

Mailers' Technical Advisory Committee (MTAC)

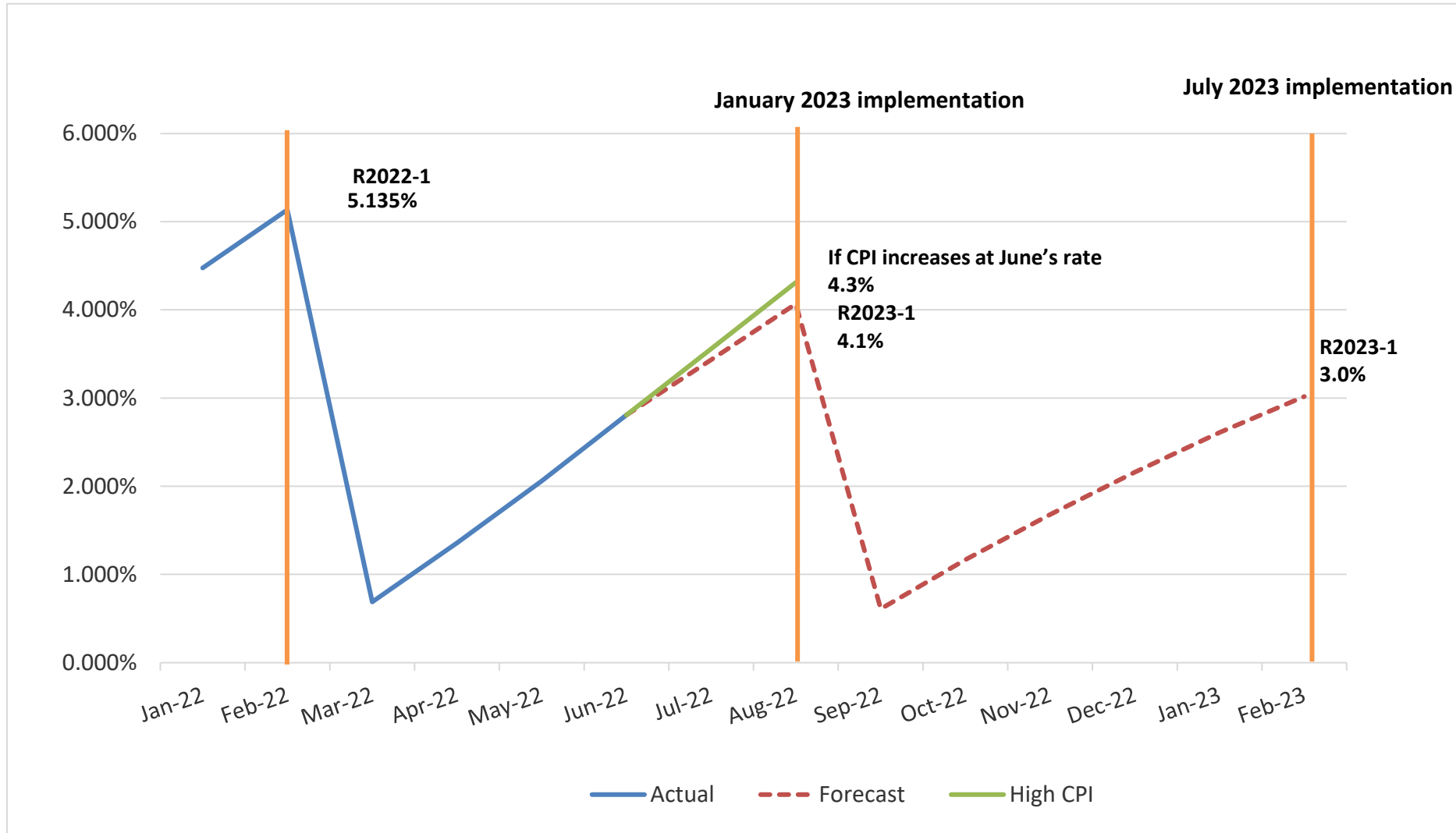
**Focus Group Sessions
Entry, Payment, Product**

