UNITED STATES
POSTAL SERVICE ®

2017 Earned
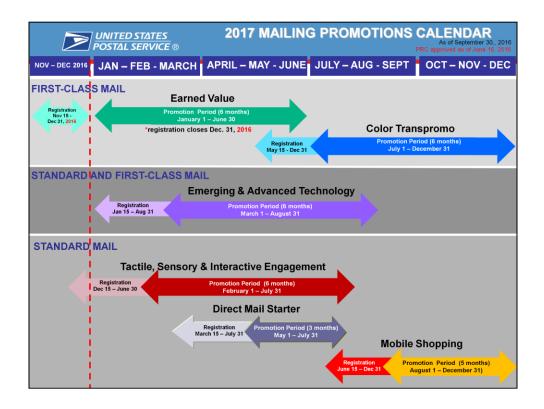# Value Promotion

October 26, 2016

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Agenda

- ➢ **2017 Promotions Calendar**
- ➢ **Overview of 2017 Earned Value Promotion**
- ➢ **Promotion Dates**
- ➢ **Process**
- ➢ **Benefits**
- ➢ **Registration Process**
- ➢ **What is New?**
- ➢ **Resources**
- ➢ **Questions**

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Discuss the Registration and Promotion Periods for each Promotion in the 2017 Mailing Promotions Calendar

Earned Value

Mailers enrolled in the 2017 Earned Value Promotion will earn credits for BRM, CRM, and Alternate Postage pieces. Credits can be applied toward future mailings of First-Class Mail presort and automation cards, letters and flats and Standard Mail letters and flats.

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Promotion Dates

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Registration Period: November 15th through December 31st 2016

Promotion Period: January 1st through June 30th 2017

Eligible Mail: Business Reply Mail, Courtesy Reply Mail,
                               and Alternate Postage cards and letters

Acceptance Period   Quarter 1 January 1st through March 31st 2017
for Credits: Quarter 2 April 1st through June 30th 2017

The volumes must be accepted by September 15th 2017; otherwise the credits will be forfeited. The credits will be released when the participant agrees to their volumes after each quarter.

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Promotion Dates

Earned Value Credits: $0.05 per BRM, CRM, and Alternate Postage pieces counted based on their enrolled MID's
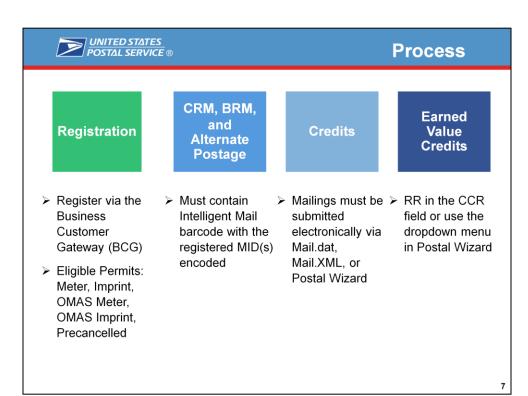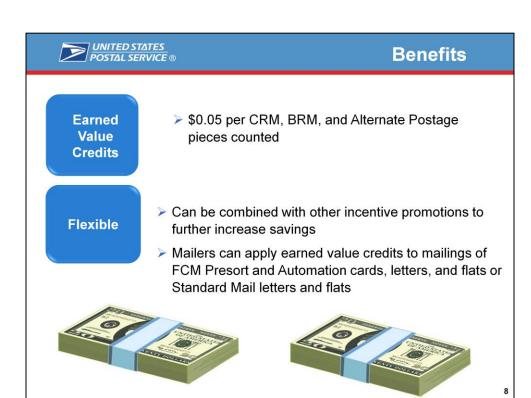
Expiration Date for Credits: December 31st 2017

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Process

Registration	CRM, BRM, and Alternate Postage	Credits	Earned Value Credits
➢ Register via the Business Customer Gateway (BCG) ➢ Eligible Permits: Meter, Imprint, OMAS Meter, OMAS Imprint, Precancelled	➢ Must contain Intelligent Mail barcode with the registered MID(s) encoded	➢ Mailings must be submitted electronically via Mail.dat, Mail.XML, or Postal Wizard	➢ RR in the CCR field or use the dropdown menu in Postal Wizard

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Benefits

Earned Value Credits

➤ $0.05 per CRM, BRM, and Alternate Postage pieces counted

Flexible

➤ Can be combined with other incentive promotions to further increase savings

➤ Mailers can apply earned value credits to mailings of FCM Presort and Automation cards, letters, and flats or Standard Mail letters and flats

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Registration: New BCG Users

Sign In

Username

Password

Sign In   Forgot password?

