

Intelligent Mail® Transitioning to Seamless Acceptance

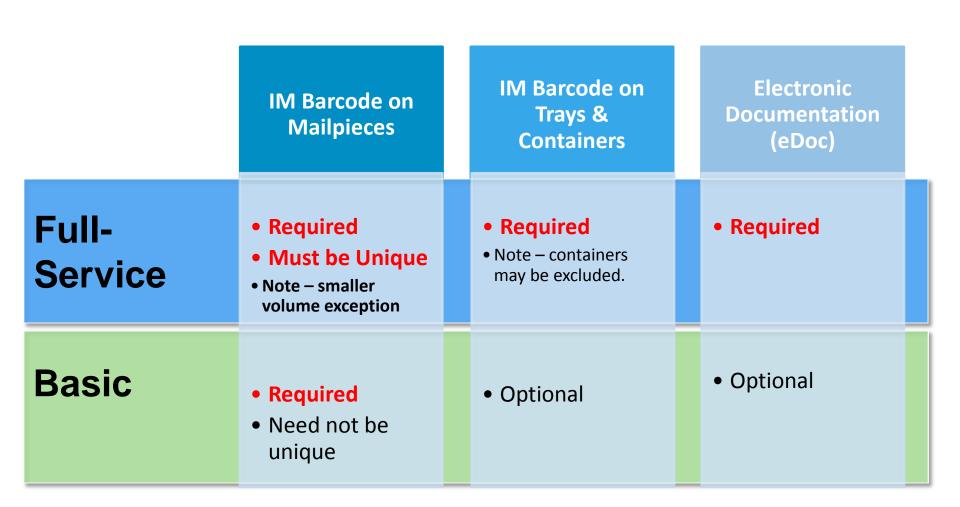
Greater Portland Postal Customer Council
August 21, 2014

Topics

- Overview of Intelligent Mail® Basic and Full-Service
- MIDs & CRIDs
- Seamless Acceptance
- Mailer Scorecard and Reporting
- Mail Anywhere & Fee Waiver
- eInduction
- Questions

Overview

Comparing Basic and Full-Service Requirements



Requirements

Intelligent Mail® Barcodes

☐ Intelligent Mail barcodes have been developed for mailpieces, trays and containers





Intelligent Mail Barcode for Mailpieces



Intelligent Mail Barcode on Handling Units





Full-Service Requirements

Intelligent Mail Barcode

- Barcode Uniqueness
- Valid Service Type Identifier
- Valid MID

Electronic Documentation

- Valid MIDs & CRIDs
- By/For Information

eDoc Requirements

- The four options for submitting electronic documentation are:
 - Mail.dat
 - Mail.XML
 - Postal Wizard
 - For mailings of less than 10,000 identical-weight pieces or less than 10,000 pieces with correct postage affixed to each mailpiece
 - Intelligent Mail for Small Business (IMsb) Tool
 - For mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually

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What is a CRID?

- A CRID is a Customer Registration ID
- A unique ID number issued by USPS to identify a customer's physical business location (address)
 - There should only be one CRID for each business location



Examples - What is a CRID?

ABC Company has one business location and has only one CRID assigned

XYZ Company has multiple business locations. A CRID is assigned to each location

ABC Company





555 Main St. Chantilly, VA 20152

XYZ Company



4417012



2485 Staff Rd. Medford, OR 97504



4439712



730 Brock Cir. York, PA 17404



4469221



734 79th Ave. Miami, FL 33109

What is a Mailer ID?

- A six- or nine-digit number issued by USPS to identify a Mail Owner or Mail Preparer
 - Six- or nine-digit number assigned based on annual mail volume



- A MID is used:
 - In Intelligent Mail (IMb) barcodes
 - To identify a Mail Preparer or Mail Owner within eDoc
 - To determine to whom mailing information and reports should be distributed
- When the Postal Service issues a MID, it is always associated with a business location (CRID) so that the Postal Service knows to whom the MID is associated
- A single MID may be associated with a business location (CRID) or multiple MIDs may be associated with a business location

How are MIDs Associated with CRIDs?

