

Tom Foti, VP, Product Solutions
Garrett Hoyt, VP, Technology Applications

Entry, Payment, Product
Focus Group Leaders

April 5, 2022

Agenda

- **Tom Foti, VP Product Solutions**

- Organizational Changes

- Category 14

- New Mailing Promotion Portal

- **Garrett Hoyt, VP, Technology Applications**

- Non-Standard Length and Non-Compliance for Packages

- Bulk Permit Balance Check

- Structure Change Process



Tom Foti
VP, Product Solutions

Product Solutions – Organizational Changes

PCSC Retirements

Director, PCSC- Charles “Chuck” Tricamo
Manager, Mail Classification- April Everett
Mgr, National Customer Rulings- Beverly Moore
Classification Specialist- Martin Robi

Product Acceptance & Support Updates

Manager, Business Solutions Support- Janine Egloff
Manager, MSSC- Travis Hayes

Product Management

Director, Mailing Services Elke Reuning-Elliott
Manager, New Solutions – Krista Becker

PCSC Appointments

Director, PCSC- Janine Egloff
Manager, Mail Classification- (A) Juan Tosado
Manager, National Customer Rulings- (A) Stephanie Padilla
Classification Specialist- vacant

Product Acceptance & Support

Manager, Business Solutions Support- (A) Brian Kirke
Manager, MSSC- (A) Lolita Starling
Manager, MDA- (A) Michael Conley

Product Management

Director, Mailing Services – Krista Becker
Manager, New Solutions – (A) Heather (Snead) Lewis

Category 14 Update

New Category 14: Single MID-CRID Relationship

Given: MPE piece scans have one documented eDoc submitter for the barcode's MID over a configurable number of days.

When: SASP attempts to categorize the MPE scan

Then: SASP will assign the undocumented error to the single known submitter CRID

- Mailers will be given a grace period (1/23 – 4/30) to resolve single MID-CRID undocumented mail issues
- Category 14 will take precedence over the existing 13 categories



Category 14 Update

Industry has provided valuable feedback since the 1/23/22 implementation

Common Concerns

- eDoc Submitter is not aware they have used the MID or does not have a relationship to the MID Owner
 - Inaccurate MID entry in eDoc creation
- eDoc Submitter may have a relationship to the MID Owner, but limited to a specific class of mail
- eDoc Submitter may have a singular relationship to a MID Owner who may also be an MSP
 - eDoc Submitter may not control how partner MID Owner inducts all volumes
- 120 days may be too short a time period used to identify 1:1 MID relationship
 - Mail Owners may change MSPs over time
- Mail Owners entering barcoded mail with hardcopy postage statements or as Full Rate postage affixed



Category 14 Update

USPS plans to modify logic for Category 14 undocumented

- Grace period will be extended until 8/31/22
- 1st phase will be to modify order of precedence

Current Logic Order of Precedence

1:1 MID – Category 14

Bookending Reassignment – Category 1,2,4,5,7,8

Seamless MID Reassignment via Seamless Administrator

MID on Piece (no reassignment) – Category 3,6,9,10,11,12,13

Recommended Logic Order of Precedence

Seamless MID Reassignment via Seamless Administrator

Bookending Reassignment – Category 1,2,4,5,7,8

1:1 MID – Category 14

MID on Piece (no reassignment) – Category 3,6,9,10,11,12,13



Category 14 Update

USPS plans to modify logic for Category 14 undoc

Grace period will be extended until 8/31/22

Second phase will be to enhance 1:1 MID logic

- Exclude MIDs that belong to known MSPs
- Expand the 120 window to identify 1:1 relationship
- Establish minimum MID usage threshold
- Identify relationship based on MID and Class of STID