July 27, 2022

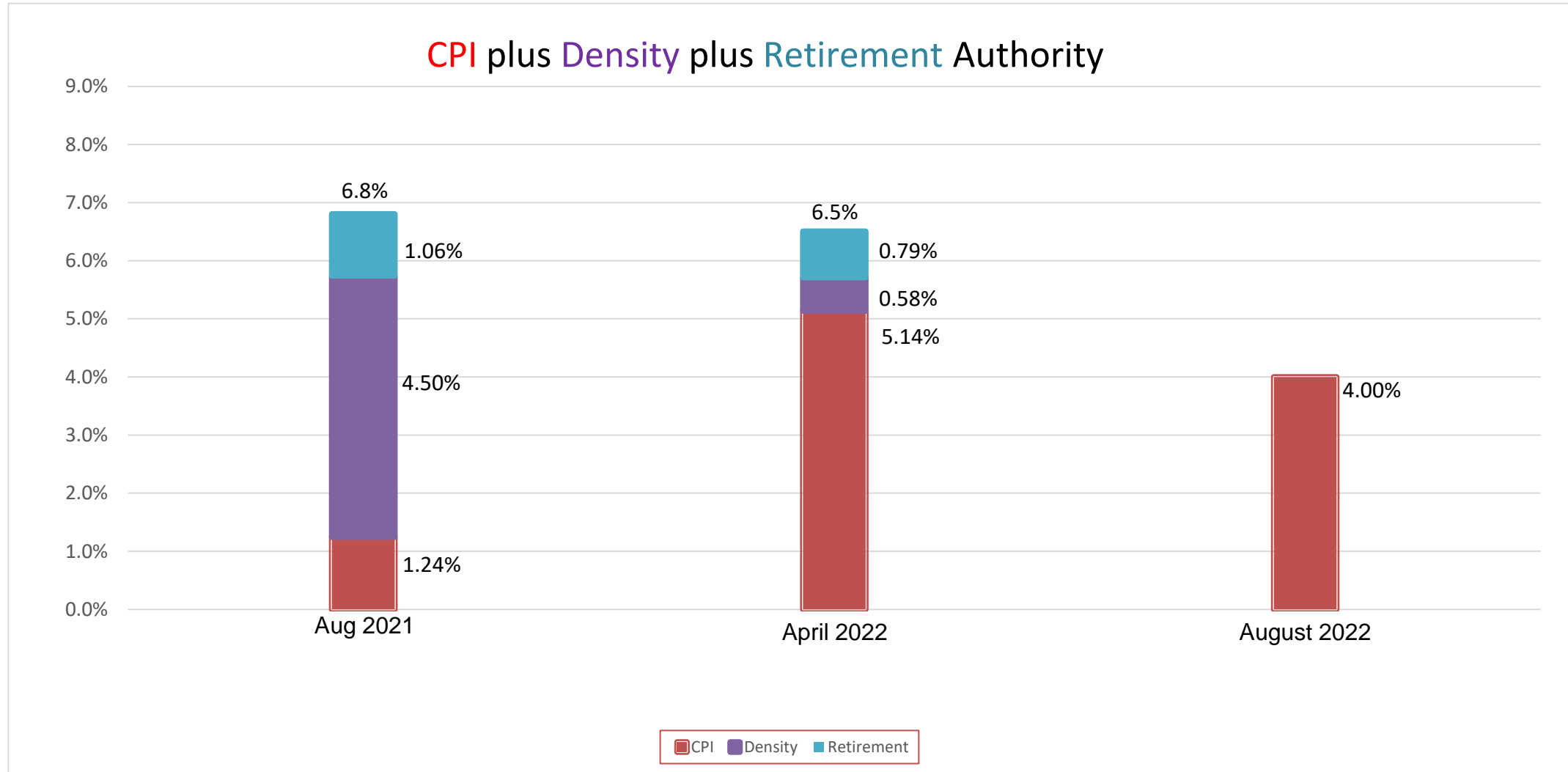
Agenda

1. Pricing Update
2. Mailer Scorecard Mailpiece Images
3. Linking Permits or PO Boxes to EPS
4. Promotions Reporting
5. Permit Balance API
6. Direct Container Discount Charge
7. HAZMAT Update
8. Shape Based Tracks

CAP for August 2022 - January & July 2023 Implementation



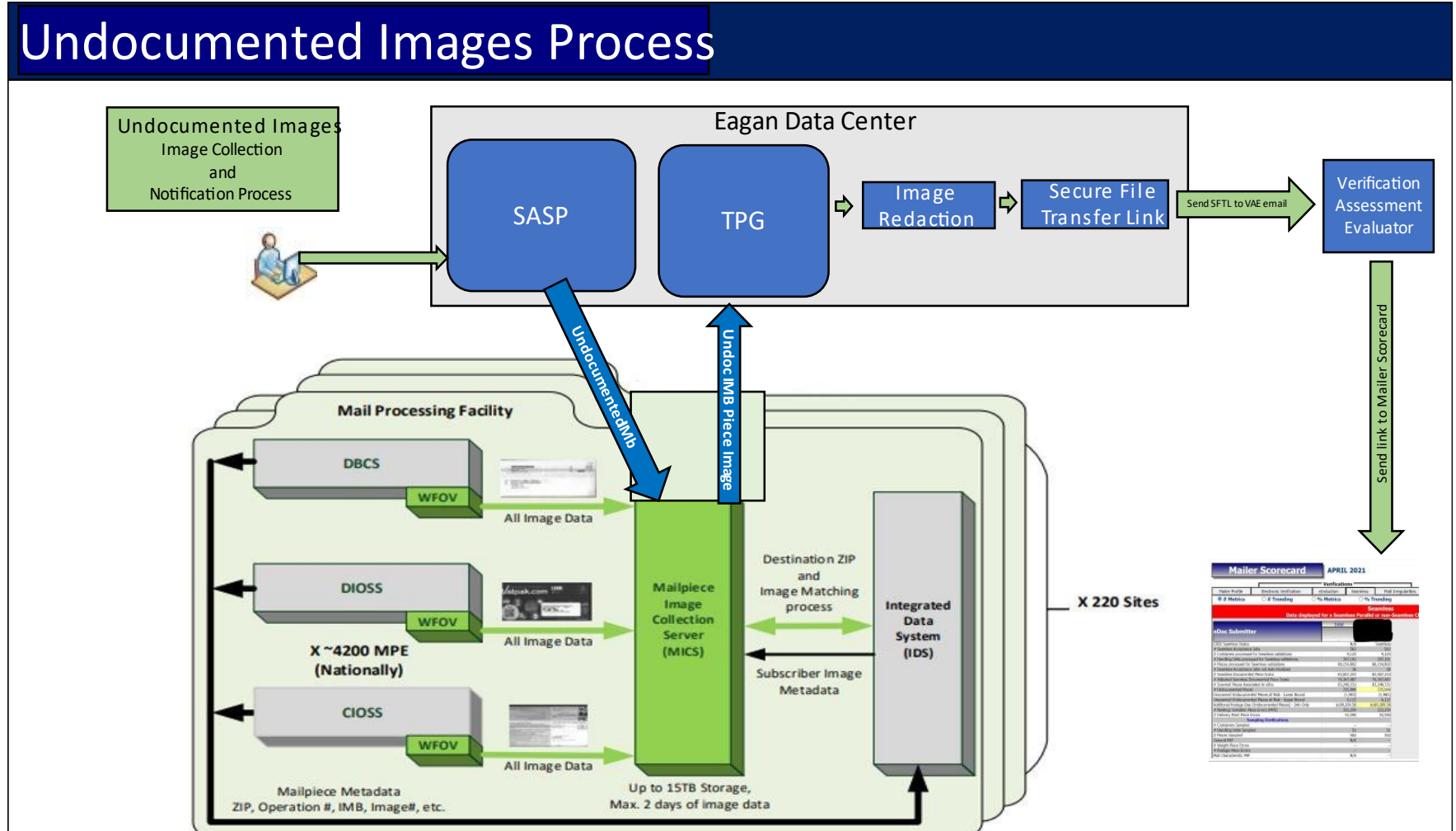
CPI and Price Cap Space Available for January 2023 Price Increases



