Full-Service Training

MAILER SCORECARD

Good [Morning, Afternoon] Welcome to a review of the Full-Service Program. We will begin with a review of the Full-Service Program. We will provide an overview of Full-Service Verifications, where the results can be found, and when the results may trigger additional postage assessments. Then, we will cover the other metrics that are found on the Electronic Verifications tab of the Mailer Scorecard. This will be followed with a review of the verification information you have learned thus far. We will end by covering the Mailer Scorecard and the reporting capabilities for Full-Service in greater detail.
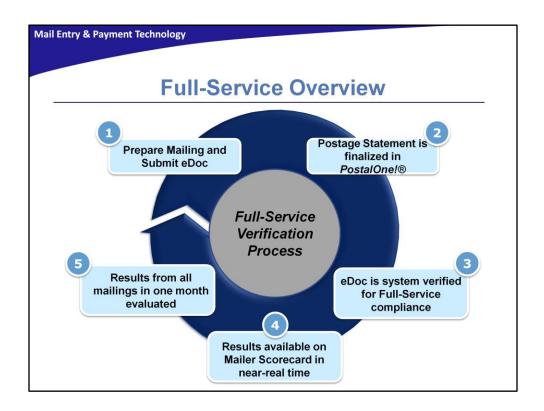
Full-Service sets the stage for the streamlined acceptance of commercial mailings. By submitting mailings as Full-Service both the USPS® and the mailer benefit from achieving end to end visibility into the mailpieces as they move from acceptance into processing.

Valuable information is provided when mailers prepare the electronic documentation known as an eDoc for a mailing. It includes the identification of the By/For relationship, that is to say who is the mail preparer and who the mail owner. There are many requirements that must be met to receive the Full-Service per piece discount. While Full-Service mailings still require "traditional" verifications performed as requested by Performance-Based Verification (PBV) automated verifications are also performed. In order to ensure that the mailings meet postal requirements, validations are performed on the eDoc information after mail acceptance. If errors are found during the validation process, they are reported through a report called the Mailer Scorecard, which is visible to both Mailers and Acceptance employees.

Established thresholds have been set for each of the requirements. If a mailer exceeds any of these established thresholds, they may be subject to an assessment charge equal to the removal of the per piece discount for each piece exceeding the threshold.

Full-Service is the first step in moving mailers towards a streamlined entry of mailings including Seamless Acceptance and eInduction. It is the "oil" that allows mailers to participate in various other programs including Mail Anywhere and other USPS promotions.

Mail quality evaluation is based on the electronic documentation (eDoc) submitted for all the mailings for a calendar month, rather than on a single mailing. The eDoc contains detailed information on each container, tray and mailpiece. In the Full-Service Verification process, a mailer would first prepare their mailing and submit their eDoc.

Mailing information, including the postage statement and qualification information, is represented electronically. This enables Acceptance employees to view mailings on the *PostalOne!®* dashboard rather than in hardcopy format. In the second step, the postage statement is finalized by *PostalOne!.*

In Step Three, multiple items in the eDoc are verified automatically by *PostalOne!*. For example, the barcodes in eDoc are checked for correct elements such as a Mailer ID. This verification is much more extensive than what we can do by selecting just a sample of mail for verification.

In Step Four, the results of the verifications results are published on Mailer Scorecard in near-real time. Finally i Step Five. The results from all of a mailer's mailings for one month are evaluated against the verification thresholds. With Full-Service, the USPS gets a much more complete view of the mailer's mail quality and the end result is better revenue assurance. The role of Mail Acceptance is to focus on assisting mailers to improve their overall mail quality.

Full-Service Overview

Mail Entry & Payment Technology

Intelligent Mail Barcodes

- **Mailpieces:** apply unique barcode to identify each postcard, letter and flat
- **Handling Units:** apply unique barcode on each tray, tub or sack
- **Containers:** apply unique barcode on placards for containers when required

Components of an IMb™ required for all Full-Service mail pieces

Barcode ID	Service Type	Mailer ID	Serial Number	Routing Code
Ex: "00" for Mixed AADC	Ex: "700" for First Class Mail	Ex: "123456" USPS assigned	Ex: "200890001" Mailer assigned	Ex: 6449 Amberview Ct., Memphis, TN 38141834649

eDoc

- Mailer submits postage statement information electronically
- Identifies eDoc Submitter, Mail Owner, and Mail Preparer/Mail Service Provider
- Includes detailed information for each piece, handling unit, and container

4 ways that mailers can submit eDoc:

Mail.dat™	Mail.XML™
Postal Wizard	Intelligent Mail Small Business Tool (IMsb)

As you may already know, unique barcodes are required for all mailpieces, handling units (trays, tubs and sacks), and containers. The eDoc contains detailed information about each piece, handling unit and container, as there is a corresponding barcode type for each. Pieces have Intelligent Mail barcodes (IMb™), handling units use Intelligent Mail tray barcodes (IMtb) and containers use Intelligent Mail container barcodes (IMcb).