MODERNIZING, SIMPLIFYING,
DEVELOPING & DESIGNING

NEW SOLUTIONS

..... TO MEET

**CUSTOMERS' NEEDS &
STRENGTHEN THE VALUE OF MAIL**



ENHANCING

PROMOTIONS AND INCENTIVES



IMPROVING

CUSTOMER SERVICE



EDUCATING

THE NEXT GENERATION
OF MARKETERS



ENHANCING

PROMOTIONS AND INCENTIVES

USPS Marketing Mail

Marketing Mail and First-Class® Mail Products

First-Class® Mail Service

Registration Period

Promotion Period

PROMOTIONS	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
 TACTILE, SENSORY AND INTERACTIVE	 DEC 15		 FEB 1					JUL 31					
 EMERGING AND ADVANCED TECHNOLOGY		 JAN 15		 MAR 1					AUG 31				
 EARNED VALUE			 FEB 15	MAR 31		 APR 1		JUN 30					
 PERSONALIZED COLOR TRANSPROMO						 MAY 15		 JUL 1					DEC 31
 INFORMED DELIVERY®							 JUN 15		 AUG 1				DEC 31
 MOBILE SHOPPING <small>**Marketing Mail only</small>								 JUL 15		 SEPT 1			DEC 31

OVERVIEW

FEATURES



QUICK START

PROMOTION DETAILS

MAILING SUBMISSION
AND ACCEPTANCE

SUPPORT

2022 MOBILE SHOPPING PROMOTION

PROMOTION FEATURES:

Scan Image to Purchase

From Direct Mail to Direct Purchase

Quick Response (QR) codes, scannable images, and voice assistant commands can transport customers directly from mailpiece to online store. You can frame your logo with a dotless QR code, blend a visual QR code into your images, or integrate voice assistant commands to create mail that delivers high impact and drives sales.

Scan, Click, Purchase

Mobile Shopping

Capture a customer's attention with mail that puts purchases a few clicks away.

QR Code Voice Assistant AR Experience

2% DISCOUNT

[SEE PROMOTION DETAILS](#)

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PROMOTION DETAILS
MAILING SUBMISSION AND ACCEPTANCE
SUPPORT

2



Understand which technologies and techniques are eligible and the benefit each delivers to you.



IMPROVING

CUSTOMER SERVICE



MAILING PROMOTIONS PORTAL (IN PILOT)

BENEFITS

- Streamlined process due to the Portal
- Seamless submission of mailpieces and questions to USPS through new Portal tools
- Improved response times to inquiries due to increased staffing
- Streamlined reporting for USPS & the Customer
 - USPS can monitor inquiries and time which gives insights into staffing needs
 - Customer can maintain their records on the Portal's dashboard, such as any submitted requests, correspondence, and current status

MAILING PROMOTIONS PORTAL DASHBOARD

Mailing Promotions Portal



Search...

Search



User164850...

[Home](#) [Submit Mailpiece Request](#) [My Mailpiece Requests](#) [Ask a Question](#) [My Questions](#)