Mailer Scorecard Mailpiece Images Update


Image Architecture

- Prototype on Schedule for 9/30/22 Internal Testing
- Currently Testing Image Redaction



Mailer Scorecard Mailpiece Images Update

Images Timeline

	Task Mode	Task Name
✓	✦	Learn about ELFS and large file transfers for mailer retrieval
✓	✦	Meet with Informed Delivery to gain knowledge and understanding of Mailpiece ID
✓	✦	Engage Engineering on image project in progress
✓	✦	Gather cross functional input
✓	✦	Develop timeline and milestones
✓	✦	Process to Identify Images for Retention
	✦	Storage options
	✦	How many images allowed per requested mailer CRID
	✦	Develop process to redact PII automatically
✓	✦	Review overall plan with Director and VP
	✦	Image Retrieval Access - Internal
	✦	Image Retrieval Access - External
	✦	Create BCG access to ELFS
	✦	Create disclaimer (legal) on image retrieval and review process
	✦	Develop collateral for Industry and Internal Stakeholders
	✦	Provide Legal, Privacy and USPIS review prior to "Go Live"

Linking Permits or PO Boxes to Enterprise Payment System (EPS)

Current:

- Accounts that have been suspended due to negative balance cannot be reopened without going to the office where the PO Box is held.

Potential solutions:

- Exploring option to allow a suspended account that is less than 2 days with negative balance to be reactivated by the customer with a deposit that clears the negative balance.
- Exploring EPOBOL expired PO Box payments to also allow 3 days for customer to reactivate with payment. Any period longer than 3 days would need a system DR (same as current) to correct once mailer clears the balance.

Options for Viewing Promotions Data:

Business Customer Gateway (BCG)

- Incentive Programs

PostalOne!

- Estimated Statements (EST) on Dashboard

Mail.dat Client

- Receipt Files

USPS Promotions Reporting

Log in to BCG and choose Mailing Services > Incentive Programs > “Go to Service”

BUSINESS CUSTOMER GATEWAY Home Hello Duffy!

Mailing Services Shipping Services Additional Services Alerts Pending Requests Manage Account USPS.com Help

Welcome, Duffy James

ABC (94600249), 3170 CREEKWOOD DR, RENO, NV 89502-7725

Next Permit Fee: No Permit Fees [Balance and Fees](#)

Account Overview

Access to the Enterprise Payment System is required for this information. Request access to the Enterprise Payment System.

Mailer Scorecard

eDoc Submitter Mail Preparer Mail Owner

July 2022

You either do not participate in this program, or we have yet to receive data for this CRID.

Favorite Services [Edit](#)

- Audit Mailing Activity >
- Dashboard >
- Mailer ID >
- Mailing Reports >
- Manage Permits >
- Postal Wizard >
- Verification Assessment >

[+ Incentive Programs](#) [more info >](#) [Go to Service](#)

USPS Promotions Reporting - BCG

Landing page for Promotions signup and reporting

Choose Reports

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Welcome POS2757 [Manage Electronic Samples](#)

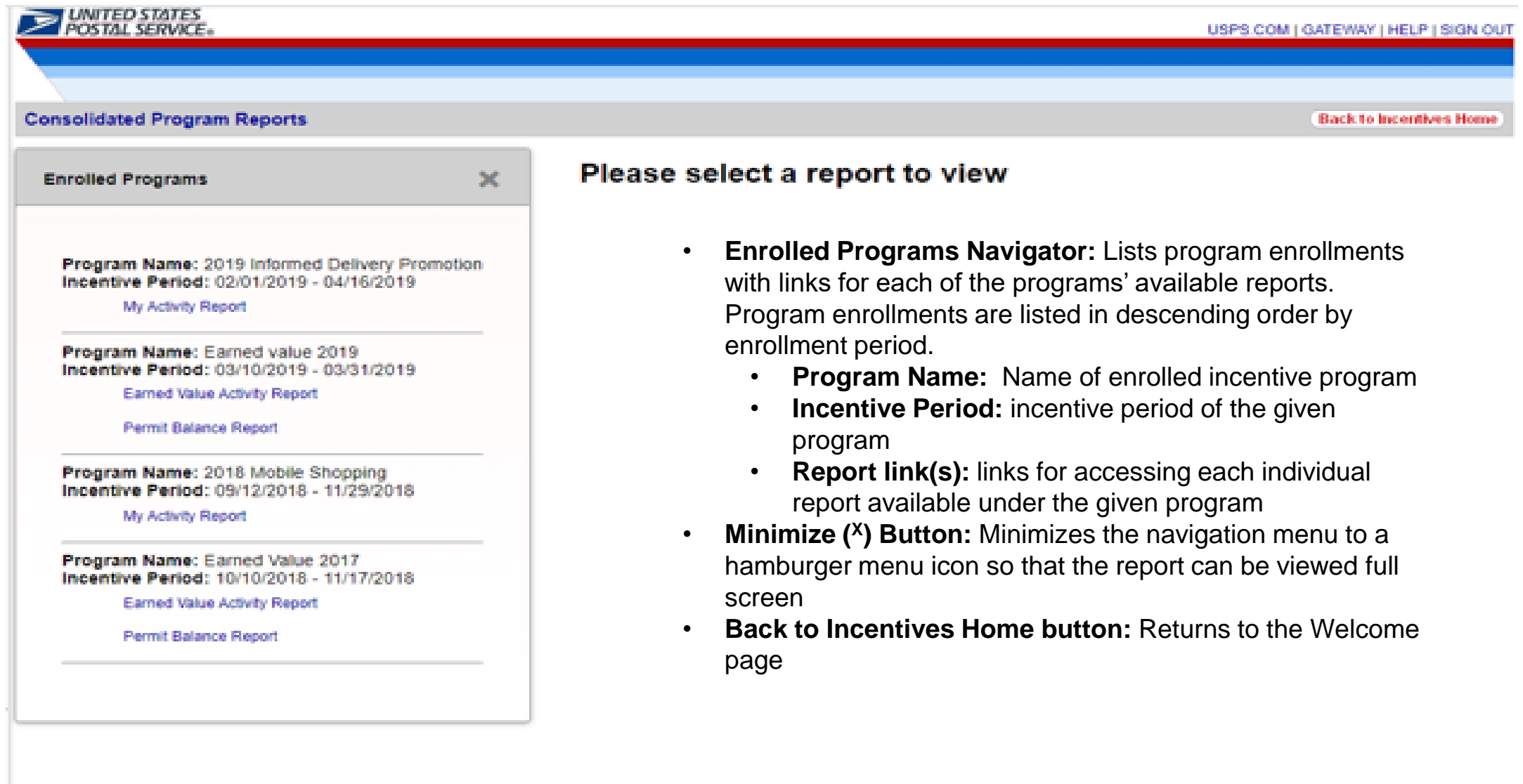
Click [here](#) to view or change your business location. Programs for which you are enrolled in or eligible to enroll in will be displayed upon selecting a location.