Mailers submit mailing information, such as postage statements and qualification reports, electronically to the Postal Service. Electronic Documentation, also known as eDoc is required for all Full-Service mailings. Some key eDoc requirements include the identification of the Mail Owner and Mail Preparer (known as the By/For relationship in eDoc), the definition of a Mailer ID (MID), Customer Registration ID (CRID) and Service Type ID (STID) and how they are used in either the eDoc or the barcode. There are four ways that mailers can submit an eDoc, which are Mail.dat, Mail.XML, Postal Wizard or the Intelligent Mail Small Business Tool (IMsb).

Mail Entry & Payment Technology

Full-Service Verification Overview

Full-Service Verifications

☐ Some of the key elements in the eDoc used to measure Full-Service mail quality include:

- Mailer ID (MID)
- Service Type ID (STID)
- Barcode Uniqueness
- Entry Facility
- Identification of By/For relationship
- Tray linkage if preparing copal mailings

eDoc **Compares** **Full-Service Standards** **Results Communicated to** **Mailer Scorecard**

With Full-Service, mail quality is measured on a monthly basis through verifications. Verification is the process where USPS evaluates if a mailing meets certain established standards. This means that all eDocs submitted over a calendar month by a mailer or mail preparer are used to determine a mailer's mail quality.

The information that Full-Service verifies from the eDoc include the MID, STID, Barcode Uniqueness, Entry Facility, identification of the By/For relationship, and tray linkage if copal mailings are being prepared. We will define these terms in the coming slides, but it is important to know that each of these items must be correct in the eDoc for the mailing to be Full-Service compliant.

For measuring mail quality, USPS has set an acceptable amount of mailing errors in a month, called a threshold. A threshold is a value that USPS has designated as the point where a mailing has exceeded the acceptable level of error. Errors are measured over a calendar month and compared to the thresholds. If the verification error crosses a threshold, the Full-Service discount for the pieces in error will be removed. The Full-Service discount can only be removed once per piece. For example, if a First-class™ piece has a STID error and a By/For error, the piece would only lose the discount once. It is important to note that the majority of errors are caused by improper eDoc preparation. Regardless of the threshold for a verification, it is expected that mailers accurately pay for their mailpieces.

The Full-Service application compares the information contained in the eDoc against the standards that USPS has set pertaining to IMbs, IMtbs, and IMcbs. The results of these verifications are communicated on the Mailer Scorecard report.

Mail Entry & Payment Technology

What is the Mailer Scorecard?

| Mailer Profile | Electronic Verification | eInduction | Seamless |

- Provides dashboard view of results of letter and flat mailing activity with USPS over a calendar month

- Available for both eDoc submitter and Mail Owner

- Presents results of mail quality verifications across Full-Service, eInduction, and Seamless Acceptance initiatives

The Mailer Scorecard provides a dashboard view of the results of the letter and flat mailing activity with the Postal Service over a calendar month. This view is available to both the mailer who submitted the electronic documentation for the mailing (eDoc submitter) and the mail owner. The Mailer Scorecard is a MicroStrategy report that presents results of mail quality verifications across key initiatives including Full-Service, eInduction, and Seamless Acceptance. It includes four tabs: 'Mailer Profile', 'Electronic Verification', 'eInduction', and 'Seamless Acceptance'.

- **Mailer Profile Tab**: For mailers submitting letter and flat mail, this tab provides summary of volume by mail class, eDoc types, and total revenue in a month.
- **Electronic Verification Tab**: For mailers submitting eDoc, this tab provides results from Full-Service preparation requirements, Move Update compliance, and presort preparation requirements.
- **eInduction Tab**: For mailers participating in eInduction, this tab provides an overview of the number of containers on eInduction and number of eInduction validation errors.
- **Seamless Tab**: For mailers participating in Seamless Acceptance or Seamless Parallel, this tab provides an overview of the verification results including undocumented, nesting/sortation, delivery point validation, etc.

The Electronic Verification tab is where Full-Service mailing information is displayed.

Full-Service Verification Overview

Error Category	Verification Question
MID	Is the MID contained in the IMcb, IMtb, or IMb valid and registered with the USPS?
STID	Is the STID in the IMb valid and correct for the class and service level of the mailpiece?
By/For	Are the mail owner and mail preparer identified and accurate in the eDoc?
Barcode Uniqueness	Is the IMcb, IMtb, or IMb unique across all mailings from all mailers over the previous 45 days?
Entry Facility	Is the entry facility of the container or handling unit a valid USPS location?
Unlinked Copal	Was a tray/virtual sack that was marked for copalletization at origin submitted with eDoc for the tray/virtual sack on a pallet?