Submit Mailpiece Request



My Mailpiece Requests



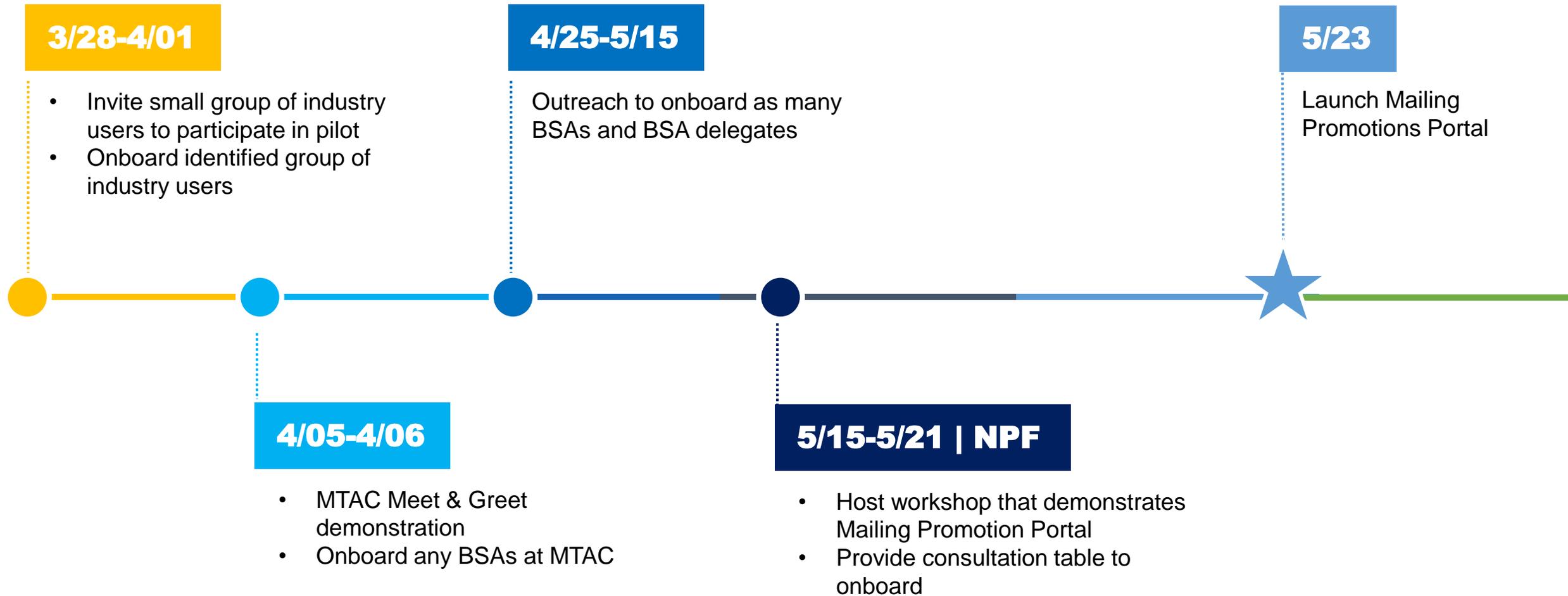
Ask a Question



My Questions



MAILING PROMOTIONS PORTAL TIMELINE





EDUCATING

NEXT GENERATION OF MARKETERS

2022 DIRECT EFFECT WHAT'S NEW?



The image shows the Direct Effect logo (a colorful diamond shape) and the Naval Aviation Museum Foundation logo (a stylized star and text) on the left. On the right is a photograph of a U.S. Navy fighter jet in flight against a dark, colorful background.

**Naval Aviation Museum
Competition**



The image features the text "MARKETING MADNESS" in white, bold, uppercase letters. A large, stylized green and blue triangle is positioned behind the text, pointing upwards.

**Marketing
Madness
Competition**



The image shows the FAMU logo, which consists of the letters "FAMU" in a large, bold, black font inside a white rectangular box. To the right of this box, the text "FLORIDA AGRICULTURAL AND MECHANICAL UNIVERSITY" is written in a smaller, black, uppercase font, enclosed in large square brackets.

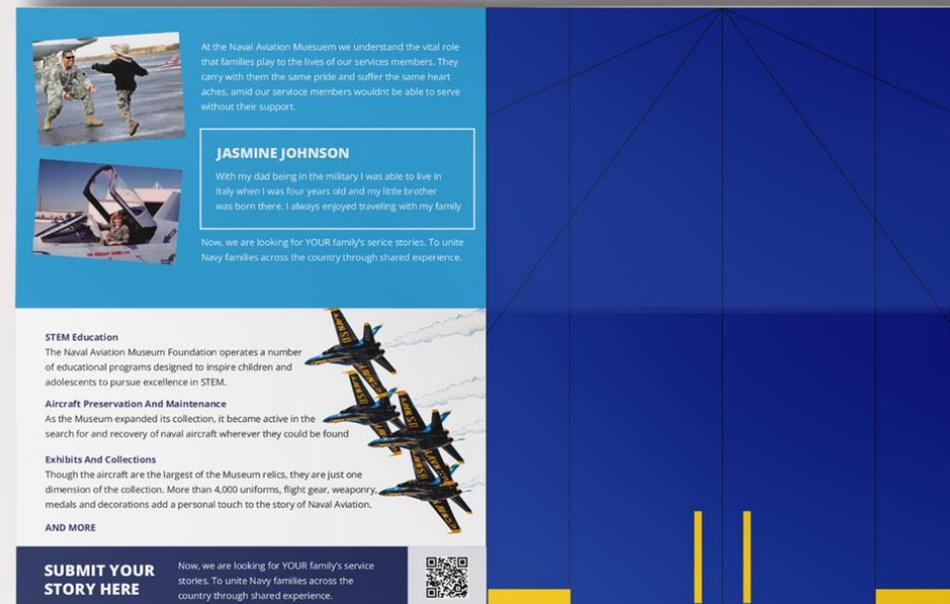
**FAMU Speaking
Engagement**

Direct Mail

The direct mail piece includes a punch-out paper Blue Angel airplane, and drives the audience towards the foundation's website. There, visitors can join or donate, as well as submit a story and image for use on social media channels.

