Mailers Technical Advisory Committee

Entry, Payment, Product Focus Area

Pre-MTAC Webinar

June 27, 2023

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Postage Due Account Set-Up: Wizard Format (Duffy)

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Postage Due Account setup - "Wizard format"

❑ USPS has continued to train employees on how to properly set up PD accounts. We have created a Standard Work Instruction and posted prominently on the BMA page. External users cannot set up PD accounts, only Internal USPS can do this.

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Certificate of Mailing

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Certificate of Mailing (COM) Extra Services Automated Solution
January 2024 Price Change

Scope: Certificate of mailing is **provided only for a mailing of identical pieces of First-Class Mail, Standard Mail, and Package Services**, using the total number of articles mailed and not used as an itemized list.

End State: Automation of Extra Services forms including **Bulk Certificate of Mailing** (Form 3606), **Certificate of Mailing** (Form 3665), **Firm Book for Accountable Mail** (Form 3877), and **Extra Service for More Than 3 Mail Pieces for Certificate and Accountable Mail** (Form 3817).

Anticipated Benefits

- Eliminate presenting physical forms to USPS
- Digitize ball-stamp verification as 'proof' that forms were presented and accepted by USPS on date of presentation
- Allow identification of COM volume through electronic documentation (EDOC)

- Enhance security of the COM data exchange
- Minimize risk of viewing personal data
- Increase visibility of Extra Services volume and revenue
- Reduce administrative time for mailer and postal clerks

Internal Improvements

April 2023 COM Survey Sent to MTAC Members

Future Flow Chart Design Draft

May 2023 Submitted January 2024 Price Change

Next Steps

January 2024 January 2024 Price Change

(Pending PRC Approval)

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Certified Mail

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Certified Mail Product Overview

Fee-based service that provides the sender with a mailing receipt and electronic verification that an article was delivered or that a delivery attempt was made with an option of a signature verification

Dispatched and handled in transit as ordinary mail

Certified Mail utilizes First-Class Mail, creating a Certified Mail piece can add anywhere from $4.15 to $10.80 on the cost depending on the services requested by the mailer and including original postage.

This product allows mailers to have high visibility and note delivery issues due to poor scanning of Certified Mail pieces. This is a high priority for the Product Management team and associated stakeholders for FY23.

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Sort Certified (CMD) in DPS 2nd Pass – Stand-Up Talk and SWI

Mandatory Stand-Up Talk
March 29, 2023
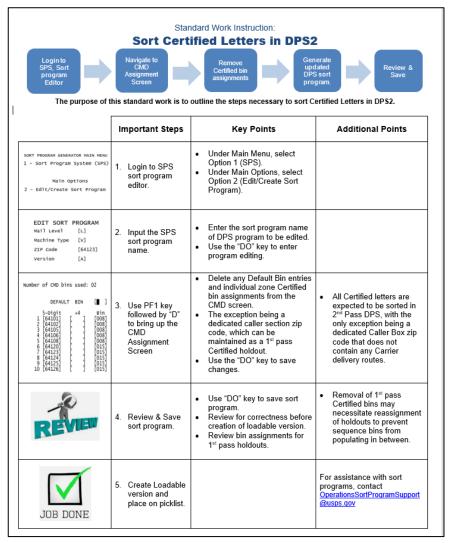
Standardization of Certified Mail in Mail Processing

Domestic Certified Mail® Service is a premium First-Class Mail® product. A fee based special service provides the sender with proof of acceptance with a mailing receipt and verification that an article was delivered or that a delivery attempt was made. For an additional fee, signature from the recipient can be provided either electronically or via a return receipt post card.

In FY22, Certified Mail generated $653M from 170M pieces. Currently, service performance for the premium Certified Mail® product is lower than regular First-Class Mail® pieces. Recent analysis indicates that special handling of Certified Mail® is the main driver for its poor scanning and delivery performance.

There has been no standardized process practiced for Certified Mail. Mail History Tracking System (MHTS) has the capability to identify Certified Mail in delivery point sequence. There is no longer a need to hold Certified Mail out in first pass. Certified Mail should now flow to second pass. The exception to this is any caller/reserve box mail being held out should continue to be held out. Please communicate the following and attached signed VP letter to all employees who handle this mail.