As you just learned, verifications are performed on the information contained in the eDoc submitted with Full-Service mailings. These eDoc verifications are performed on containers, handling units, which include trays and sacks, and mailpieces. Expanding upon what you learned on the previous screen, there are six questions that the Full-Service application is trying to answer in the verification process. These questions are tied to the six error types that you will learn about on the following slides. With each eDoc verification, the system is comparing the eDoc against the Full-Service requirements and answering a question about the mailing. If the answer to any of these questions is no, an error has occurred.

Each error category is trying to answer the following questions:

- MID: Is the MID contained in the IMcb, IMtb, or IMb valid and registered with the USPS?
- STID: Is the STID in the IMb valid and correct for the class and service level of the mailpiece?
- By/For: Are the mail owner and mail preparer identified and accurate in the eDoc?
- Barcode Uniqueness: Is the IMcb, IMtb, or IMb unique across all mailings from all mailers over the previous 45 days?
- Entry Facility: Is the entry facility of the container or handling unit a valid USPS location?
- Unlinked Copal: Was a tray/virtual sack that was marked for copalletization at origin submitted with eDoc for the tray/virtual sack on a pallet?

Now, we will introduce where all the error information is communicated to you and the mailer: the Mailer Scorecard report.

Full-Service Verification Overview

G1 Mail Entry & Payment Technology

Mailer Scorecard: Electronic Verification Tab

Volume Data
Container, handling unit, and piece count provided in eDoc

Full-Service Verifications
Results of verifications performed on information provided in eDoc

Other Electronic Verification Metrics
Additional program validations that do not currently result in additional postage assessment

Mailer Scorecard — MARCH 2016

Verifications

| Mailer Profile | Electronic Verification | eInduction | Seamless | SP |

○ # Metrics   ○ # Trending   ● % Metrics   ○ % Trending

Electronic Veri

eDoc Submitter	Total 94539993	Mailing Company B
# Containers processed for eDoc validations	187	187
# Handling Units processed for eDoc validations	484	484
# Bundles processed for eDoc validations	249	249
# Pieces processed for eDoc validations	45,743	45,743
# Full-Service Containers processed for eDoc validations	163	163
# Full-Service Handling Units processed for eDoc validations	460	460
# Full-Service Orphan Handling Units processed for eDoc validation	--	--
# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% Early Scheduled Ship Date Warnings	--	--
% Default Tray Barcode Warnings	N/A	N/A
% Unlinked Copal Tray Warnings	--	--
Move/Update Verifications		
Type of Move/Update verification	N/A	Automated
% COA Errors	1.96%	1.96%
Entry Point Validations – Info Only		
% eDoc/Appointment Entry Point Mismatch	--	--
% No Valid MDF Match	--	--
% Out of Date MDF Match	--	--
eDoc Nesting/Sortation Validations – Info Only		
% CSA Container Errors	--	--
% Minimum Piece Count/Weight Bundle Errors	--	--
% Rate Category Bundle Errors	--	--
% Destination ZIP Code HU Errors	--	--
% Depth of Sort HU Errors	--	--
% Minimum Piece Count/Weight HU Errors	--	--

The results of Full-Service verifications are compiled over a calendar month and are represented by specific mail preparation errors. These errors are reported as both a count of errors and as a percentage of errors on the Electronic Verification tab of the Mailer Scorecard. The Mailer Scorecard report is a versatile tool that is available to you, as well as the mail owner and the mailer's service provider.

The Mailer Scorecard displays information for the current month to-date and allows you to review a mailer's results from previous months. It is important to note that there is approximately a 72-hour delay for the most recent data to appear on the Mailer Scorecard. The Mailer Scorecard allows you and mailers to know if a threshold is exceeded, which may result in additional postage. In the context of Full-Service, additional postage means that the mailer would not receive the Full-Service discount that they initially claimed for those pieces above that designated threshold. As a reminder, a threshold is a value that USPS has designated as the point where a mailing has exceeded the acceptable level of error. Since error thresholds are evaluated by percentage, it is helpful to look at the Scorecard using the percent metrics view.

This report gives insight into the mailer's mail quality based on the established thresholds, and provides a rich amount of information on mail preparation quality. The intent for this report is to give mailers the information needed to understand what they are doing incorrectly, so that corrective actions can take place to improve mail quality. Ultimately, improved mail quality ensures that USPS's revenue is protected.