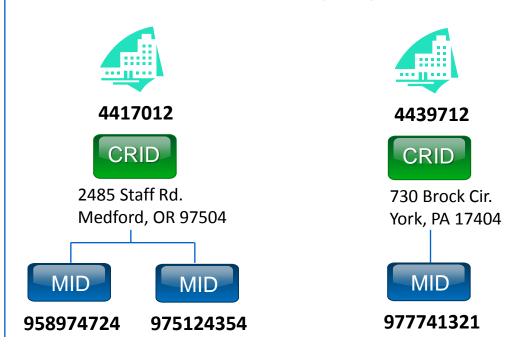
ABC Company has one business location and has one MID associated with their CRID

ABC Company



XYZ Company has multiple business locations and has multiple MIDs associated with the Medford, OR CRID and a single MID associated with the York, PA CRID

XYZ Company



How are CRIDs and MIDs Used?

Purpose	CRID	MID
Used to identify eDoc Submitter	V	
Used to identify Mail Preparers and Mail Owners in eDoc	V	V
Used to determine to whom mailing information and reports should be distributed	V	V
Used in Intelligent Mail barcodes (IMb)		$\sqrt{}$
Used to identify a data distribution profile for Full-Service feedback		V

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Seamless Acceptance

What is Seamless Acceptance?

- Automates and simplifies the entry, verification, and induction of commercial mail
- Designed to replace traditional verification model of upfront manual verifications being performed on a per-mailing basis
- Measures the quality of a mail preparer's process over a calendar month to identify mail quality issues
- Is done <u>post</u>-induction, thus eliminating the need for mailers to rework and resubmit mailings

Seamless Acceptance

- Enables automated verification process by comparing scan data to eDoc at induction and as mail flows through postal automated processing equipment
- Leverages Intelligent barcodes on mailpieces, handling units, and containers and electronic documentation
- Utilizes sample scanning at induction and mail processing equipment scans to evaluate mail quality, payment, and location

Automated Verification via Hand-Held Sampling

- Verifications are performed by comparing data collected through FS-IMD sampling to the information submitted in eDoc for the following categories:
 - · Postage Payment Method
- Postage Affixed
- Barcode Construct

Content

Presort

Undocumented Mail

Piece Weight

Automated Verification and Validation via MPE

- Verifications are performed on data from mail operations by comparing MPE scan data to the information submitted in eDoc for the following categories:
 - · Barcode Scan Rate

Entry Location

Undocumented Mail

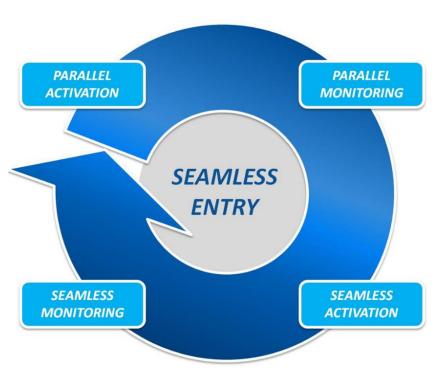
Move Update

Presort

Reporting

- Verifications results on the Seamless Acceptance Dashboard/Reports
- Users will be able to access detailed information about mail quality





- 1. Mailer submits eDoc
- 2. Statements auto-finalize
- 3. Capture sampling data using handheld scanners
- Capture data from Mail Processing Equipment (MPE) scanning
- 5. Compare data captured to eDoc
- 6. Detailed Mail Quality reporting

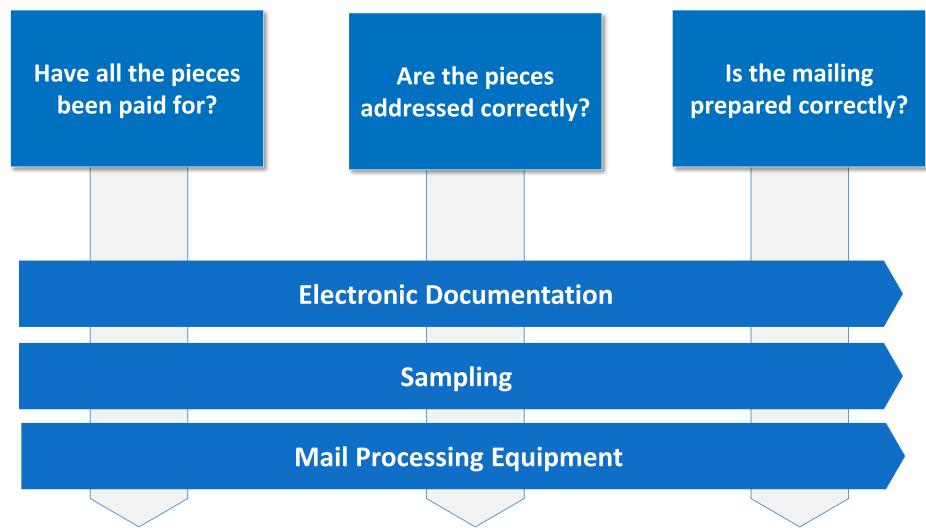
- Scans and samples are compared to electronic documentation
 - Data collected over the entire calendar month will be used to evaluate quality
 - A problem with a single mailing won't result in additional postage