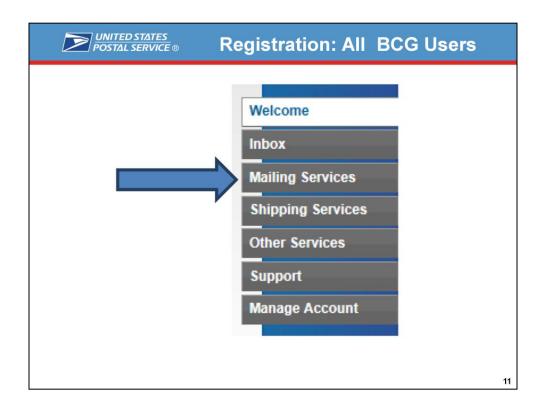Not a registered USPS Business Customer yet?

Register for free

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New BCG Users:

1. Navigate to the BCG: https://gateway.usps.com
2. Click Register for Free
3. Enter the required information: username, password, security questions, name and basic contact information. If you have a CRID you will need to enter it here. Click Create Account. If you do not have a CRID you will automatically be assigned one.
4. You will receive an automatic email confirming that your Business Account/CRID has been activated. Now you can log into the system and enroll for the 2017 EV Promotion using the steps for the existing BCG Users.

Registration: Existing BCG Users

Sign In

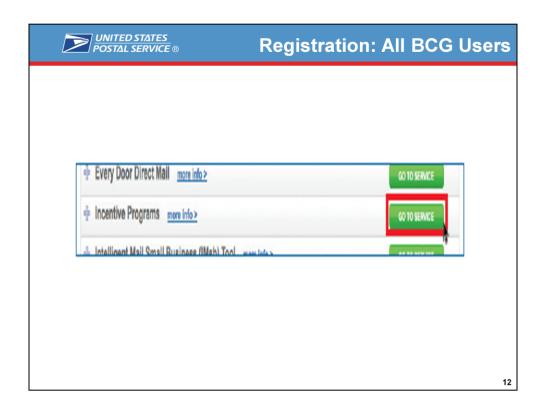Username

Password

Forgot password?

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Existing BCG Users:

Business Account Holders can go directly to the enrollment process.
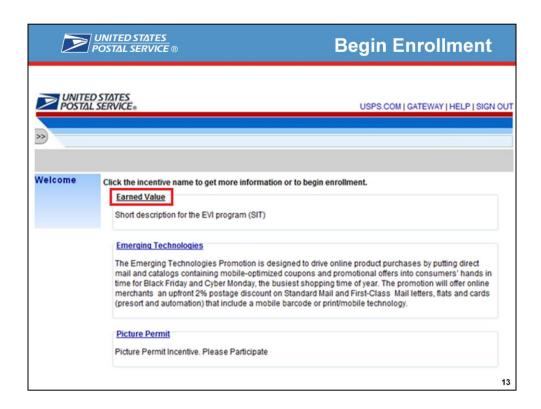
Log into the BCG at https://gateway.usps.com

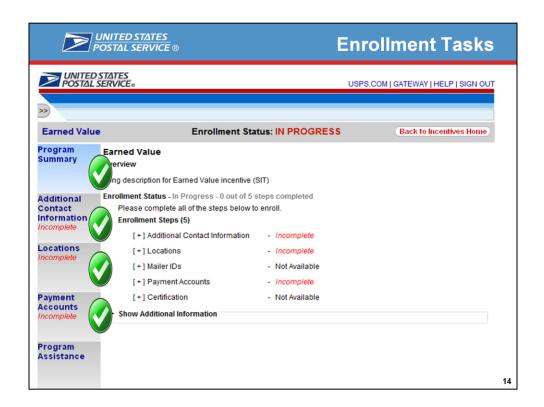There are four steps to enroll in the Earned Value Promotion:

1. Navigate to the BCG: https://gateway.usps.com and sign in to display the Welcome Screen
2. Select Mailing Services to the left of the Welcome Screen

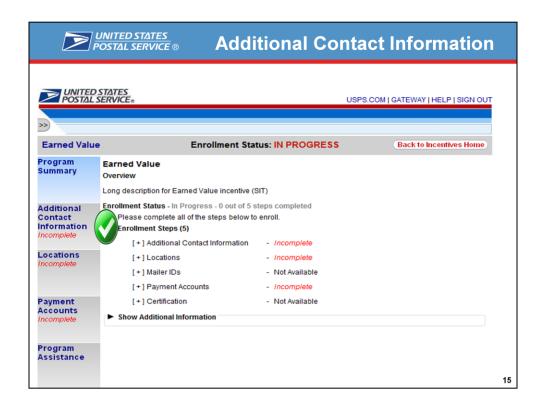1. Go to Incentive Programs in the list displayed; Select **Go to Service**

Select the *Earned Value Promotion* and then select Begin Enrollment

UNITED STATES POSTAL SERVICE ® — Enrollment Tasks

UNITED STATES POSTAL SERVICE®   USPS.COM | GATEWAY | HELP | SIGN OUT

Earned Value   Enrollment Status: **IN PROGRESS**   Back to Incentives Home

Program Summary

Earned Value
Overview

ng description for Earned Value incentive (SIT)

Additional Contact Information *Incomplete*

Enrollment Status - In Progress - 0 out of 5 steps completed
Please complete all of the steps below to enroll.
Enrollment Steps (5)

[+] Additional Contact Information - *Incomplete*

Locations *Incomplete*

[+] Locations - *Incomplete*

[+] Mailer IDs - Not Available

[+] Payment Accounts - *Incomplete*

[+] Certification - Not Available

Payment Accounts *Incomplete*

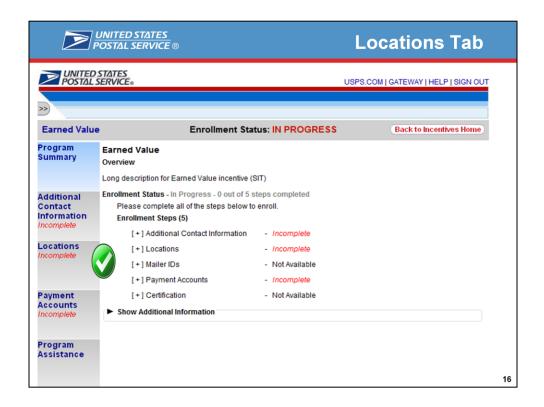**Show Additional Information**

Program Assistance

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Follow the Enrollment Tasks

Complete the Enrollment tasks by using the tabs located on the left-hand side of the page, or by clicking the links associated with each step. As you complete each task, the system will display the task as "Complete". Some Enrollment tasks become available only after other tasks have been completed.
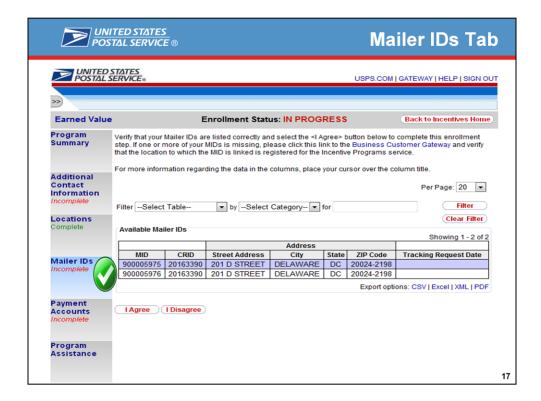
Additional Contact Information

The Additional Contact Information page allows you to save contact information for an alternative primary contact and for a technical contact. You are required to enter the information for the alternative primary contact in order to complete this task.

United States Postal Service — Locations Tab

UNITED STATES POSTAL SERVICE ®   USPS.COM | GATEWAY | HELP | SIGN OUT

Earned Value   **Enrollment Status: IN PROGRESS**   Back to Incentives Home

Program Summary

Earned Value

Overview

Long description for Earned Value incentive (SIT)

Additional Contact Information *Incomplete*

Enrollment Status - In Progress - 0 out of 5 steps completed

Please complete all of the steps below to enroll.