Your current location CRID is : 2919260
TAYLOR COMMUNICATIONS SCS
1 HARDMAN DR
BLOOMINGTON

Click the incentive name to get more information or to begin enrollment.

- 2018 Mobile Shopping**
The promotion is aimed at businesses and mailers offering products for sale during the 2017 holiday shopping season. As mobile technology continues to evolve, mail has the potential to offer greater value. To demonstrate that direct mail continues to be a relevant part of the marketing mix, the Postal Service is encouraging customers to adopt and invest in technologies that enhance how consumers interact and engage with mail. The 2017 Mobile Shopping promotion encourages mailers to integrate mobile technology with direct mail to create a convenient method for customers to do their shopping.
- 2018 Threshold for 2019 Earned Value program**
USPS did not offer any Mailing Promotions in 2018. This 2018 Threshold for 2019 Earned Value program has been made available for users to view their 2018 scan data that will be used to determine the threshold for the 2019 Earned Value Promotion.
- 2019 Emerging & Advanced Technology**
NOTE: The mailpiece must use at least one form of the approved emerging or advanced technologies referenced above in order to receive the promotional discount.
- 2019 Informed Delivery Promotion**
The Informed Delivery® Promotion offers a 2% discount on postage for business mailers who sign up for Informed Delivery and launch an Informed Delivery Interactive campaign associated with mailpieces entered through a BMEU.
- 2019 Mobile Shopping**
The promotion is aimed at businesses and mailers offering products for sale during the 2017 holiday shopping season. As mobile technology continues to evolve, mail has the potential to offer greater value. To demonstrate that direct mail continues to be a relevant part of the marketing mix, the Postal Service is

USPS Promotions Reporting - BCG



The screenshot displays the USPS Promotions Reporting interface. At the top left is the USPS logo and "UNITED STATES POSTAL SERVICE". At the top right are links for "USPS.COM | GATEWAY | HELP | SIGN OUT". Below the header is a navigation bar with "Consolidated Program Reports" and a "Back to Incentives Home" button. The main content area is titled "Enrolled Programs" with a minimize (X) button. It lists four programs with their names, incentive periods, and available reports:

- Program Name:** 2019 Informed Delivery Promotion
Incentive Period: 02/01/2019 - 04/16/2019
[My Activity Report](#)
- Program Name:** Earned value 2019
Incentive Period: 03/10/2019 - 03/31/2019
[Earned Value Activity Report](#)
[Permit Balance Report](#)
- Program Name:** 2018 Mobile Shopping
Incentive Period: 09/12/2018 - 11/29/2018
[My Activity Report](#)
- Program Name:** Earned Value 2017
Incentive Period: 10/10/2018 - 11/17/2018
[Earned Value Activity Report](#)
[Permit Balance Report](#)

Please select a report to view

- **Enrolled Programs Navigator:** Lists program enrollments with links for each of the programs' available reports. Program enrollments are listed in descending order by enrollment period.
 - **Program Name:** Name of enrolled incentive program
 - **Incentive Period:** incentive period of the given program
 - **Report link(s):** links for accessing each individual report available under the given program
- **Minimize (X) Button:** Minimizes the navigation menu to a hamburger menu icon so that the report can be viewed full screen
- **Back to Incentives Home button:** Returns to the Welcome page

USPS Promotions Reporting - BCG

☰ Icon: When clicked, displays the **Enrolled Programs** Navigator as an overlay on top of the report. The currently selected report will be highlighted in the Navigator



UNITED STATES POSTAL SERVICE

Consolidated Program Reports

Enrolled Programs ✕

Program Name: 2019 Informed Delivery Promotion
Incentive Period: 02/01/2019 - 04/16/2019
[My Activity Report](#)

Program Name: Earned value 2019
Incentive Period: 03/10/2019 - 03/31/2019
Earned Value Activity Report
[Permit Balance Report](#)

Program Name: 2018 Mobile Shopping
Incentive Period: 09/12/2018 - 11/29/2018
[My Activity Report](#)

Program Name: Earned Value 2017
Incentive Period: 10/10/2018 - 11/17/2018
[Earned Value Activity Report](#)
[Permit Balance Report](#)

Earned Value Report
displays your mailings and accrued award amounts. The award amount is not finalized until the end of the award period.