Current:

Quality determined based on a limited numbers of mailings and mailpieces, then extrapolated to all mailings



Future: All mailings submitted in an entire calendar month are used to determine quality



Have all the pieces been paid for?

Undocumented (Piece)

Piece barcode is paid for and included in an eDoc

Are the pieces addressed correctly?

Delivery Point

Confirms that 5-, 9-, or 11-digit delivery point in the IMb is valid

Move/Update

Validates that addresses in a mailing list are periodically updated

Is the mailing prepared correctly?

Weight

Physical weight matches the weight in the eDoc

Barcode Quality (Piece)

IMbs are formatted per USPS standards

Postage

Postage affixed matches the eDoc

Nesting/Sortation

Physical sortation meets mail preparation rules

Mail Characteristic

Mail traits match eDoc (processing category; class; non-profit; etc.)

Barcode Scan Rate (Piece)

IMbs are machine readable

• As part of Seamless Acceptance, the following verifications will be performed:

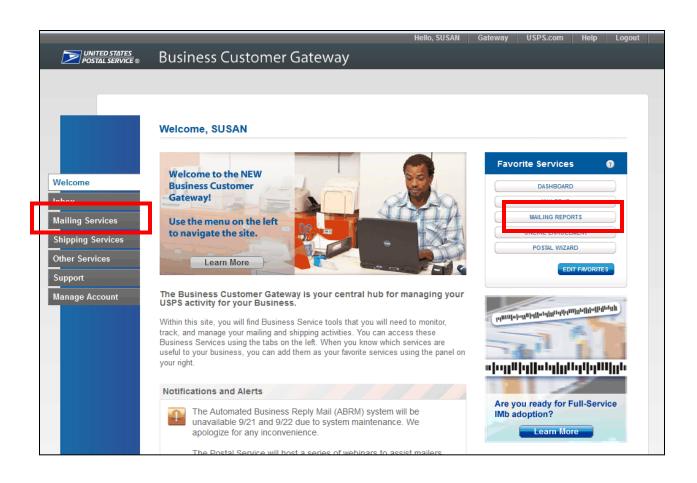
Verification	eDoc	Mail Processing Equip. (MPE)	Sampling	Mailer Contact Threshold	Egregious Threshold
Undocumented		X	X	0.5%	0.8%
Delivery Point	X			2%	5%
Move/Update		X		0.05%	0.15%
Nesting/Sortation (MPE)		X		1%	3%
Nesting/Sortation (eDoc)	X			2%	4%
Nesting/Sortation (Sampling)			X	3%	5%
Mail Characteristic			X	0.1%	0.5%
Postage			X	2%	5%
Weight			X	3%	5%

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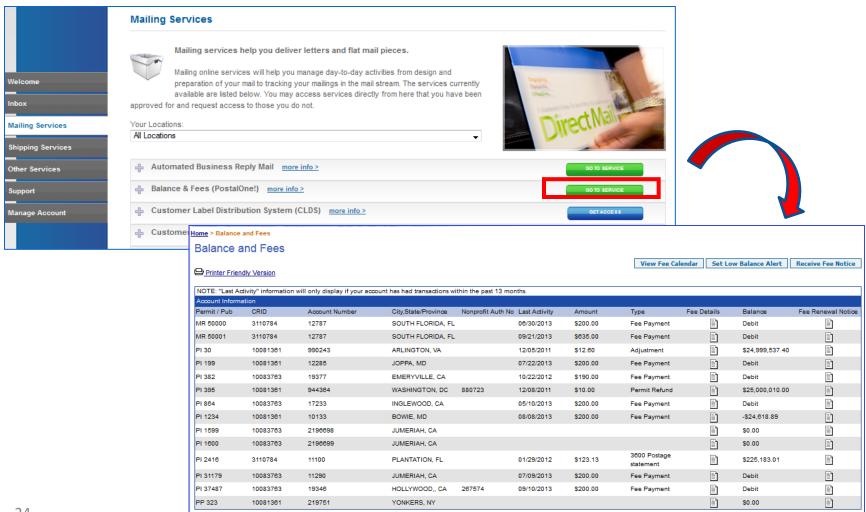
How to Access Mailing Reports

