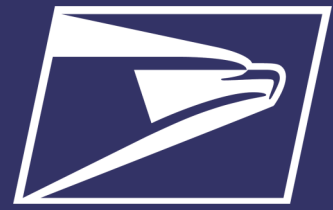


# Full-Service Annual Presort Fee Waivers

## Fact Sheet



### MAIL NOT CONSIDERED AS FULL-SERVICE ELIGIBLE

- First-Class Mail letters, postcards, and flats mailed at single-piece prices
- Saturation letters with simplified addressing
- All saturation flats
- Customized MarketMail (CMM)
- All parcels
- Non-Presorted Bound Printed Matter (BPM)

### ANNUAL PRESORT FEE

- Permit holders claiming presort prices are required to pay an annual presort fee for each permit
- First-Class Mail and Marketing Mail require separate annual presort fees
- The date the annual presort fee is due, or when it is initially established, is known as the anniversary date
- For waived fees, a new anniversary date will be established when the Full-Service Eligible percentage falls below 75%, or the Full-Service percentage falls below 90%

**Note:** The permit imprint application fee is still applicable.

### FIRST CLASS MAIL

Mail Service Providers (MSPs) or Mailing Agents may enter mail on behalf of their clients if their own annual presort fee is paid or waived, regardless of the permit used.

### USPS MARKETING MAIL

All permit holders or clients of MSPs must have the annual presort fee paid (or waived) if their permit is used in a mailing.

Permit Holders presenting Full-Service mailings are eligible for the waiver of annual presort mailing or destination entry presort fees when 75% or more of each permit's overall volume is Full-Service Eligible, **AND** 90% or more of each permit's Full-Service Eligible mail is submitted as Full-Service.

**Note:** The Full-Service Presort Fee Waiver is calculated on a nightly basis by PostalOne! to account for customers' multiple transactions.

### FULL-SERVICE ELIGIBLE PERCENTAGE

The Full-Service Eligible Percentage (FS Eligible %) calculation begins with the first postage statement submitted on or after the anniversary date.

**\*Note – The Full-Service Eligible Percentage calculation will not begin until after the first mailing presented following the PostalOne! update on January 12, 2020.**

$$\text{FS Eligible \%} = \frac{\text{Number of FS Eligible Pieces}}{\text{Total Number of All Pieces}}$$

**Must be 75% or higher for fee waiver.**

### FULL-SERVICE PERCENTAGE

The Full-Service Percentage (FS %) calculation begins with the first postage statement submitted on or after the anniversary date.

$$\text{FS \%} = \frac{\text{Number of FS Pieces}}{\text{Total Number of FS Eligible Presorted Pieces}}$$

**Must be 90% or higher for fee waiver.**

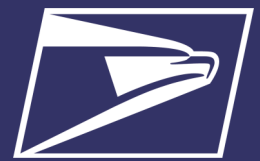
### PostalOne! Fee Status

- **Current:** when fee expiration date is in the future or the permit is involved in Seamless Acceptance mailings, regardless of Full-Service Eligible mailings - Fee payment not required; Accept mail
- **Pending:** when fee has expired and traditional permit has not reached required Full-Service eligibility (no mailings have been presented since anniversary date) - Fee payment not required; Accept mail
- **Waived:** when permit is involved in Seamless Acceptance mailings or traditional permit has reached 75% Full-Service Eligible for all mailings and 90% Full-Service for Full-Service Eligible mailings - Fee payment not required; Accept mail
- **Due:** when fee has expired and Full-Service Fee Waiver is not applicable - **Fee payment required;** Fee must be paid prior to the release of the mail

Full Service %	Full Service Eligible %	Status of Fee	Transaction ID
0	0	Pending	2015159
0	N/A	Current	2004097
100	0	Current	2019367
Full Service %	Full Service Eligible %	Status of Fee	Transaction ID
0	N/A	Current	2004097
100	0	Due	2015217
Full Service %	Full Service Eligible %	Status of Fee	Transaction ID
100	0	Due	
0	N/A	Current	
98.01	100	Waived (Full Service threshold)	

# Full-Service Annual Presort Fee Waivers

## Fact Sheet



### ANNUAL PRESORT FEES ARE DEFERRED WHEN A PERMIT IS USED IN A SEAMLESS MAILING

### BCG BALANCE & FEES MODULE

Permit holders and BMEU acceptance employees can access the following information via the Business Customer Gateway (BCG) or *PostalOne!*:

- Full-Service percentage by mail class and permit
- Full-Service percentage details for all permits and details per statement
- Permit Holders can access Full-Service details from prior years from BCG.