Permit Type	Finance Number
PC	056894
PC	111111

Earned Value Summary

Total Volume CRM	Total Volume BRM
1,461	
1,461	
1	
1,462	

Earned Value Credit Summary by CRID

CRID	Company	SPLY Total Count By CRID	Promotion Period Total Count By CRID
22236761	MrsFunk	3,745	2,210

Earned Value Detail

CRID	Company	MID	Previous Total Count By MID	Current Total Count By MID	MAR 2019			Total CRM Pieces	Total BRM Pieces	Total Share Mail Pieces	Total CRM Piece Adjust	Total BRM Piece Adjust	Total Share Mail Piece Adjust	Net CRM Pieces	Net BRM Pieces	Net Share Mail Pieces	CRM Total Credit Amount	BRM Total Credit Amount	Share Mail Total Credit Amount
					CRM Pieces	BRM Pieces	Share Mail Pieces												
22236761	MrsFunk	901050251	1,896	673	660	0	0	660	0	0	3	0	10	663	0	10	\$13.26	\$0.00	\$0.20
22236761	MrsFunk	901051383	179	26	0	20	0	0	20	0	-2	8	0	-2	28	0	-\$0.04	\$0.56	\$0.00
22236761	MrsFunk	901125728	1,640	1,461	796	0	0	796	0	0	0	665	0	796	665	0	\$15.92	\$13.30	\$0.00
22236761	MrsFunk	901416611	30	50	5	45	0	5	45	0	0	0	0	5	45	0	\$0.10	\$0.90	\$0.00

[Download to Excel](#)

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Consolidated Program Reports [Back to Incentives Home](#)

☰ Program Name: Earned value 2019 Incentive Period: 03/10/2019 - 03/31/2019

Earned Value Report
This report displays your mailings and accrued award amounts. The award amount is not finalized until the end of the award period.

Permit Number	Permit Type	Finance Number	Percent Allocated	Amount
24	PC	056894	95%	\$41.99
24	PC	111111	5%	\$2.21
Total Available Credit				\$44.20

Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Total Volume Share Mail	Award Amount
03-29-2019	03-31-2019	1,461	65	0	\$30.52
Subtotal		1,461	65	0	\$30.52
Adjustment		1	673	10	\$13.68
Grand Total		1,462	738	10	\$44.20
Other Credit *				\$0.00	
Total Available Credit				\$44.20	

* Credit belongs to other users

Earned Value Credit Summary by CRID

CRID	Company	SPLY Total Count By CRID	Promotion Period Total Count By CRID	Growth % By CRID	Credit Per Piece	Total Credit By CRID
22236761	MrsFunk	3,745	2,210	-40.99	\$0.0200	\$44.20

Earned Value Detail

CRID	Company	MID	Previous Total Count By MID	Current Total Count By MID	MAR 2019			Total CRM Pieces	Total BRM Pieces	Total Share Mail Pieces	Total CRM Piece Adjust	Total BRM Piece Adjust	Total Share Mail Piece Adjust	Net CRM Pieces	Net BRM Pieces	Net Share Mail Pieces	CRM Total Credit Amount	BRM Total Credit Amount	Share Mail Total Credit Amount
					CRM Pieces	BRM Pieces	Share Mail Pieces												
22236761	MrsFunk	901050251	1,896	673	660	0	0	660	0	0	3	0	10	663	0	10	\$13.26	\$0.00	\$0.20
22236761	MrsFunk	901051383	179	26	0	20	0	0	20	0	-2	8	0	-2	28	0	-\$0.04	\$0.56	\$0.00
22236761	MrsFunk	901125728	1,640	1,461	796	0	0	796	0	0	0	665	0	796	665	0	\$15.92	\$13.30	\$0.00
22236761	MrsFunk	901416611	30	50	5	45	0	5	45	0	0	0	0	5	45	0	\$0.10	\$0.90	\$0.00

[Download to Excel](#)

Sample Consolidated Report

USPS Promotions Reporting - BCG

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Welcome POS2757 [Manage Electronic Samples](#)

Click **here** to view or change your business location. Programs for which you are enrolled in or eligible to enroll in will be displayed upon selecting a location.

Your current location CRID is : 2919260
TAYLOR COMMUNICATIONS SCS
1 HARDMAN DR
BLOOMINGTON

Click the incentive name to get more information or to begin enrollment.

[2018 Mobile Shopping](#)

The promotion is aimed at businesses and mailers offering products for sale

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[Back to Enrollment Home](#)

Choose Location

Your available locations are displayed below. To change locations, select the radio button for the location and click the Change Location button.

Programs for which you are enrolled in or eligible to enroll in will be displayed upon selecting a location.

Your current home business location CRID: 94771297

	CRID	Company	Address
<input checked="" type="radio"/>	94771297	RYM	25138 BEACH PL CHANTILLY, VA 20152-4130
<input type="radio"/>	94822540	PINGOO TINGOO	12005 BERRY FARM CT HERNDON, VA 20171-1627

[Change Location](#)

To change view to different CRID click “Here” (as shown in screenshot) and a list of your linked Business locations will display

PostalOne! Dashboard Promotion Validation in Estimated Postage Status

Informed Delivery Promotion Validation in Estimated Postage Status

JOB ID	Mailing Group ID	Product Statement ID	Job Order Type	Validation Type	Validation Method	EST Status	Mail's Mailing Date	Class Code	CLASSIFICATION	Quantity	Account Number	Product Code	Mail Class	Price	Postage	Statement	EST
1234567	8765432	3210987	Standard	Standard	Standard	EST	2023-10-25	01	010000	1000	1234567	010000	01	\$1.00	\$1,000.00	EST	EST

Category	Description	Amount
Subtotal Postage		\$ 1,065.00
FS Discount		\$ 0.0000
Discount Total		\$ 0.0000
Fee Total		\$ 0.0000
Postage		\$ 1,065.00
Total Full Service Discount From All Parts		-\$ 18,390.00
Informed Delivery Incentive		-\$ 81,484.00
Total Postage From All Parts		\$ 1,956,686.00
Total From Attached Form 3540-S		N/A
Total Postage		\$ 1,956.69



Statement Status
EST

Estimated Postage

Customer Reference ID.:
Move Update Method:
Political Mail: NO
Mailpiece is a product sample: NO
Incentive/Discount Claimed: YES
Mail Arrival Date and Time: N/A
Container Grouping ID:
Copal Mailing Type:
SSF TID Number:

Subtotal Postage	FS Discount	Discount Total	Fee Total	Postage
\$ 1,065.00	\$ 0.0000	\$ 0.0000	\$ 0.0000	\$ 1,065.00
Total Full Service Discount From All Parts: -\$ 18,390.00				Part B Total (Add lines B1-B27)
	Informed Delivery Incentive	-\$ 81,484.00		\$ 1,956,686.00
		Total Postage From All Parts		N/A
		Total From Attached Form 3540-S		\$ 1,956.69
		Total Postage		
		Total Incentive/Discount Claimed: \$, 99,874.00		

PostalOne! will add a feature to provide ID promotion status, when postage statements are in Estimated Postage status. This feature will allow for the mailers to address any issues with the promotion in advance of when the mailing is to take place.