Full-Service reports can be accessed through the Welcome page of the BCG by clicking on "Mailing Services" on the left or by accessing "Mailing Reports" under Favorite Services.



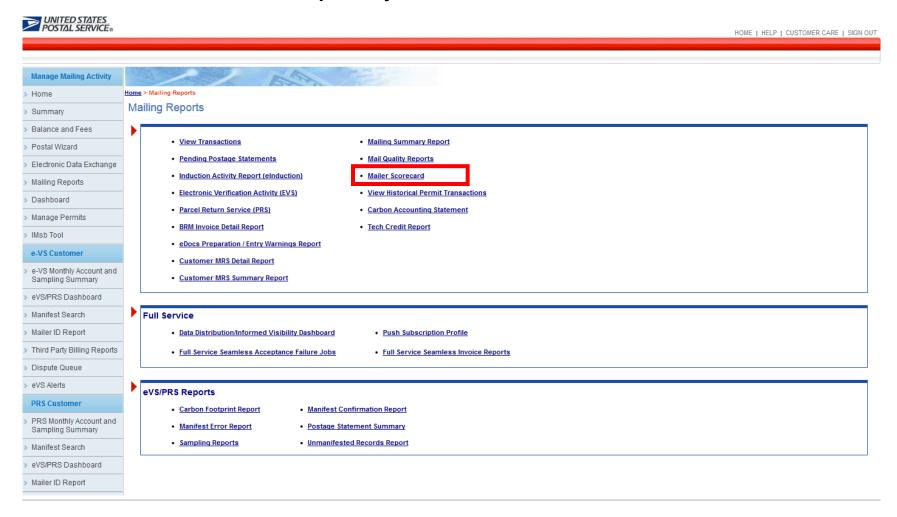
Reports – Balance & Fees

To monitor Balances & Fees associated to permit or publication accounts, under "Mailing Services" select Balance and Fees "Go To Service"



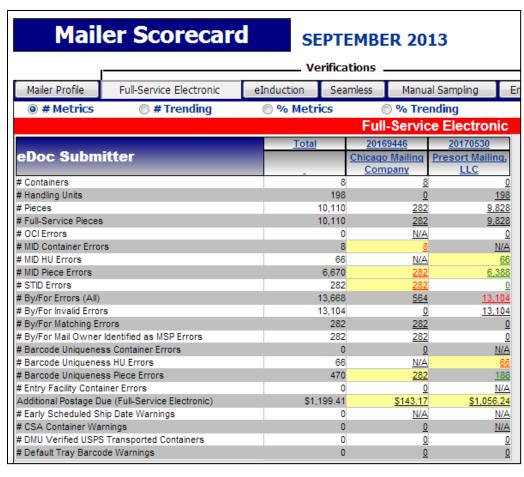
Reports - Mailer Scorecard

The Mailing Reports Page has links to several reports for feedback and data quality



Reports – Mailer Scorecard

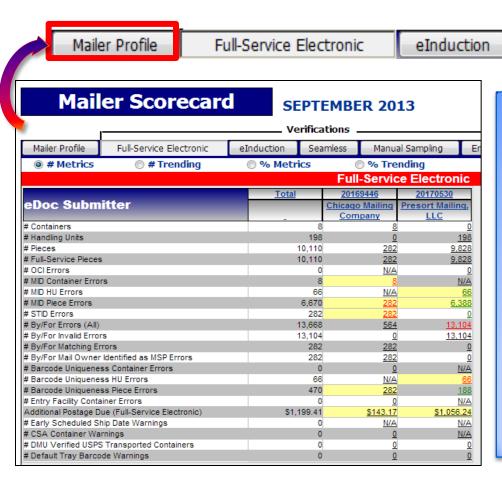
The Mailer Scorecard provides a dashboard view summarizing performance, allowing comparisons across facilities. It is available for any mailer submitting eDoc.