### WHERE CAN YOU VIEW THE FULL-SERVICE PERCENTAGE?

- Internal/External Balance & Fees page
- Internal Permit Number Column on Dashboard
- Internal Customer Assistance lookup screen

**Note:** Mailer Scorecard Full-Service percentages are not used for fee waiver calculations

## PRESORT FEE WAIVER EXAMPLES

### Fee Waiver Eligibility Requirements



At least **75%** of total volume must be eligible for Full-Service



At least **90%** of Full-Service eligible volume must be submitted as Full-Service in each mailing

Mailer meets requirements for Full-Service Fee Waiver



**Example:** Mailer has a **Total Volume = 500,000** of which they have **Full-Service Volume = 360,000** and **Full-Service Eligible = 400,000**

$$\frac{\text{Full-Service Eligible Volume } 400,000}{\text{Total Volume} = 500,000} = 80\% \text{ of Total Volume Is Full-Service eligible}$$

$$\frac{\text{Full-Service Volume } 360,000}{\text{Full-Service Eligible Volume} = 400,000} = 90\% \text{ of Full-Service Eligible Volume submitted as Full-Service overall}$$

**Example 1.** Total volume is 500,000 pieces, of which 400,000 pieces are Full-Service eligible. Two calculations are performed to determine whether the mailer meets the Fee Waiver eligibility requirements:

1. Divide the Full-Service Eligible volume by the total volume. Using the example divide 400,000 by 500,000 to get 0.8. 80% of this mailer's total mail volume is Full-Service Eligible which exceeds the first Fee Waiver requirement (FS Eligible must be 75% or greater).
2. Next, divide the mailer's Full-Service volume by their Full-Service Eligible volume. Per the example, divide 360,000 by 400,000 to get .90. 90% of this mailer's Full-Service eligible volume is submitted as Full-Service and meets the second Fee Waiver requirement (of the Eligible FS, must be 90% or more Full Service)

Because the mailer in this example meets both Fee Waiver eligibility requirements their annual Presort Fee will be waived for that mail class.

### Fee Waiver Eligibility Requirements



At least **75%** of total volume must be eligible for Full-Service



At least **90%** of Full-Service eligible volume must be submitted as Full-Service in each mailing

Mailer does not meet requirements for Full-Service Fee Waiver



**Example:** Mailer has a **Total Volume = 500,000** of which they have **Full-Service Volume = 350,000** and **Full-Service Eligible = 400,000**

$$\frac{\text{Full-Service Eligible Volume } 400,000}{\text{Total Volume} = 500,000} = 80\% \text{ of Total Volume Is Full-Service eligible}$$

$$\frac{\text{Full-Service Volume } 350,000}{\text{Full-Service Eligible Volume} = 400,000} = 87.5\% \text{ of Full-Service Eligible Volume submitted as Full-Service overall}$$

**Example 2.** Total volume is 500,000 pieces, of which 400,000 pieces are Full-Service eligible. Two calculations must be performed to determine whether the mailer meets the Fee Waiver eligibility requirements.

1. Divide the Full-Service Eligible volume by the total volume. Using the example divide 400,000 by 500,000 to get 0.8. 80% of this mailer's total mail volume is Full-Service Eligible which exceeds the first Fee Waiver requirement (FS Eligible must be 75% or greater).
2. Next, divide the mailer's Full-Service volume by their Full-Service Eligible volume. Per the example, divide 350,000 by 400,000 to get .875. 87.5% of this mailer's Full-Service Eligible volume is submitted as Full-Service and does not meet the second fee waiver requirement (of the Eligible FS, must be 90% or more Full Service).

Because the mailer in this example does not meet both Fee Waiver Eligibility requirements their annual Presort Fee for that mail class will not be waived.