MDR Client (Mail.dat) Promotions Verification via Receipt Files

USPS PostalOne! MDR Client (Mail.dat) Promotions Verification via Receipt Files

On-Screen

MDR Client User Interface, Client-side, Server-side

Validation
Log

Txt file, Client-side

Receipts

ASCII (Client-side), XML (Client-side), Enhanced XML (Client-side & Server-side), Batch-mode processing

MDR Client (Mail.dat) Promotions Verification via Receipt Files

Receipt File Setup

Settings

General | **Batch Configuration** | Receipt Files * Required

Username/Password

Password is case sensitive.

Username * Password *

Upload

Run Time minutes Sleep Time minutes

Batch File Locations

Jobs Repository * Browse...

Rejected Files * Browse...

Failed Jobs * Browse...

Successful Jobs * Browse...

Cancel OK

Settings

General | Batch Configuration | **Receipt Files** * Required

Receipt Files

Directory does not exist.

Receipt Event Generation Enable Disable

Receipts Repository Browse...

Receipt Format Enhanced-XML XML ASCII Delimiter Space Tab Other:

Postage Statement Filter Submission Billable

Receipt File Name

Receipt Poll Run Time minutes Sleep Time minutes

Additional Usernames for Receipt Download

Username Password

Add Delete Modify

Cancel OK

LETTERS

Workgroup 195 Update (Duffy)

Certified Mail bulk dispute

Business Reply Mail/Remittance update

Work Group 195 Sunset → New Task Team 36

- **New!** Task Team 36 – Kickoff meeting scheduled - 8/4/2022
- Postage Statements via IV - Project Plan Timeline – TBD in TT36
- WG 195 sunset – Resolution Statement on PostalPro
 - Remaining Action Items transition to TT36 (partial list to right)

Issue Origin	Category	Issue Summary	Recommendation	Priority	Status
Pre-WG 195 Industry-26	Correction needed	IV File has one less copy in the piece section versus the Pound section. Problem appears to be due to the fact that in cell C2 there were no addressed pieces but 1 copy. Original Issue 30: Section C not included in the CM file when the mailing is 100% Firm Bundles.	Move issue to UG 11	High	Needs USPS Follow-up
Pre-WG 195 Industry-44	Feature Request	EPS data delegation at the Permit level in addition to the CRID level. (Same as Mail Tracking today)	Postage Data Delegation moving to a new MTAC Task Team.	High	New Task Team
Pre-WG 195 Industry-45	Feature Request	Add EPS-IV data delegation to the BCG as with other services instead of using the form	Postage Data Delegation moving to a new MTAC Task Team.	High	New Task Team
Pre-WG 195 Industry-47	Feature Request	Getting raw PostalOne data through IV w/o having to pass through EPS first.	Postage Data Delegation moving to a new MTAC Task Team.	High	New Task Team
Pre-WG 195 Industry-48	Feature Request	Ability to perform EPS one-time queries in IV	Move issue to UG 11	High	Needs USPS Follow-up
UG11 UnScheduled-12	Feature Request	CR 1639 - Add refund reason for refund transactions	Monitor until completed in UG 11	High	Prioritized for 2nd Half of FY22 (Apr Sept 2022)
WG 195-01	Correction needed	City/State of permit blank for ADJ transaction and permit fees	Move issue to UG 11	High	Needs USPS Follow-up
78	Feature Request	Ability to renew for just six months through ePOBOL	Monitor until completed in UG 11	High	To Be Scheduled
83	Feature Request	Need the ability to filter by Outbound and Return Packages in IV in Price file type reports . Current work-around is to set up different CRIDs for each.	Move issue to UG 11	High	Needs USPS Follow-up
85	Correction needed	HV Auto renewal went through late by three days. Therefore BRM that came through during those three days paid the higher fee. There is a three-day grace period which should have prevented the higher rates.	Move issue to UG 11	High	Needs USPS Follow-up

PACKAGE SERVICES

Package TEM environment available end of July

USPS Ship TEM

USPS Ship is planning to have a TEM environment for shipper testing in early August 2022

- This new test environment will allow customers to submit manifest files and see warnings, errors and manifest pricing
- Shippers will submit test manifests in the same manner they do in eVS TEM
- Reports will be available to view manifest pricing as well as errors and warnings
- **Enhancement from eVS:** Shippers will receive their contract pricing in USPS Ship TEM

FLATS

Pending Periodicals Update

Pending Periodicals – EPS Issue

The current Enterprise Payment System (EPS) design structure does not accommodate Pending Periodicals (PP) Reserve Fund which results in incorrect Postage Collection and Refunds

When an EPS funded PP Statement is finalized, *PostalOne!* sends a batch transaction to EPS:

- 1 for the Periodicals Rate
- 1 for the difference between the Periodicals Rate and the FCM/MKT/NP as appropriate
 - This is a “Reserve Fund” and not accessible to the mailer or USPS until disposition of PP application
- *PostalOne!* Keeps a record of the Reserve Fund

When EPS receives the batch transaction:

- EPS recognizes the first transaction and charges the customer’s EPS for the Periodicals Rate
- EPS ignores the second transaction (Reserve Fund)
 - Customer is not charged for the Reserve Fund
 - This means the USPS never collected the Reserve Fund and the mailer was only charged the Periodicals Rate