- Changes in metrics since previous month are highlighted
 - Green: metric has improved by more than 5%
 - Red: metric as declined by more than 5%
 - Yellow: metric exceeds USPS threshold

Mailer Scorecard: Seamless

Seamless



Changes in metrics since previous month are highlighted

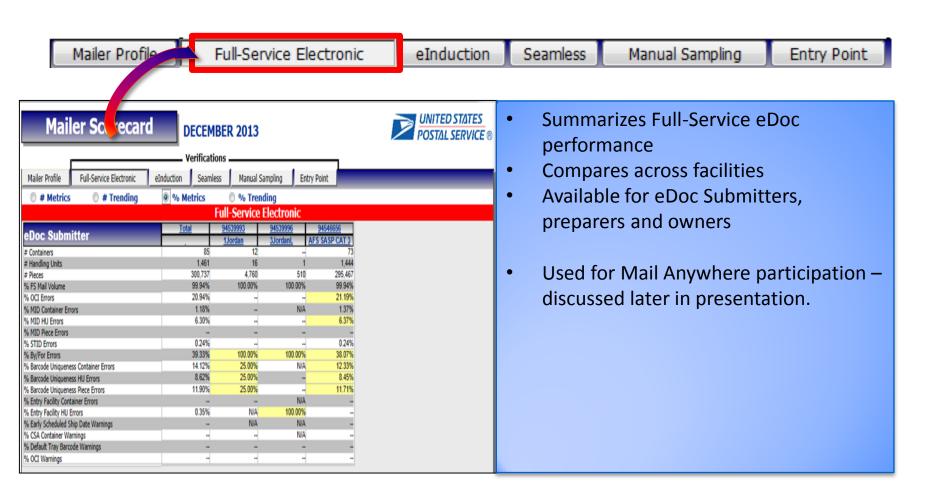
Manual Sampling

Entry Point

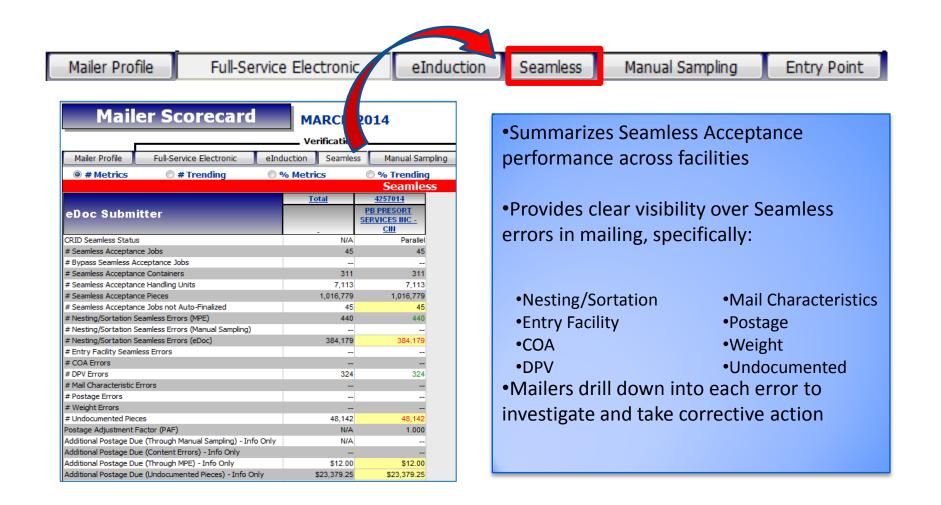
- Green: metric has improved by more than 5%
- Red: metric as declined by more than 5%
- Yellow: metric exceeds USPS threshold
- *For more information on the metric thresholds, reference the Full-Service Verification document on RIBBS:

https://ribbs.usps.gov/intelligentmail_guides/s/documents/tech_guides/FullServiceVerificationJan2014.pdf