WINNER OF THE INNOVATION CHALLENGE:

WILKES UNIVERSITY





776
CERTIFICATE
COMPLETIONS

141 Colleges & Universities



222
FACULTY
MEMBERS



5,338
STUDENTS

INNOVATION CHALLENGES

8 **+** **4** **=** **12**
IN-PERSON **VIRTUAL** **TOTAL CHALLENGES**

2 NATIONAL LAUNCHES FOR DIRECT EFFECT®
ONLINE MICRO-CREDENTIALS



Garrett Hoyt, VP, Technology Applications

Dimensions Requirements (Nonstandard / Noncompliance)

REQUIREMENTS – Before April 3, 2022

Dimensional data is required when packages are:

- greater than 1ft³, or
- when dimensional pricing applies as follows:
 - Priority Mail Express
 - Priority Mail
 - Parcel Select dimensional pricing (rectangular/non-rectangular)

Excludes USPS supplied Flat-Rate or Regional-Rate packaging

NEW REQUIREMENTS – After April 3, 2022

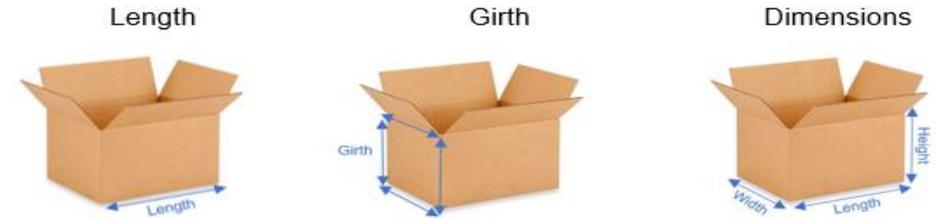
Non-standard fees and requirement for dimensional data disclosure will apply to Priority Mail Express, Priority Mail, Parcel Select, and Parcel Select Lightweight packages under the following conditions:

- Length is greater than 22" (length is the longest package dimension), or
- Length is greater than 30", or
- Cubic volume is greater than 2ft³

Non-compliance fees for dimensional data will apply when data is missing or incorrect when "sampled" and packages meets the following criteria:

- Length is greater than 22", or
- Cubic volume is greater than 1ft³

Excludes USPS supplied Flat-Rate or Regional-Rate packaging, USPS Returns, and PRS

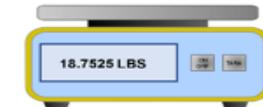


Dim Weight

$$\frac{\text{(Rectangular)} \quad L'' \times W'' \times H''}{166}$$

$$\frac{\text{(Non-Rectangular)} \quad L'' \times W'' \times H'' \times 0.785}{166}$$

Actual Weight



Cubic Volume

$$\frac{\text{(Rectangular)} \quad L'' \times W'' \times H''}{1,728}$$

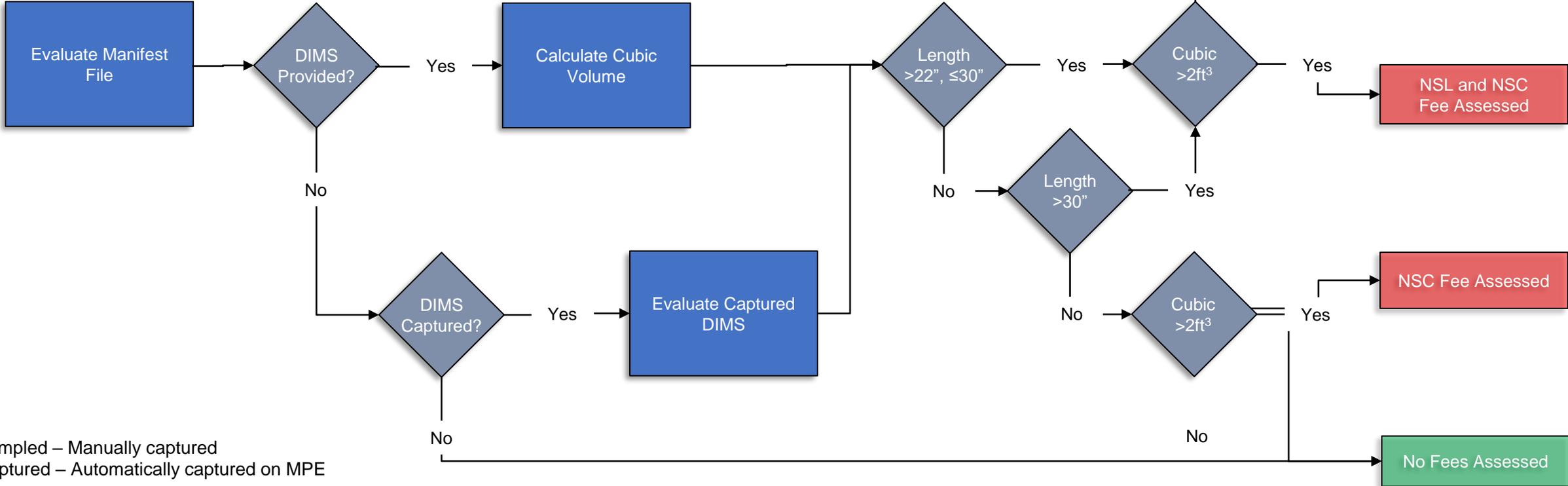
$$\frac{\text{(Non-Rectangular)} \quad L'' \times W'' \times H'' \times 0.785}{1,728}$$