Mail Entry & Payment Technology

Full-Service Verifications

% MID Errors
(Container, HU, Piece)

What are they?

When the Mailer ID in the IMcb, IMtb, or IMb is not assigned by the USPS and is invalid, or cannot be found
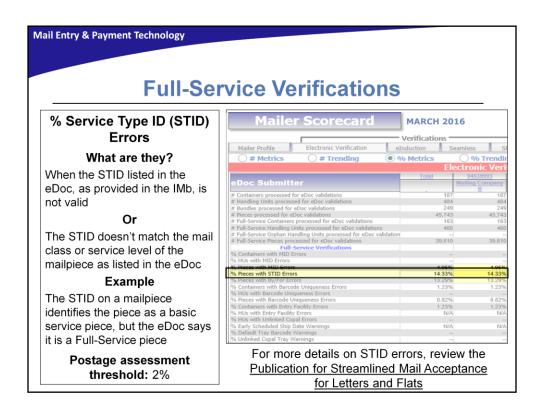
Example

An alleged MID contained in a IMcb, as listed in the eDoc, is found to not be assigned by the USPS

Postage assessment threshold: 2%

Mailer Scorecard   MARCH 2016

Verifications

Mailer Profile	Electronic Verification	eInduction	Seamless	S
○ # Metrics	○ # Trending	● % Metrics	○ % Trendir

Electronic Veri

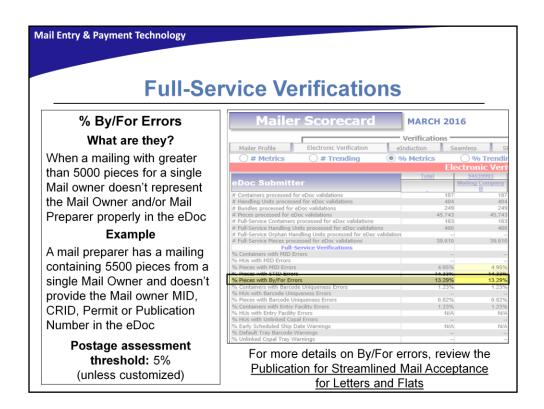| eDoc Submitter	Total	94539993 Mailing Company B
# Containers processed for eDoc validations	187	187
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# Pieces processed for eDoc validations	45,743	45,743
# Full-Service Containers processed for eDoc validations	163	163
# Full-Service Handling Units processed for eDoc validations	460	460
# Full-Service Orphan Handling Units processed for eDoc validation	--	
# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings	--	--

There are three MID verifications that occur to check that a valid MID is being used. These are the MID Container errors, MID Handling Unit errors, and MID Piece errors. A handling unit is a term used to describe trays, tubs, or bundles. The MID, is a unique 6 or 9-digit number issued by USPS that is a part of IMcbs, IMtbs and IMbs. The MID identifies the mail owner or mailing agent who has responsibility for the ownership, content, make up, or preparation of the mailing. A MID is always associated with a CRID, and multiple MIDs may be associated with the same CRID.

A MID Container, Handling Unit, or Piece error occurs when the Mailer ID in the eDoc for the IMcb, IMtb or IMb is not assigned by the USPS and is invalid, or cannot be found. An example would be if an alleged MID contained in an IMcb as listed in the eDoc is found to not be assigned by the USPS. For all MID errors, the postage assessment threshold is two percent. This verification is performed to ensure that mailers are using barcodes that meet all Full-Service requirements.

When any of the MID errors occur, the mailer should verify that the MID used is valid by checking that the MID exists in the system. The next step is to confirm with the mailer that the correct MID is placed in the proper field within the eDoc. It is important to note that mailers using Postal Wizard must check their reference materials, barcode lists, and other documentation to ensure that the information is correct in the IMb for each mailing.

Full-Service Verifications

% Service Type ID (STID) Errors

What are they?

When the STID listed in the eDoc, as provided in the IMb, is not valid

Or

The STID doesn't match the mail class or service level of the mailpiece as listed in the eDoc

Example

The STID on a mailpiece identifies the piece as a basic service piece, but the eDoc says it is a Full-Service piece

Postage assessment threshold: 2%

For more details on STID errors, review the Publication for Streamlined Mail Acceptance for Letters and Flats

A Service Type ID is a three-digit code in each IMb on the mailpiece that provides information on the mail class, address correction (if any), whether the mailing is Full-Service or Basic/Automation, and IMb tracing (if desired). A valid STID means that each of the barcodes in the eDoc has a correct Service Type Code. A STID error occurs when the STID listed in the eDoc, as provided in the IMb, is not valid. A STID error can also occur if the STID doesn't match the mail class or service level of the mailpiece as listed in the eDoc. An example of this error occurring is when the STID on a mailpiece identifies the piece as a basic service piece, but the eDoc says it is a Full-Service piece. The postage assessment threshold for STID errors is two percent. A common root cause for STID Piece errors is the misidentification of the mail class or service level. This verification is performed to ensure that mailers are using IMbs that meet all Full-Service requirements.