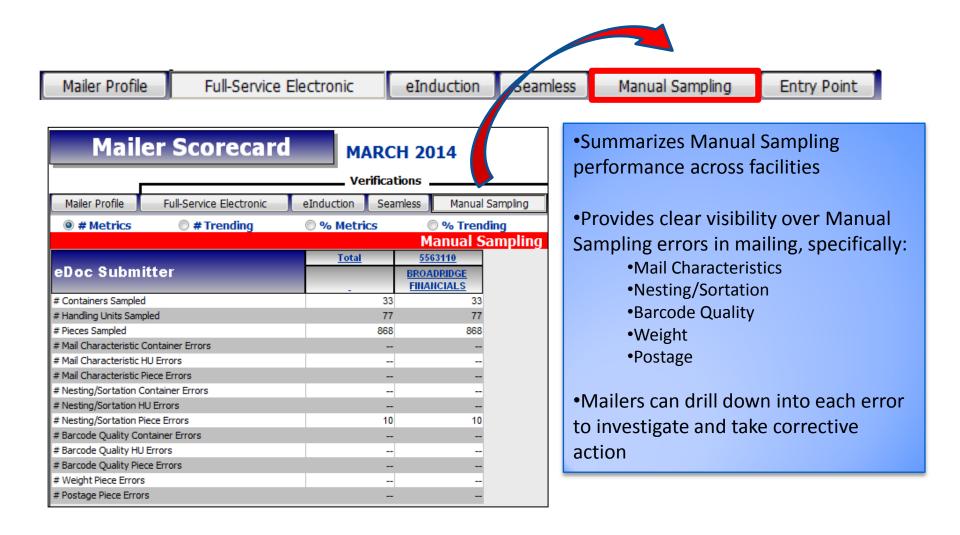
Mailer Scorecard: Seamless



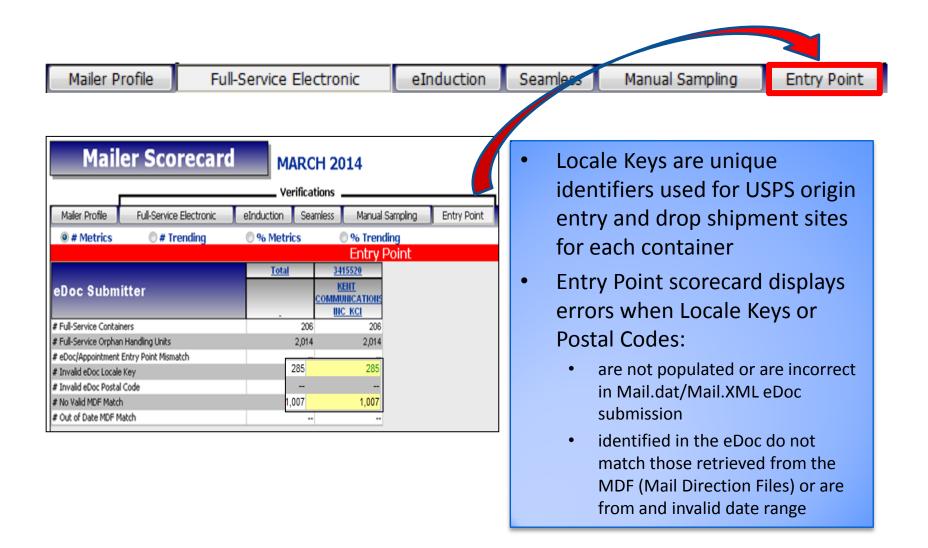
Mailer Scorecard: Seamless



Mailer Scorecard: Manual Sampling



Mailer Scorecard: Entry Point



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Mail Anywhere Eligibility

Below are the Full-Service thresholds Mailers will be evaluated on:

Criteria	Threshold
Full-Service Volume (%)	> 90%
Service Type ID Errors	< 2%
Mailer ID Errors	< 2%
Unique Piece Barcode Errors	< 2%
Unique Tray Barcode Errors	< 2%
Unique Container Barcode Errors	< 2%
Co-Palletization eDoc Errors	< 5%
Entry Facility Errors	< 5%
By/For Errors	< 5%

The PostalOne! Help Desk will evaluate compliance and grant authorization

Mail Anywhere

Eligibility Requirements

- Eligible Full-Service Mail Classes:
 - ☐ First Class Cards, Letters, and Flats only
 - Standard Letters, and Flats only
 - Bound Printed Matter Flats only
 - Periodicals Letters and Flats Only