- Certified Mail® must be dispatched and handled in transit as First-Class Mail®. Refer to PUB 210 Section 23, located on the USPS Blue Page at: http://blue.usps.gov/cpim/ftp/pubs/pub210.pdf
- Certified Mail® accepted at the retail counter and retrieved from collection boxes must NOT be held out or separated from other letter or flat size First-Class Mail® pieces.
- Metered/Commercial Certified Mail® pieces that are presented at the post office containerized in trays are to remain in the trays. This will ensure the flow to the appropriate automated outgoing primary processing operation at the processing and distribution center.
- Certified Mail® received at mail processing facilities must NOT be separated from other letter or flat shaped First-Class Mail® pieces.
- Certified Mail must be processed on the same automated operations (including DPS second pass) as First-Class Mail® with the appropriate visibility systems active on the mail processing equipment. Certified Mail will no longer utilize a special hold out on automation sort programs.
- Certified Mail (letters and flats) destined for caller/reserve boxes at delivery units and plants must be separated from Delivery Point Sequence (DPS) and sorted to a separate letter tray or flat tub where the Caller Box zip code does not contain any delivery routes.

Thank you in advance for your hard work in fulfilling the Postal Service's commitment to the American public.
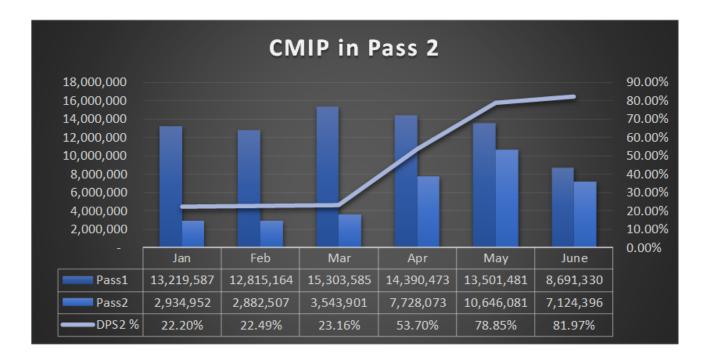

Standard Work Instruction:
Sort Certified Letters in DPS2

Login to SPS, Sort program Editor → Navigate to CMD Assignment Screen → Remove Certified bin assignments → Generate updated DPS sort program. → Review & Save

The purpose of this standard work is to outline the steps necessary to sort Certified Letters in DPS2.

	Important Steps	Key Points	Additional Points
SORT PROGRAM GENERATOR MAIN MENU 1 - Sort Program System (SPS) Main Options 2 - Edit/Create Sort Program	1. Login to SPS sort program editor.	• Under Main Menu, select Option 1 (SPS). • Under Main Options, select Option 2 (Edit/Create Sort Program).	
EDIT SORT PROGRAM Mail Level [L] Machine Type [V] ZIP Code [64123] Version [A]	2. Input the SPS sort program name.	• Enter the sort program name of DPS program to be edited. • Use the "DO" key to enter program editing.	
Number of CMD bins used: 02 DEFAULT BIN [▓] 5-Digit +4 Bin 1 [64101] [ ] [008] 2 [64102] [ ] [008] 3 [64105] [ ] [008] 4 [64106] [ ] [008] 5 [64108] [ ] [008] 6 [64120] [ ] [015] 7 [64123] [ ] [015] 8 [64124] [ ] [015] 9 [64125] [ ] [015] 10 [64126] [ ] [015]	3. Use PF1 key followed by "D" to bring up the CMD Assignment Screen	• Delete any Default Bin entries and individual zone Certified bin assignments from the CMD screen. • The exception being a dedicated caller section zip code, which can be maintained as a 1st pass Certified holdout. • Use the "DO" key to save changes.	• All Certified letters are expected to be sorted in 2nd Pass DPS, with the only exception being a dedicated Caller Box zip code that does not contain any Carrier delivery routes.
REVIEW	4. Review & Save sort program.	• Use "DO" key to save sort program. • Review for correctness before creation of loadable version. • Review bin assignments for 1st pass holdouts.	• Removal of 1st pass Certified bins may necessitate reassignment of holdouts to prevent sequence bins from populating in between.
JOB DONE	5. Create Loadable version and place on picklist.		For assistance with sort programs, contact OperationsSortProgramSupport@usps.gov

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Certified Mail Performance – Networks