Packages should not exceed 3,456 (2ft³)

Round off each measurement to the nearest whole inch

Nonstandard Fees

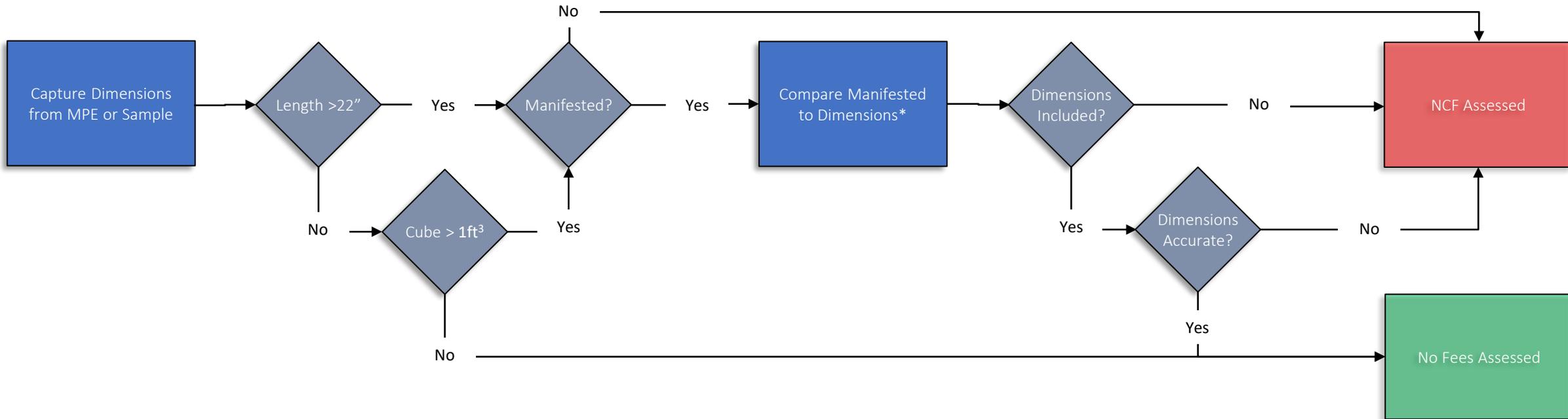
NonStandard Fee (NSF)	Entry Point	NonStandard Length (NSL)		NonStandard Cube (NSC)
		L > 22"	L > 30"	C > 2 ft ³
1. Evaluated by Manifest	Full Network	\$4.00	\$15.00	\$15.00
2. Reevaluated by Sampled or Captured Package Dimensions	DSCF or DNDC	\$3.00	\$11.25	\$15.00
	DDU	\$2.00	\$7.50	\$15.00



* Sampled – Manually captured
 * Captured – Automatically captured on MPE

Noncompliance Fees

Noncompliance Fee (NCF)	Noncompliance Length (NCL); Length >22"	Noncompliance Cube (NCC); Cube > 1 ft ³
Evaluated by Sampled or Captured Dimensions	Packages with missing/inaccurate dimensions exceeding length of 22" length or 1 ft ³ will be charged \$1.50 NCF	