Enrollment Steps (5)

[+] Additional Contact Information   - *Incomplete*

Locations *Incomplete*

[+] Locations   - *Incomplete*

[+] Mailer IDs   - Not Available

[+] Payment Accounts   - *Incomplete*

Payment Accounts *Incomplete*

[+] Certification   - Not Available

► **Show Additional Information**

Program Assistance

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Locations Tab

The Locations page allows you to review your participating mailing locations. You must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.

You will want to enroll all locations/CRIDs for which there are eligible MIDs you wish to use for the Earned Value Promotion. If CRIDs are missing the MIDs associated to those CRIDs will not be enrolled in the promotion and therefore you will not receive any credits. Therefore, you will need to go back into the BCG and follow the steps into the Earned Value Promotion. Once you are in the promotion then you will need to go to the Locations Tab and add them. Next you will need to verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.

United States Postal Service — Mailer IDs Tab

USPS.COM | GATEWAY | HELP | SIGN OUT

Earned Value   **Enrollment Status: IN PROGRESS**   Back to Incentives Home

Verify that your Mailer IDs are listed correctly and select the <I Agree> button below to complete this enrollment step. If one or more of your MIDs is missing, please click this link to the Business Customer Gateway and verify that the location to which the MID is linked is registered for the Incentive Programs service.

For more information regarding the data in the columns, place your cursor over the column title.

Per Page: 20

Filter --Select Table-- by --Select Category-- for [   ]   Filter   Clear Filter

Available Mailer IDs   Showing 1 - 2 of 2

| MID | CRID | Address | | | | Tracking Request Date |
		Street Address	City	State	ZIP Code	
900005975	20163390	201 D STREET	DELAWARE	DC	20024-2198	
900005976	20163390	201 D STREET	DELAWARE	DC	20024-2198	

Export options: CSV | Excel | XML | PDF

I Agree   I Disagree

Program Summary / Additional Contact Information (Incomplete) / Locations (Complete) / Mailer IDs (Incomplete) / Payment Accounts (Incomplete) / Program Assistance

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Mailer IDs Tab

The Mailer IDs tab will only become available once the Locations tab has been completed. It allows you to review your participating mailer IDs. You must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task.

Note that you will need to enroll all CRIDs/locations for which there are eligible Mailer IDs that you plan to use for the promotion. Only business locations that are registered for the Incentive Program's service will have their associated Mailer IDs displayed in the Mailer IDs tab.
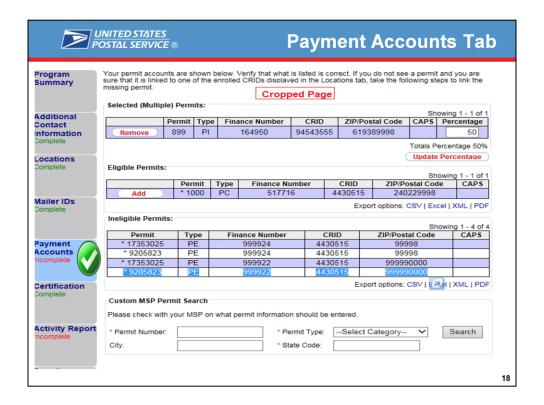
Unavailable Mailer IDs

Multiple Mailer IDs may be Unavailable for enrollment to you when they have already been enrolled by another user. A Mailer ID is referred to as shared when its parent CRID (i.e. the CRID to which it belongs to) has been registered for the Incentive Program's service by multiple users.