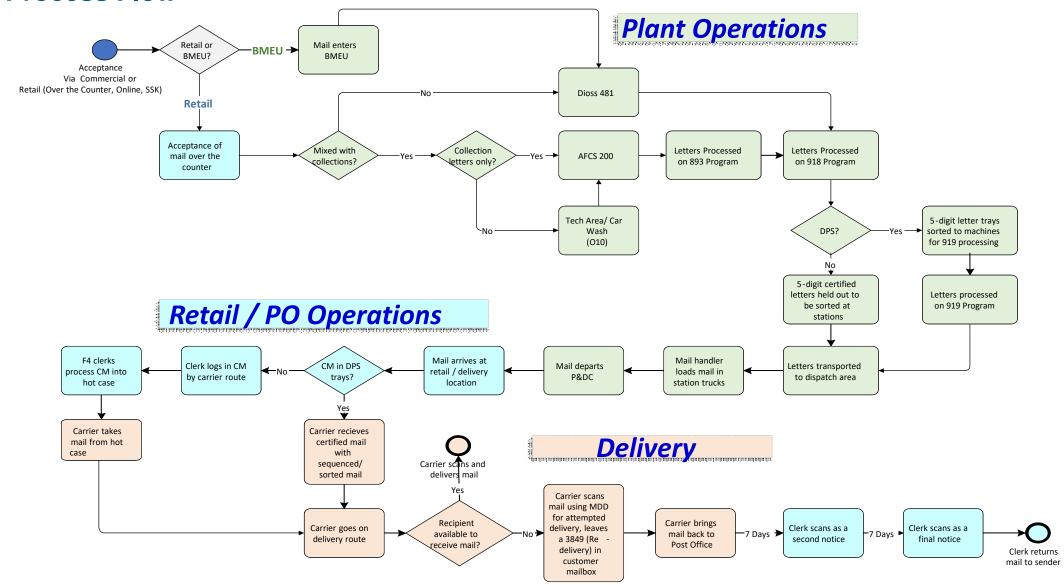## Networks - webEOR

Site	Pass1	Pass2	DPS2 %
Jan	13,219,587	2,934,952	22.20%
Feb	12,815,164	2,882,507	22.49%
Mar	15,303,585	3,543,901	23.16%
Apr	14,390,473	7,728,073	53.70%
May	13,501,481	10,646,081	78.85%
June	8,691,330	7,124,396	81.97%

Site	June Pass1	Pass2	DPS 2 %
⊞ All Sites compliant	8,691,330	7,124,396	81.97%
Grand Total	8,691,330	7,124,396	81.97%

CMIP in Pass 2

	Jan	Feb	Mar	Apr	May	June
Pass1	13,219,587	12,815,164	15,303,585	14,390,473	13,501,481	8,691,330
Pass2	2,934,952	2,882,507	3,543,901	7,728,073	10,646,081	7,124,396
DPS2 %	22.20%	22.49%	23.16%	53.70%	78.85%	81.97%

New Process Flow

Plant Operations

Retail / PO Operations

Delivery

Acceptance Via Commercial or Retail (Over the Counter, Online, SSK)

Retail or BMEU? → **BMEU** → Mail enters BMEU

Retail

Acceptance of mail over the counter

Mixed with collections? → Yes → Collection letters only? → Yes → AFCS 200

No → Dioss 481

Collection letters only? → No → Tech Area/ Car Wash (O10) → AFCS 200

AFCS 200 → Letters Processed on 893 Program → Letters Processed on 918 Program

Letters Processed on 918 Program → DPS? → Yes → 5-digit letter trays sorted to machines for 919 processing → Letters processed on 919 Program

DPS? → No → 5-digit certified letters held out to be sorted at stations

5-digit certified letters held out to be sorted at stations → Letters transported to dispatch area

Letters processed on 919 Program → Letters transported to dispatch area

Letters transported to dispatch area → Mail handler loads mail in station trucks → Mail departs P&DC → Mail arrives at retail / delivery location → CM in DPS trays?

CM in DPS trays? → No → Clerk logs in CM by carrier route → F4 clerks process CM into hot case → Carrier takes mail from hot case

CM in DPS trays? → Yes → Carrier recieves certified mail with sequenced/ sorted mail → Carrier goes on delivery route

Carrier takes mail from hot case → Carrier goes on delivery route

Carrier goes on delivery route → Recipient available to receive mail?

Recipient available to receive mail? → Yes → Carrier scans and delivers mail

Recipient available to receive mail? → No → Carrier scans mail using MDD for attempted delivery, leaves a 3849 (Re-delivery) in customer mailbox → Carrier brings mail back to Post Office → 7 Days → Clerk scans as a second notice → 7 Days → Clerk scans as a final notice → Clerk returns mail to sender

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Business Reply Mail

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Workgroup #196 – Sponsors, Co-Chairs and Objectives

USPS

Co-Chairs:

- Margaret Pepe – Director, Product Management, Product Solutions
- Tony Impronto – Director Post Office Operations, Retail and Post Office Operations

Kick off: June 26th

Meeting Bi-Weekly

36 participants

MTAC

Sponsor:

- Tom Glassman, Director, Services Programs, MS Programs, Ricoh-USA

Co-Chairs:

- Allan Kramer – Sr Systems Consultant, CDS Global
- Michael Patterson – Senior Program Analyst, Ricoh - USA

RETAIL OPS ———○——— PAYMENT ———○——— PRODUCT ———○

HOW DO WE DEFINE SUCCESS?