- Permit Imprint
- OMAS Imprint
- Precanceled Stamps
- Metered



Mail Anywhere

Eligibility Requirements

- Statement Types:
 - Single Permit
 - One permit in a mailing being billed
 - At least 90% FS IMb required
 - Combined Mail
 - Single class of mail
 - Multiple postage payment methods okay
 - At least 90% FS IMb required
- Submission Methods:
 - Mail.dat
 - Mail.XML
 - Postal Wizard (First-Class Mail and Standard Mail only)
 - □ Full-Service only
 - IMsb (First-Class Mail and Standard Mail only)

Fee Waiver

90% Full-Service and Permit Fee Waiver

- Fees waived, provided Full-Service volume for permit stays at 90%
- 90% threshold is tracked cumulatively, over a yearlong time period
- The cumulative period starts over on the presort fee anniversary date
 - Cumulative period runs forward for one year from the fee anniversary date
 - The following year, when the next fee anniversary date is reached, the cumulative starts over again
 - This results in the Full-Service % being reset to zero each year on the fee anniversary date
 - The first mailing after the annual presort fee anniversary date establishes the new cumulative percentage

Fee Waiver

 PostalOne! uses the annual presort fee anniversary date to determine the waiver period

Mail Owners preparing their own mail and Full-Service Waiver

- PostalOne! determines the date the annual fee waiver starts by
 - Date that the permit holder's annual fee expired

Mail Service Providers and Full-Service Waiver

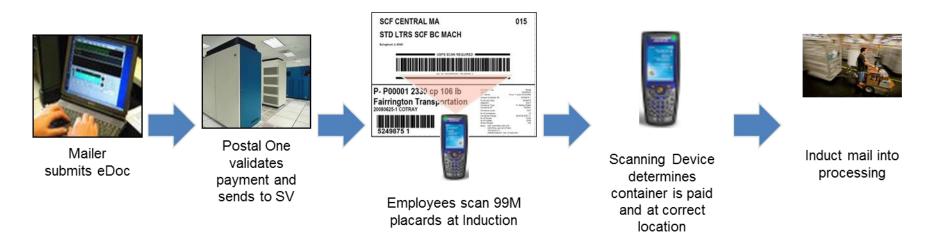
- PostalOne! determines the date the annual fee waiver will start by
 - <u>First-Class Mail</u>: The latest date that both the permit holder's annual fee AND the mailing agent's annual fee expired
 - For Non-First-Class Mail: Date the permit holder's annual fee expired

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eInduction

eInduction will result in quicker appointment processing, reduce errors, and improve revenue protection by removing the reliance on paper forms



	Paper 8125/8017		eInduction
•	Paper forms required for all shipments	• N	lo paper forms required for drop shipment
٠	Entire shipment is held until resolved	• F	ast appointment processing
ì	Appointment issues are resolved by calling origin site (if open) Entry discounts and induction location validated	• 2	Containers resolved individually 24/7 appointment resolution via NCSC
	manually	• A	automated validation of entry discounts

eInduction Process

Eligible rate classes and processing categories:

- First-Class: Letters, Flats, Cards
- Periodicals: Letters, Flats
- Standard: Letters, Flats
- Bound Printed Matter: Flats

Bound Printed Matter parcels are a future processing category that will be made eligible for eInduction

eInduction Process

eInduction Requirements

- Prepare pallets/containers with Intelligent Mail Container Barcodes (IMCB)
- Submit electronic documentation flag containers as eInduction
- Finalize postage statement
- Create/make appointment at each entry point
- Associate pallets/containers to the appointment (Non-SV only) (No longer a requirement with the deployment of the IM-DAS solution, late fall 2014)
- Induct mail at the correct facility

eInduction Validations

Post-induction, actual scan data is combined with the eDoc to perform validations and populate eInduction reports

- Post-induction validations determine if actual induction matched the eDoc
- Reporting provides mailers status information, supports problem resolution, and quality reporting



Validation	Data Used	Checks Made
Payment	Scanned Barcode	Presence of paid eDoc
Mis-shipped	Scan Location	Location matches eDoc
Duplicate	Scanned Barcode	Unique for 45 days
Entry Point Discount	Scan Location	Valid discounts at scan location
Zone Discount	Scan Location	Valid discounts at scan location
After July 2014: Undocumented	Scanned Barcode	Presence of IMcb in paid eDoc