Full-Service Verifications

% By/For Errors

What are they?

When a mailing with greater than 5000 pieces for a single Mail owner doesn't represent the Mail Owner and/or Mail Preparer properly in the eDoc

Example

A mail preparer has a mailing containing 5500 pieces from a single Mail Owner and doesn't provide the Mail owner MID, CRID, Permit or Publication Number in the eDoc

Postage assessment threshold: 5%
(unless customized)

Mailer Scorecard — MARCH 2016

		Verifications			
Mailer Profile	Electronic Verification	eInduction	Seamless	S
○ # Metrics	○ # Trending	● % Metrics	○ % Trendin

Electronic Veri

eDoc Submitter	Total	94539993
		Mailing Company B
# Containers processed for eDoc validations	187	187
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# Bundles processed for eDoc validations	249	249
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# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings	--	--

For more details on By/For errors, review the
Publication for Streamlined Mail Acceptance
for Letters and Flats

For mailings that contain 5000 or more mailpieces for a single Mail Owner, there is an additional verification that must be performed. By/For information must be provided for the Mail Preparer and or Mail Owner. The Mail Preparer can be identified in the eDoc by either their MID or CRID. The Mail Owner can be identified in the eDoc by their MID, CRID, or Permit number/Publication number. A By/For error occurs when the Mail Owner and/or Mail Preparer is not provided in the eDoc, or if the information is not accurate. An example of this error type would be if a Mail Preparer has a mailing containing 5500 pieces from a single Mail Owner and doesn't provide the Mail owner MID, CRID, Permit or Publication Number in the eDoc. For By/For errors, the postage assessment threshold is five percent.

Please note that a custom By/For threshold can be set for a mailer who accepts more than five percent of volume from small mailers presenting less than 5000 pieces per day. To set a customized threshold, a review process must be conducted to validate the mailer's request for the customized threshold. The review will include a documentation review, and if necessary, an on-site review. For assistance with custom By/For thresholds, contact your local BMS Analyst.

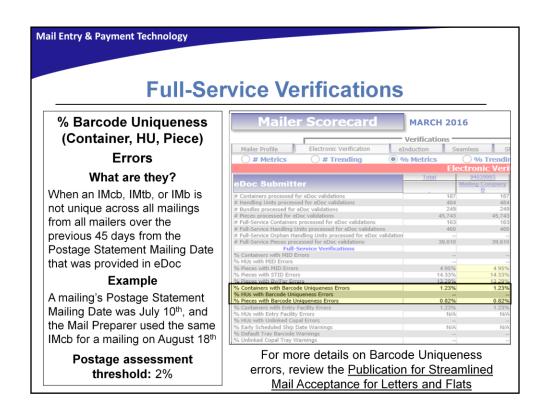# Full-Service Verifications

What causes By/For Errors?

1) Mail Owner/Preparer is invalid or missing.
   - Mail Owner/Mail Preparer was not identified in the eDoc
   - Mail Owner/Mail Preparer MID, CRID, or permit information provided in the eDoc was invalid
2) Mail Owner and Mail Preparer were identified in the eDoc as the same business entity
3) Mail Owner CRID or permit/MID associated to the CRID was used to identify a Mail Preparer in an eDoc within the past 90 days

Here is a detailed list of explanations for why By/For errors occur. One reason for By/For errors occurring is when there is no Mail Owner or Mail Preparer identified in the eDoc. This means that either the Mail Owner/Mail Preparer MID, CRID or permit information provided in the eDoc was not valid or the Mail Owner/Mail Preparer was not identified in the eDoc. Another reason is when the Mail Owner and Mail Preparer identified in the eDoc are both the same business entity. A third explanation for By/For errors is if the CRID or permit/MID associated to the CRID was used to identify a Mail Preparer in an eDoc within the past 90 days.

It's important to note that USPS does track exceptions within *PostalOne!* for companies that meet the definition of a mail owner and who prepare and enter their own mail. These mailers should not receive a By/For Error. This exception occurs for companies who exclusively prepare their own mailings; not mail service providers who mostly prepare mail for other companies and occasionally mail for themselves.

If you believe your mailer is receiving this error incorrectly, please contact the *PostalOne!* Help Desk.