* Sampled – Manually captured

* Captured – Automatically captured on MPE

Nonstandard and Noncompliance Data and Reporting

Fees	eVS reports*	eVS extracts	Enterprise Payment System
Nonstandard fees from manifest file	<ul style="list-style-type: none"> eVS postage statement Variance report (if there is a recalculated postage difference) 	<ul style="list-style-type: none"> Postage Statement Extract 	<ul style="list-style-type: none"> Commercial Mailing and Shipping Detail Report Transaction History Report
Nonstandard fees from sample	<ul style="list-style-type: none"> Incorrect Packaging Report Side-by-side Sampling Report 	<ul style="list-style-type: none"> Reconciliation Extract 	<ul style="list-style-type: none"> Transaction History Report
Noncompliance fee	<ul style="list-style-type: none"> Incorrect Packaging Report Side-by-side Sampling Report 	<ul style="list-style-type: none"> Reconciliation Extract 	<ul style="list-style-type: none"> Transaction History Report

Where can you see the fees for eVS?

Fees	Package Platform Reports	Package Platform Data Feeds	Enterprise Payment System
Nonstandard fees from manifest file			
Nonstandard fees from sample	<ul style="list-style-type: none"> Census Verification Report 	<ul style="list-style-type: none"> Census Attributes Data Feed 	<ul style="list-style-type: none"> Transaction History Report
Noncompliance fee			

Where can you see the fees for Package Platform?

Bulk Permit Balance Check

Customer Validation Tool Search

For the MSP to perform the MSP Balance Check the MSP will need to login into the BCG and navigate to Manage Account. Selecting the Manage Profile option.

The screenshot displays the Business Customer Gateway (BCG) interface. At the top, the header includes the USPS logo and the text "BUSINESS CUSTOMER GATEWAY". Navigation links for "Mailing Services", "Shipping Services", "HCR Services", and "Additional Services" are visible. A user profile section shows "Manage Account" with a dropdown menu open, highlighting "Manage Profile". Other options in the dropdown include "Manage Favorites", "Manage Services", "Manage Locations", "Manage Users", and "Log Out". The main content area features a "Welcome, Core MailerOne" message and a dropdown menu for account selection. Below this, there are sections for "Account Overview" (with a message about Enterprise Payment System access) and "Mailer Scorecard" (with a message about program participation). A "Mailing Report" link is located at the bottom right of the main content area. The URL at the bottom of the browser window is "https://gateway-cat.usps.com/eAdmin/action/preferences/editprofile".

Customer Validation Tool Search

In Manage Profile screen navigate to Mail Service Provider section and select the Customer Validation Tool

Home Business Location

[Terms & Conditions](#)

CORE MAILERONE
5143 ROSEMOUNT DR
WELDON SPRING, MO 63304-7581
UNITED STATES

Customer Registration ID (CRID) ⓘ
94542872

Mailer ID (MID) ⓘ
[View your Mailer IDs](#)

Add A Business Location

Does your business have more locations? Click to add additional locations to your account.

[Add Location](#)

Mail Service Providers

Get MID/CRID Assignments for your Customers.

[Get MIDs/CRIDs](#)

Validate your Client Business Information.

[Customer Validation Tool](#)

Customer Validation Tool Search

Gateway USPS.com Help Logout

 Business Customer Gateway

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

- CRID
- MID
- Permit Information
- Schedule ID
- Nonprofit
- Bulk Search
- Nonprofit Association Validation

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Within the Customer Validation Tool there are 2 ways to perform the balance check for EPS and Local Trust account information:

- Permit Information
- Bulk Search

Customer Validation Tool – Permit Information Search

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Permit Information

* indicates a required field.