Resources for Mailers

- RIBBS Website: https://ribbs.usps.gov
 - Getting Started Page: https://ribbs.usps.gov/gettingstarted/
 - Business Customer Gateway Information:
 https://ribbs.usps.gov/gateway/
 - Education:
 https://ribbs.usps.gov/index.cfm?page=intellmailpresentations

PostalOne! Help Desk

- Phone: 800-522-9085
- Email: <u>postalone@usps.gov</u>

RIBBS - USPS National Customer Support Center

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IMb Tracing®

Mailer ID

OneCode™ Services

OneCode

Solution™

Package Barcode

Postal Resources

Product Tracking

and Reporting

Service Type

Identifiers (STIDs

Q&A

Site Index

Site Index by Topic

Locators/ Lookups

RSS

Intelligent Mail® Services Intelligent Mail® Services

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Mail Entry Roadmap

The Mail Entry Roadmap describes the Postal Service's key initiatives to streamline the acceptance, induction, and verification of commercial mailings: Full-Service Intelligent Mail®, eInduction, and Seamless Acceptance.

Full-Service Intelligent Mail Requirements for **Automation Prices**

Due to the PRC ruling, the Postal Service is delaying the Jan. 26, 2014, implementation of the Full-Service Intelligent Mail requirement for automation price discounts. Mailers who are not currently enrolled in Full-Service effective Jan. 26, 2014, will still be able to claim automation prices.

eDoc and Full-Service Authorization for Software Vendors

The Postal Service has launched a voluntary process for software vendors and developers to authorize their product(s) in the Test Environment for Mailers (TEM), To get started, click here to review the Mail.dat or Mail.XML guides and access the on-line Enrollment Tool.

Find Daily Updates

What documents were updated or added today? Click on the new "Updates'

IMPORTANT UPDATES

Click here for 2015 Network Consolidations

Click here for Customer Letter regarding 2015 Network Consolidations



Electronic Product Fulfillment

By October 2014, all Address Quality and Address Management products will be provided via the Electronic Product Fulfillment (EPF) method. CD/DVD fulfillment will no longer be an option for product fulfillment. An Electronic Product Fulfillment Form must be completed and submitted prior to October 1, 2014 to avoid interruption in service. If you have any questions or need additional information, please

44

Site Index

Site Index

Printable View

RSS

Locators/

Document

Contact Us.

Intelligent Mail® Education

Intelligent Mail® Services

Latest News Getting Started Business Customer Gatewa

Barcode Decoder/Encode

Barcode for Mailpieces

Guides & Specs IMb Tracing[®] IMb Planning Too

Mailer ID OneCode™ Services

OneCode Solution™

Package Barcode Postal Resource

Product Tracking and Reporting

Q&A

Service Type Identifiers (STIDs PostalOne!® Release 38.0.0 will deploy on August 24, 2014 and price and postage statement changes will go into effect on September 7, 2014.

Webinars will be held for mailers to learn about the PostalOne! Release 38.0 updates to functionality, as well as, pricing and postage statement changes. The schedule and topic for the webinars is below.

PostalOne! Release 38.0.0 Business Related Changes - this webinar will cover changes to PostalOne! functionality and postage statement and price changes.

 Friday, August 22, 2014 from 1:00 pm to 3:00 pm eastern Meeting Number: 748 335 429

https://uspsmeetings.webex.com/ uspsmeetings/j.php?J=748335429

Book Adams and the second and the second

Teleconference information:

POSTNET™ Retirement

A Plan for Every Mailer (PDF)

Intelligent Mail Education

Full-Service Frequently Asked Questions and Answers (PDF)

PostalOne! Frequently Asked Questions and Answers (PDF)

Mailing Data Quality Reports Training Updates (PDF)

How to Work with Your Mail Preparer (PPT)

IMb Initial Steps for Mailers (PPT)

Business Customer Gateway (PDF)

Videos

USPS Intelligent Mail Barcode (WMV/38MB)

USPS Intelligent Mail and Seamless Acceptance (WMV/55MB)

Intelligent Mail Move Update DVD

Move Update (WMV/89MB)

Intelligent Mail Barcode Implementation (WMV/139MB)

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Questions