For more information on the By/For verification, please see the By/For Factsheet on PostalPro™.

Full-Service Verifications

% Barcode Uniqueness (Container, HU, Piece) Errors

What are they?

When an IMcb, IMtb, or IMb is not unique across all mailings from all mailers over the previous 45 days from the Postage Statement Mailing Date that was provided in eDoc

Example

A mailing's Postage Statement Mailing Date was July 10th, and the Mail Preparer used the same IMcb for a mailing on August 18th

Postage assessment threshold: 2%

Mailer Scorecard — MARCH 2016

Verifications

Mailer Profile	Electronic Verification	eInduction	Seamless	S...
○ # Metrics	○ # Trending	● % Metrics	○ % Trendin...	

Electronic Veri...

eDoc Submitter	Total	94539993 Mailing Company B
# Containers processed for eDoc validations	187	187
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% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings	--	--

For more details on Barcode Uniqueness errors, review the Publication for Streamlined Mail Acceptance for Letters and Flats
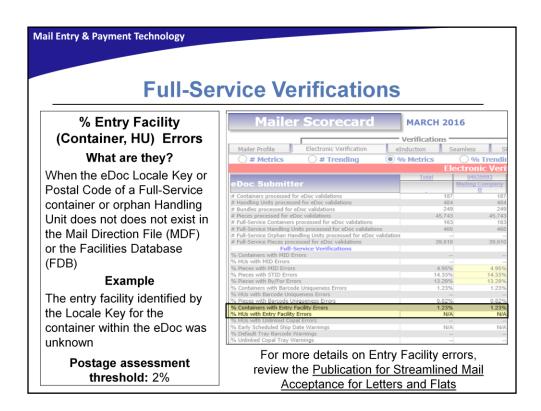

There are three barcode uniqueness verifications that occur in Full-Service; Barcode Uniqueness Container errors, Barcode Uniqueness Handling Unit errors, and Barcode Uniqueness Piece errors. Each verification checks that the IMcb, IMtb, or IMb listed in the eDoc was not used more than once within 45 days of the Postage Statement Mailing Date within the same mailing and CRID, across mailings and CRIDs, or across mailings within the same CRID. Another way to describe Barcode Uniqueness errors is if a barcode was not unique across all mailings for that mailer or across all mailings from all mailers for the past 45 days.

An example of this error type would be if a mailing's Postage Statement Mailing Date was July 10th, and the Mail Preparer used the same IMcb for a mailing on August 18th. The postage assessment threshold for Barcode Uniqueness errors is 2 percent. This verification is performed so that the USPS can identify each container, HU, or mailpiece accurately within the 45-day window.
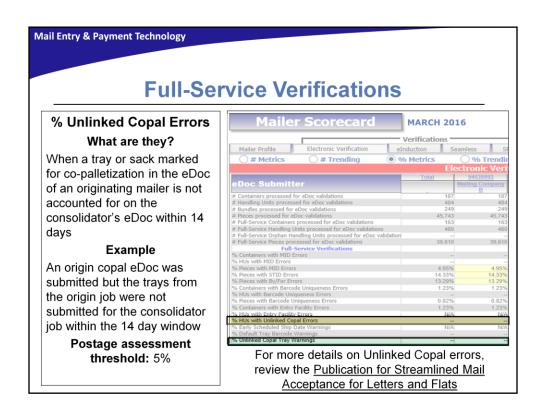
One exception to this rule applies to small mailings that have fewer than 10,000 pieces, where postage is affixed to each piece at the correct price or each piece is of identical weight and the mailpieces are separated by price. In this case, the same serial number can be used for all pieces in the mailing and uniqueness is required for the serial number only at the mailing level. This exception applies to all three Barcode Uniqueness errors; container, handling unit, and piece.

It is important to note that the MID, Serial Number, and Mail Class from the STID define a unique IMb. If the same MID and Serial Number are used on two mailpieces with two different STIDs that indicate the same class of mail (for example First-Class STIDs 314 and 320), those pieces will be flagged as non-unique.