Permit Number: *

Permit Type: *

Search By: City/State ZIP Code

City where Permit is Held: *

State where Permit is Held: *

Performing the Permit Information Search

- Enter the Permit Number
- Select Permit Type
- Search by City/State or Zip Code
 - By City/State
 - Enter the City
 - Select the State
 - By Zip Code
 - Enter the Zip Code
- Click the Search Button

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Customer Validation Tool – Permit Information Search

Permit Information Search Results

Account Number:	1000007133
Account Status:	ACTIVE
Account Balance:	\$5,891.16
Permit Number:	26
Permit Type:	PI
ZIP Code where Permit is Held:	20066-9998
Permit Status:	ACTIVE
CRID:	20101751 (Permit Linked)
Company Name:	PONESIT
Urbanization Code:	
Address Line 1:	100 E MARKET DR
Address Line 2:	
Address Line 3:	
City:	ARLINGTON
State/Province:	VA
ZIPCode/PostalCode:	22203-1553
Country:	UNITED STATES

Permit Information Search Results come back it will include the Account Number, Account Status and Account Balance.

- Account Number
 - Displays the EPS Account number or Local Trust account number
 - EPS Account number will be 10 digits long
- Account Status
 - Display for EPS Accounts Active, Inactive, Suspend, Pending, Pending_Closure
 - Local Trust will be blank
- Account Balance
 - If EPS account is a trust, then the balance will display.
 - If it is an ACH Debit account, then the word "Debit" will display
 - If EPS account is in Pending status, it will display N/A for Account Balance
- Disclaimer on the Search Results that the Account balance and Account Status is only a point in time and does not consider any postage statements currently in UPD status.
- If Permit Holder hasn't granted the MSP permission, then the Account Number, Accounts Balance or Account Status won't appear but a message to work with the Permit Holder.

Customer Validation Tool – Bulk Search

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Bulk Search

* indicates a required field.

Search Data Type: CRID MID Permit Nonprofit Authorization Number (NPA)

Result Data Elements: CRID MID Permit Nonprofit

Upload a File*:

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

Performing the Bulk Search will allow you to search multiple permits at the same time.

- Search Data Type needs to be Permit. If anything, else is selected the Balance information won't be returned
- Results Data Elements ensure Permit is selected.
- Upload a File – Browse for the Pipe Delimited file you want to use
- Search – Click button to begin the search
- Search History Results – Display your Search History, displays less than 25 files within the last 7 days
- Help (File Format) – Discuss format and process to create a Pipe Delimited text/flat file using Notepad and MS Excel

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Customer Validation Tool – Bulk Search

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Bulk Search

* indicates a required field.

Search Data Type: CRID MID Permit Nonprofit Authorization Number (NPA)

Result Data Elements: CRID MID Permit Nonprofit

Upload a File*: Browse... Search History Results Help (File Format)

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

Search Reset

Bulk Search Results

Please click the link for available download results.

Upload Time	Upload File	Download File
Apr 19, 2021 1:41:40 PM	CW_Sample_Permit_File_10202020.txt	Permit_2021419134240_184410.xlsx

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Once the Bulk Search Results are ready it will display the in the Bulk Search Results section. There will downloadable file with the results. The results will include:

- Account Number
 - Displays the EPS Account number or Local Trust account number
- Account Status
 - Display for EPS Accounts Active, Inactive, Suspend, Pending, Pending Closure
 - Local Trust will be blank
- Account Balance
 - If EPS account is a trust, then the balance will display.
 - If it is an ACH Debit account, then the word "Debit" will display
 - If EPS account is in Pending status, it will display N/A for Account Balance
- Disclaimer on the Search Results that the Account balance and Account Status is only a point in time and does not consider any postage statements currently in UPD status.
- If Permit Holder hasn't granted the MSP permission, then the Account Number, Accounts Balance or Account Status won't appear but a message to work with the Permit Holder.

Structure Change Process

Structure Change Process

- **Concept:** Increase industry engagement to **support technical specifications** for structural software changes with the goal of fostering collaboration for implementation approach, improving communication and providing regular updates including FAQs.
- **Approach:** Launch Early Vetting Group – Postal Early Exchange Committee (PEEC) which includes a cross-functional industry group that has representatives for mail.dat, mail.xml, SSF, transportation, different shapes, entry discounts
- **Current state:**
 - Various cross-functional industry group members have been identified
 - NDAs in progress
 - Meetings will be held bi-weekly
 - Once initial implementation approach finalized, and available to share externally – information will be shared with a larger group



Next Steps

- Meet bi-weekly
- Obtain feedback, update as needed and share with subsequent groups
- Finalize Release Overview and post on PostalPro
- Create FAQs based on Industry feedback