample collection will be correlated with overall site volume



### Mailer Volume

Tiered into high, medium and low



### Mail Class

Samples are correlated overall complexity of mail class

eVS





# eVS Manifest Reconciliation

Manifests received after the **10<sup>th</sup>** of the month **will not** be reconciled against unmanifested pieces from the previous month

Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
30	1	2	3	4	5	6
7	8	9	10	11	12	13

Reconciliation will conclude on the 11<sup>th</sup> of the month.



# eVS Refund Policy

## c. Refund:

All refund requests, including refund requests for Unused Labels must be **submitted in writing within 60 days from the date of mailing with appropriate documentation**; otherwise, no refund request will be considered except in extenuating circumstances. Furthermore, **the mailer must clearly explain the reason(s) for the discrepancy and what corrective action has been taken by the mailer to prevent recurrence in the future. For “Other Refund Requests”, all applicable documentation must be provided within 5 days in order to review the refund request. All written refund requests must contain the following:**

- **Date the system or procedural failure occurred**
- **The number of pieces affected**
- **Package Identification Code (PIC) affected**
- **The amount of overpayment of postage**
- **Mailer’s tax identification number (TIN) or complete W9 form**

**If applicable, the following information may be needed to support the refund request:**

- **Any Electronic File Number (EFN) affected**
- **Any other pertinent information to support the request**



# Appendix



## Unmanifested Fee

- Unmanifested Ratio will be calculated by mail class
  - Ratio subject to change, currently set at 4%
- Fees applied to the following competitive Mail Classes:
  - First Class
  - Priority Mail
  - Priority Mail Express
  - Parcel Select, Parcel Select Lightweight
  - Combined Mail Class (legacy barcode, invalid STC)
- Unmanifested Ratio for Combined Mail Class will be set at 100%
- Unmanifested Ratio for mail classes without any manifested pieces will be set at 100%