Pending Periodicals – EPS Issue

Because EPS ignores the “Reserve Fund,” it is causing Postage and Accounting issues **including:**

1. Mailer being undercharged for all PP mailings
 - If Pending Periodicals (PP) is approved, *PostalOne!* will refund the Reserve Fund (that mailer never paid)
 - Mailer will need to repay USPS this amount
 - If PP is disapproved *PostalOne!* will try to collect the Reserve Fund → EPS ignores the transaction
 - USPS must attempt to collect the unpaid Reserve Fund amount from the mailer
2. USPS – out of balance General Ledger
3. Inaccurate financial reporting
4. Additional work and tracking to ensure:
 - When a customer is approved:
 - USPS does not refund the reserve fund – never paid
 - When a customer is denied:
 - USPS collects the Reserve Fund postage (mailer not entitled to lower PE rate)

Pending Periodicals – Proposed EPS Solution

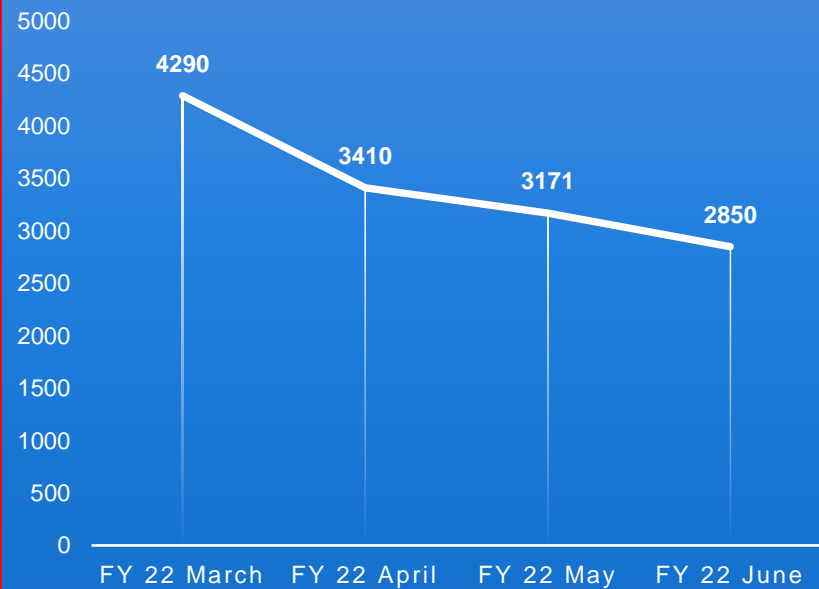
Proposed Solution for PP using EPS:

- *PostalOne!* will charge the mailer's EPS account the periodical postage amount in one transaction
- *PostalOne!* will continue to track the Reserve Fund until disposition of the application
 - The Pending Periodical account is not charged the "Reserve Fund" amount (**it is only tracked in *PostalOne!***)
- **If Periodical Authorization is approved**
 - A new PE permit is created in *PostalOne!*
 - *PostalOne!* will calculate which mailing qualified for Periodical rates based on the Periodicals Approval Effective Date
 - The Pending Periodical permit is cancelled
 - The new PE permit is created and linked to the mailer's EPS account
 - Available balance is transferred to the new PE Permit
 - The Reserve Fund is reduced to \$0 (based on Approval Effective Date)
- **If Periodical Authorization is denied**
 - A new PI permit is created
 - The PP permit record is set to DENIED
 - PI permit is linked to the mailer's EPS account
 - Available balance is transferred to PI
 - Reserve Fund is deducted from PI

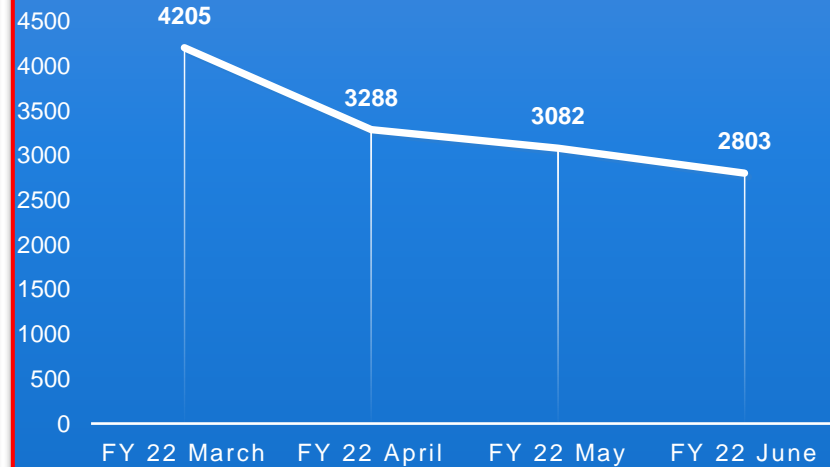
FY 22 MSSC Email Data

Email Queue Time is the total time between an email being sent to the helpdesk, and the time it was accepted (opened) by an agent.