Adding a Mailer ID post-agreement

If a Mailer ID is added to one of your participating CRIDs after you have already agreed to the list presented in the Mailer IDs tab and you want it to participate in the program, you must refresh your list of MIDs. To do this, you must return to the MIDs tab and follow
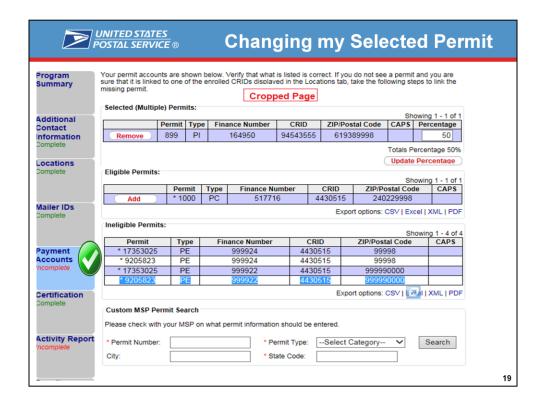
the steps indicated on the page.

Payment Accounts Tab — United States Postal Service

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs displayed in the Locations tab, take the following steps to link the missing permit.

Cropped Page

Selected (Multiple) Permits:
Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS	Percentage
Remove	899	PI	164950	94543555	619389998		50

Totals Percentage 50%
Update Percentage

Eligible Permits:
Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
Add	* 1000	PC	517716	4430515	240229998	

Export options: CSV | Excel | XML | PDF

Ineligible Permits:
Showing 1 - 4 of 4

Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
* 17353025	PE	999924	4430515	99998	
* 9205823	PE	999924	4430515	99998	
* 17353025	PE	999922	4430515	999990000	
* 9205823	PE	999922	4430515	999990000	

Export options: CSV | Excel | XML | PDF

Custom MSP Permit Search

Please check with your MSP on what permit information should be entered.

* Permit Number: [_____]   * Permit Type: --Select Category-- ▼   [Search]
City: [_____]   * State Code: [_____]

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Payment Accounts Tab (for Mail Owners) / Permit Accounts (for MSPs)

The Payment Accounts tab allows you to review the permits that are associated to your registered business locations. If a permit is added to one of your participating CRIDs, you have to wait 30 minutes for the new permit to display on the page. In order to use the credit accrued during the promotion, you will have to use your selected permit/permits to pay for postage when claiming the incentive in the postage statement. You must verify the accuracy and completeness of the permits so that you will be able to use the credit you accrued during the promotion. Once you have verified your permits you must finalize your permit selections before the award claim period begins. You can do so by clicking on the <I Agree> button.

Selecting Multiple Permits

You can select one or more permits to split your credit by allocating percentage values to each permit. You may select an eligible or custom permit. To assign a percentage value to a single permit or multiple

permits, click on the ADD button displayed under the Eligible Permits table.

Changing my selected permit – Eligible Permits

You can change the selected eligible or custom permit at any time up to the start of the Award Claim Period. To change your permit percentage allocation click on the remove button. Be sure to click on the I Agree button once you make your changes.

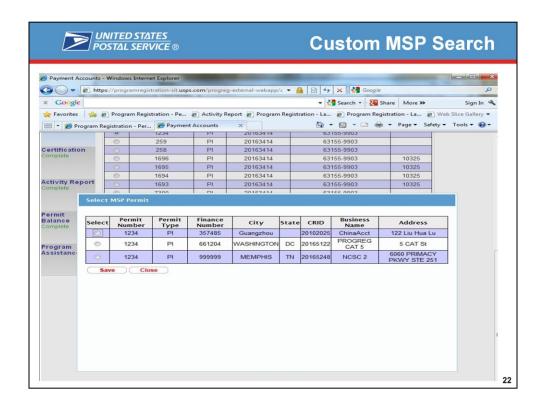**Note: Once the Award Claim Period has started your permits and credit allocations are sent to PostalOne! and cannot be changed.**

Eligible and Ineligible Permits

Based on the permit types allowed by the incentive program, your permits will be sorted as eligible or ineligible For the Earned Value Promotion. The only eligible permits are Metered (MT), Precanceled (PC), Permit Imprint (PI), OMAS Imprint (OI), and OMAS Metered (OM).

Custom MSP Permit Search

The Custom MSP Permit Search is available to Mail Owners in order to search for and retrieve MSP permits the credit will be applied to. A MSP permit can be selected up until the start of the Award Claim Period . The Permit Number, Permit Type, and State Code are denoted as required fields; the City is optional for the user to enter.