Business Reply Mail	Training	Review IMBA (Intelligent Mail Barcode Accounting)	BRM Product
• Measurement for Consistent Processing at Origin • Impact on End Processing	• Clerks on BRM Processing • Postage Due Accounts • Pending Transactions	• Issues and Education (Internal / External) • Increased Usage of IMBA	• Is there an opportunity to simplify the BRM product? • What would BRM forwarding look like?

Expected Date of Completion: Recommend 12 Months (June 2024)

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Reply Mail IMbA Promotion

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2023 Overview

The Reply Mail IMbA™ promotion encourages participants to streamline their Qualified Business Reply Mail™ (QBRM™) pieces utilizing Intelligent Mail® Barcode Accounting (IMbA™). Customers can take advantage of the system's efficiencies to improve their visibility into their QBRM™ pieces.

3% DISCOUNT

Static Barcode

6% DISCOUNT

Serialized Barcode

REGISTRATION PERIOD   May 15, 2023 – Dec 31, 2023

PROMOTION PERIOD   Jul 1, 2023 – Dec 31, 2023

ELIGIBLE MAIL:

- First-Class Mail® Single-piece Qualified Business Reply Mail™ letters and cards

**REPLY MAIL
IMbA PROMOTION**

PROCESS
AT A GLANCE

1. Setup QBRM Permit and Link to Enterprise Payment System (EPS)

2. Submit samples for review to the Mailing Promotion Portal

3. Register for the Promotion via the Business Customer Gateway

4. Monitor Invoices via the BCG in 'Mailing Reports (PostalOne!)

QBRM And IMBA Setup

QBRM and IMbA Setup Process

Process for customers new to QBRM and IMbA

1. Contact mailing requirements (MSSC) to begin IMbA on-board process. 877-672-0007 (option 2, option 1)

2. Email PS form 6805 to the MSSC requesting QBRM ZIP +4 code assignment

3. MRC will send PS form 6805 to AMS for unique QBRM ZIP +4 code assignment

4. MRC will send completed 6805 back to you

5. Create artwork with QBRM ZIP +4 code printed on reply piece

6. Submit ten physical samples to MDA for evaluation with completed PS form 6805

7. If samples are approved, customer will receive completed form

8. MRC will enable IMbA and customer is automatically enrolled in IMbA Parallel
   - Customer will be notified when out of parallel and IMbA functionality is live for them

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QBRM and IMbA Setup Process

Process for customers QBRM customers without IMbA

1. QBRM Mailer contacts MSSC for IMbA enrollment

2. MSSC will log into PostalOne! and enter QBRM approval if requirements are met, product details entered

3. QBRM Mailer onboarded to IMbA in parallel

4. HQ IMbA program office monitors data flow to ensure proper invoicing

5. After parallel mode, customer is migrated to IMbA

6. Customer is notified they have been onboarded in IMbA and are no longer in parallel

IMbA Parallel

- Customers will initially enter **IMbA Parallel** upon completing the onboarding process
- Ensures quality of the pieces and that all systems are working properly
  - Monitored by HQ IMbA Team
- Pieces received during the parallel period will not receive the promotional discount
- Customer will be notified when their data indicates they can exit parallel

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Action Items

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Action Items: Letters

Year	Month	Assignee	Track	Category	Action Item	Response
2020	January	James Duffy	Letters	Mailer Scorecard	**RECEIVED APPROVAL FOR EXTERNAL ACCESS TO IMAGES! Will use same process for internal and external sharing of images.**	**Work is continuing and targeted end of FY for prototype & demonstration**
2021	Nov	Juliaann Hess Ali Turner	Letters	ID/PTR	Timeline on when functionality of Informed Delivery and PTR will move to the cloud.	**6/15 - ID is already in the Cloud as of now, PTR is pending.**
2022	April	Sheila Marano	Letters	Communications	Update needed for next (July) MTAC on electronic Certificate of Mailing (COM).	
2022	July	James Duffy	Letters	EPS	Can't pay negative balance for accounts with EPS. Explore extending the proposed three-day grace period to 10 days.	**CR scheduled for 6/25/2023**
2022	July	Garrett Hoyt --> Angela Lawson	Letters Packages	API	Request for API to receive permit balance information. Steve K. and Deb Damore volunteered to assist.	**In progress**

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Action Items: Promotions

Year	Month	Assignee	Track	Category	Action Item	Response
2022	July	Heather Lewis Tariq Mirza Steve Krejcik	Promotions	BCG	BCG Delegation in BCG doesn't give submitter full access - eDoc submitters should be able to see incentive discounts for all their submissions but can only see those in their permit number.	
2022	July	James Duffy	Promotions	Reports	Allow incentive programs to include consolidated CRIDs one at a time for reporting.	**Promotions Office? Add Codes to transaction History Report**
2022	July	Margaret Pepe Heather Lewis	Promotions		Review integrating Informed Delivery campaign portal with the promotion's portal.	

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Questions?

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