TOTAL EMAILS RECEIVED BY MONTH



TOTAL EMAILS RECEIVED BY MONTH WITHOUT NON-BUSINESS HOURS

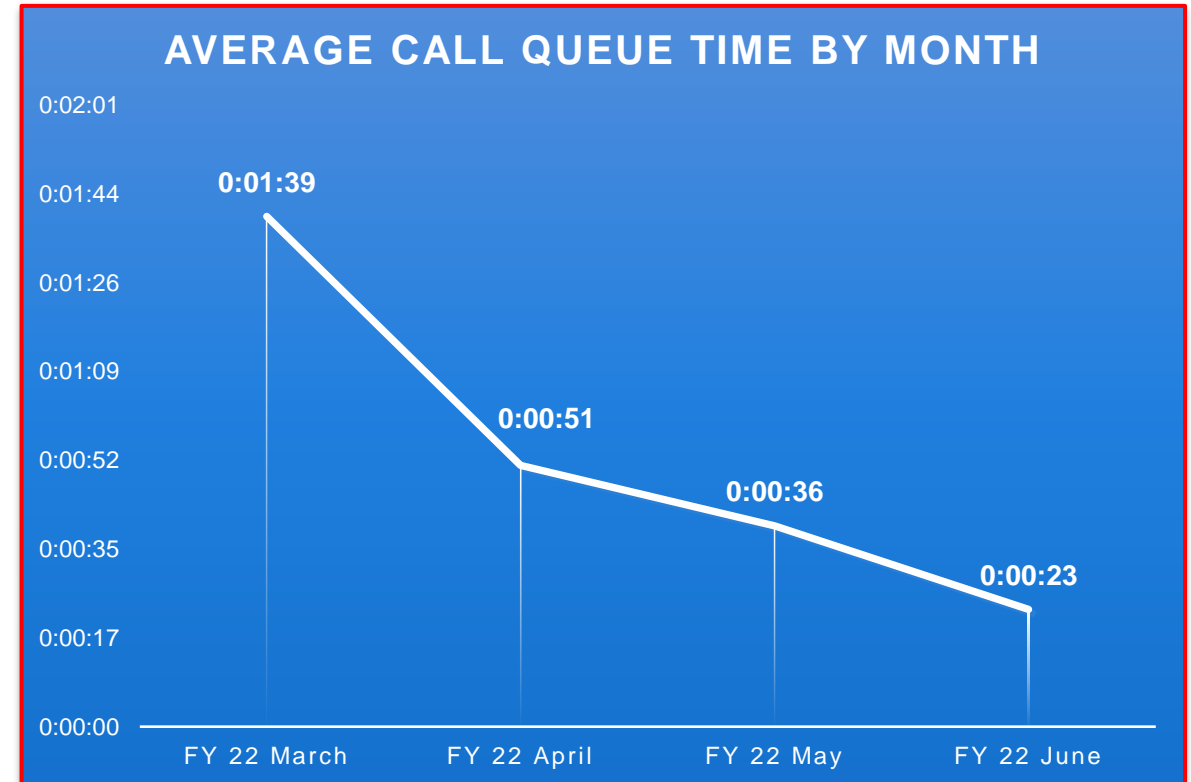
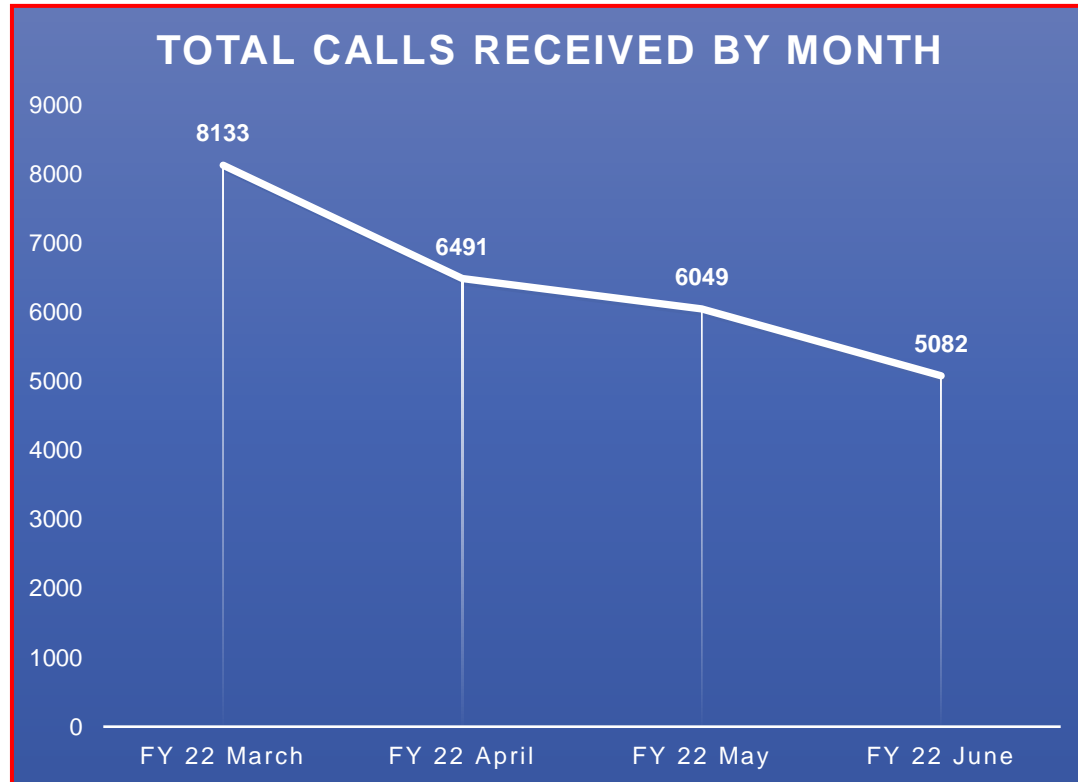


AVERAGE EMAIL QUEUE TIME BY MONTH



FY 22 MSSC Call Data

Call Queue Time is the total time between when the customer contacted us by phone, to the time the call was answered.



TED-C Process

Applying for Approval

Postal Service may require additional engineering tests for new designs.

Similar previously approved designs may bypass testing.

Samples **or** PDFs are required to be reviewed to obtain approval (submit request via email or mail)

[Trailing Edge Die-Cut \(TED-C\) Process for Eligibility at Automation Letter Prices | PostalPro \(usps.com\)](https://usps.com)



Email

1. Submit 3 images:

- front of the mailpiece,
- back of the mailpiece,
- mailpiece superimposed TED-C template

2. **Letter requesting approval** to mail TED-C letter-size mailpieces

Email to PCSC@usps.gov



Mail

1. Submit two (2) samples

2. **Letter requesting approval** to mail TED-C letter-size mailpieces

Mail to:

Director, Pricing & Classification Service Center

**90 Church Street Suite 3100
New York, NY 10007-2951**

- PB 7/28 will reference update to DMM
- DMM update will happen on 9/12- points to process on PostalPro