Custom MSP Permit Search

Once a MSP Permit is searched for, a "Select MSP Permit" pop-up will display the Permit Number, Permit Type, Finance Number, City, State, CRID, Business Name, and Address of the company. The user can select which MSP Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the MSP Permit table will be populated with your selection on the Payment Accounts screen with the following fields: Permit Number, Permit Type, CRID, ZIP/Postal Code, and CAPS info.

Once a Mail Owner Permit is searched for, a "Select Permit" pop-up will display the Permit Number, Permit Type, Finance Number, City, State, CRID, Business Name, and Address of the company. The user can select which Mail Owner Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the Mail Owner Permit table will be populated with your selection on the Permit Accounts screen with the following fields: Permit Number, Permit Type, CRID, ZIP/Postal Code, and CAPS info.

Certification Tab

The Certification tab becomes available once the preceding steps have been completed. You must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, you are enrolled in the promotion. You will know that you are fully enrolled when you see the Enrollment Status change to "Enrolled".
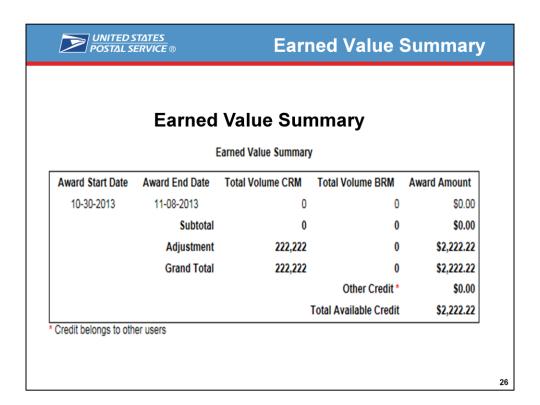
Activity Report Tab

Once completely enrolled, the Activity Report tab and Permit Balance tab will display below the Certification tab.

The Activity Report section provides both a high-level and a detailed view of volume and earned credits from Business Reply Mail (BRM), Courtesy Reply Mail (CRM), and Alternate Postage pieces. It lets you know where your earned credit is coming from. You will have to agree to the volume and credit acquired in order to receive the credit.

The top section of the Activity Report, displays the percentage allocated to the permits and credit amount. This information will update automatically if you decide to change your percentage allocation on the payment accounts tab.

Earned Value Summary

Earned Value Summary

Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
10-30-2013	11-08-2013	0	0	$0.00
	Subtotal	0	0	$0.00
	Adjustment	222,222	0	$2,222.22
	Grand Total	222,222	0	$2,222.22
			Other Credit *	$0.00
			Total Available Credit	$2,222.22

* Credit belongs to other users

Earned Value Summary

Total Volumes for each piece type (i.e., BRM or CRM) are obtained by adding up the tracked volumes across all your participating Mailer IDs. The Award Amount is computed based on the Total Volume which is obtained by adding up Total CRM Volume multiplied by the CRM Credit Per Piece and Total BRM Volume multiplied by the BRM Credit Per Piece. [Note: The credit per piece for BRM and CRM are defined by the Program office.]
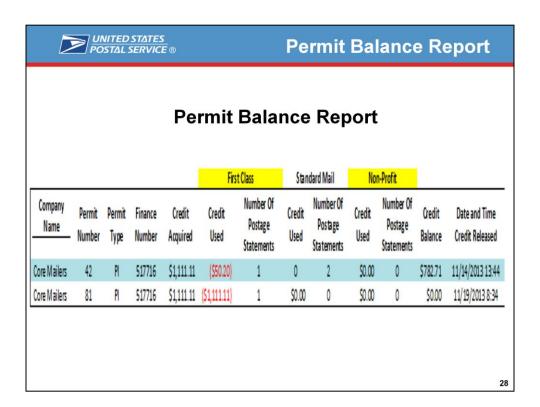
As a mailer, you can see how your earned Award Amount grows as more and more returned pieces are scanned and entered into the system.

The *Other Credit* field will only be populated if other mailers from your company enrolled in the program and selected the same permit as you for their award destination account. The Other Credit field displays the total award amount earned by these mailers. Note that all mailers who are authorized to use a permit could use the credit associated to it once it has been released by the Program Office.