Full-Service Verifications

% Entry Facility (Container, HU) Errors
What are they?
When the eDoc Locale Key or Postal Code of a Full-Service container or orphan Handling Unit does not does not exist in the Mail Direction File (MDF) or the Facilities Database (FDB)
Example
The entry facility identified by the Locale Key for the container within the eDoc was unknown
Postage assessment threshold: 2%

Mailer Scorecard   MARCH 2016

Verifications

Mailer Profile	Electronic Verification	eInduction	Seamless	Se
○ # Metrics	○ # Trending	⦿ % Metrics	○ % Trendin

Electronic Veri

eDoc Submitter	Total	94539993 Mailing Company B
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# Handling Units processed for eDoc validations	484	484
# Bundles processed for eDoc validations	249	249
# Pieces processed for eDoc validations	45,743	45,743
# Full-Service Containers processed for eDoc validations	163	163
# Full-Service Handling Units processed for eDoc validations	460	460
# Full-Service Orphan Handling Units processed for eDoc validation	--	--
# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings	--	--

For more details on Entry Facility errors, review the <u>Publication for Streamlined Mail Acceptance for Letters and Flats</u>

There are two entry facility verifications that occur in Full-Service; Entry Facility Container Errors and Entry Facility Handling Unit Errors. An Entry Facility error occurs when the eDoc Locale Key or Postal Code of a Full-Service container or orphan handling unit does not exist in the Mail Direction File (MDF) or the Facilities Database (FDB). The term "Locale Key" refers to an alphanumeric code assigned to each entry facility listed in the Mail Direction File. An orphan handling unit is a tray or sack that is not placed in a higher level container. The Facilities Database is the master facility file for the USPS, where every facility that handles mail has a locale key and a physical ZIP Code™. The Mail Direction File is a file specific to mailings eligible for drop shipments, which tells you where to deliver a mailing.

 An example of an Entry Facility error would be if the entry facility identified by the Locale Key for the container within the eDoc was unknown. For Entry Facility errors, the postage assessment threshold is two percent.
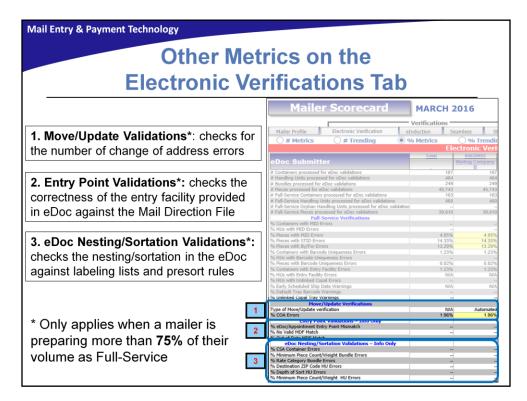
Mail Entry & Payment Technology

Full-Service Verifications

% Unlinked Copal Errors

What are they?

When a tray or sack marked for co-palletization in the eDoc of an originating mailer is not accounted for on the consolidator's eDoc within 14 days

Example

An origin copal eDoc was submitted but the trays from the origin job were not submitted for the consolidator job within the 14 day window

Postage assessment threshold: 5%

Mailer Scorecard   MARCH 2016

Verifications

Mailer Profile	Electronic Verification	eInduction	Seamless	S
○ # Metrics	○ # Trending	◉ % Metrics	○ % Trendin	

Electronic Veri

eDoc Submitter	Total	94539993 Mailing Company B
# Containers processed for eDoc validations	187	187
# Handling Units processed for eDoc validations	484	484
# Bundles processed for eDoc validations	249	249
# Pieces processed for eDoc validations	45,743	45,743
# Full-Service Containers processed for eDoc validations	163	163
# Full-Service Handling Units processed for eDoc validations	460	460
# Full-Service Orphan Handling Units processed for eDoc validation	--	--
# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings	--	--

For more details on Unlinked Copal errors, review the Publication for Streamlined Mail Acceptance for Letters and Flats

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Copalletization is a program which allows origin mailers to have mailings verified and ship their trays/bundles after postage has been paid to an authorized consolidator to be combined with other trays or bundles on pallets to receive destination entry prices. When authorized by Business Mailer Support, copal trays may be shipped to an authorized consolidator prior to postage payment. An origin mailer may also be an approved consolidator within their own facility. Copal Mailings are unique in that they have an eDoc submitted by both the origin facility and consolidator to describe the movement of trays and sacks. It is important to note that not every BMEU has a copal mailer.