Earned Value Detail Report

Earned Value Detail Report

CRID	Company	MID	JUN 2012		JUL 2012		AUG 2012	
			CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces
20400413	Company A	900008256					148	448
20499224	Company B	900008303		296		1,359		2,371

SEP 2012		OCT 2012		Total CRM	Total BRM	Total CRM Adjustment	Total BRM Adjustment	Net CRM	Net BRM	Credit Amount for CRM	Credit Amount for BRM
CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces								
1,048	2,048		3,448	1,196	5,944	-20	0	1,176	5,944	$1,176.00	$297.20
	202		1,064	0	5,292	30	60	30	5,352	$30.00	$267.60

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Earned Value Detail Report

The bottom section, Earned Value Detail Report, provides a detailed view by Mailer ID (MID). Each row represents a different MID for which it displays the total returned volume broken down into CRM and BRM pieces by month.
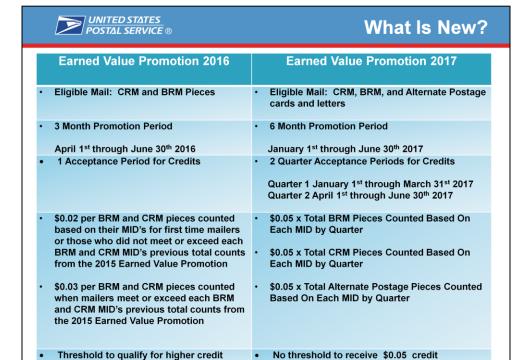
Permit Balance Report

The top section of the Permit Balance report, the Permit Balance Summary, displays a high-level view of your credit usage by mail class. Information is refreshed nightly to reflect data updates from the previous day.

This view lets you track the history of your credit's usage. It provides high-level information such as the amount of credit used per mail class, the number of postage statements per mail class on which the credit was used, and the remaining credit balance.

As a mailer, you can see how your earned credit gets used as you claim the incentive by populating the promotion code in your eDoc submissions.

Permit Balance Detail Report

Permit Balance Detail

Mailing Date	Postage Statement Seq Number	Mail Class	Total Adjusted Postage	Total Pieces	Incentive Amount
12/12/2012	5200438	SM	$159,154.14	650,105	-$5.98
12/12/2012	5200439	SM	$70,805.94	300,109	-$5.98
12/12/2012	5205457	SM	$.40	1	-$5.98
12/12/2012	5205475	FC	$34.87	94	-$5.98
12/12/2012	5205480	FC	$34.87	94	-$5.98
12/12/2012	5205695	FC	$228.66	980	-$5.98
12/12/2012	5224673	SM	$1,078.64	5,474	-$5.98
12/12/2012	5224720	SM	$364.32	0	-$5.98
12/12/2012	5224722	SM	$160.43	0	-$5.98
12/12/2012	5224733	SM	$.84	4	-$5.98

Download to Excel

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The bottom section, the Permit Balance Detail, provides a detailed view of your credit usage broken down by each individual Postage Statement. It lets you track the history of your credit usage giving you detailed information such as the amount of credit used per postage statement, the date when it was used, and the Postage Statement Sequence Number.

Resources

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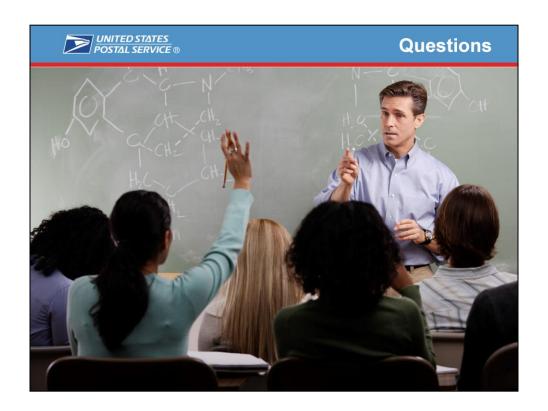The Earned Value Program Office email is: **EarnedValue@usps.gov**

The Promotions Office responds to all inquiries within 4 business days upon receipt of emails to the promotion email address.

The Alternate Postage Program Office email is:
alternatepostage@usps.gov

The Program Requirements and FAQs are posted on RIBBS
https://ribbs.usps.gov/index.cfm?page=mailingpromotions

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And that concludes our presentation.   Any questions?