An Unlinked Copal error occurs when trays or virtual sacks marked for co-palletization in the eDoc of an originating mailer is not accounted for on the consolidator's eDoc within 14 days. Unique to Copal errors, there is a Copal warning as indicated by the green line highlight on the Mailer Scorecard. These occur when a mailer has marked a job as co-palletized in the Origin Job, but the tray or bundle has not been included on a Consolidator Job. The consolidator has 14 days to submit the Consolidator Job or the warning will escalate to a Copal error. After 14 days, the warning turns to a Copal error because the mailer did not submit the Consolidator Job for co-palletized mailings. If the consolidator does not submit the Consolidator Job in the eDoc, then the mailing is not considered to be complete, as there is no pallet information.
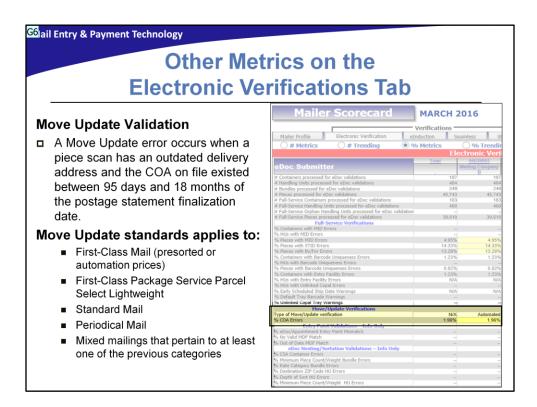
An example of an Unlinked Copal error occurs when an origin copal eDoc was submitted but the trays from the origin job were not submitted on the consolidator eDoc within the 14-day window. The postage assessment threshold for Unlinked Copal errors is five percent. This verification is performed to ensure that the trays are linked to the container

properly for a mailing.

Other Metrics on the Electronic Verifications Tab

1. Move/Update Validations*: checks for the number of change of address errors

2. Entry Point Validations*: checks the correctness of the entry facility provided in eDoc against the Mail Direction File

3. eDoc Nesting/Sortation Validations*: checks the nesting/sortation in the eDoc against labeling lists and presort rules

* Only applies when a mailer is preparing more than **75%** of their volume as Full-Service

Mailer Scorecard — MARCH 2016

Verifications: Mailer Profile | Electronic Verification | eInduction | Seamless | S

○ # Metrics   ○ # Trending   ◉ % Metrics   ○ % Trendin

Electronic Veri

eDoc Submitter	Total	Mailing Company B
# Containers processed for eDoc validations	187	187
# Handling Units processed for eDoc validations	484	484
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# Full-Service Orphan Handling Units processed for eDoc validation		
# Full-Service Pieces processed for eDoc validations	39,610	39,610
Full-Service Verifications		
% Containers with MID Errors	--	--
% HUs with MID Errors	--	--
% Pieces with MID Errors	4.95%	4.95%
% Pieces with STID Errors	14.33%	14.33%
% Pieces with By/For Errors	13.29%	13.29%
% Containers with Barcode Uniqueness Errors	1.23%	1.23%
% HUs with Barcode Uniqueness Errors	--	--
% Pieces with Barcode Uniqueness Errors	0.82%	0.82%
% Containers with Entry Facility Errors	1.23%	1.23%
% HUs with Entry Facility Errors	N/A	N/A
% HUs with Unlinked Copal Errors	--	--
% Early Scheduled Ship Date Warnings	N/A	N/A
% Default Tray Barcode Warnings	--	--
% Unlinked Copal Tray Warnings		
Move/Update Verifications		
Type of Move/Update verification	N/A	Automated
% COA Errors	1.96%	1.96%
Entry Point Validations – Info Only		
% eDoc/Appointment Entry Point Mismatch	--	--
% No Valid MDF Match	--	--
% Out of Date MDF Match		
eDoc Nesting/Sortation Validations – Info Only		
% CSA Container Errors	--	--
% Minimum Piece Count/Weight Bundle Errors	--	--
% Rate Category Bundle Errors	--	--
% Destination ZIP Code HU Errors	--	--
% Depth of Sort HU Errors	--	--
% Minimum Piece Count/Weight HU Errors	--	--

There are additional fields on the Electronic Verification tab that are not directly related to the Full-Service verifications that you have just learned about. Although this information appears on the Electronic Verification tab of Mailer Scorecard, these validations are for informational purposes only. We will briefly cover these additional fields so that you have a greater understanding of the Intelligent Mail program as a whole.

1. Move/Update Validation: This validation checks for the number of change of address errors for mailers providing more than 75 percent of their volume as Full-Service.

2. Entry Point Validations: This validation checks the correctness of the USPS entry facility in the eDoc against the Mail Direction File for mailers providing more than 75 percent of their volume as Full-Service. This validation ensures the entry point in the eDoc is valid for the combination of container, destination, and entry discount based on the Induction date of the container.

3. eDoc Nesting/Sortation Validations: This validation checks the nesting/sortation in the eDoc against labeling lists and presort rules for mailers providing more than 75 percent of their volume as Full-Service. Mailers have their eDocs checked against Domestic Mail Manual (DMM) requirements and active labeling lists. This validation checks if the bundles, trays, sacks, or containers in the eDoc were created as required by the DMM and active labeling lists were used, based on the postage statement mailing date. This includes checks for depth-of-sort, minimum piece counts, weights, and rates paid.

The Move Update standard is a means of reducing the number of mailpieces in a commercial mailing that require forwarding, returning, or treating as waste by regularly matching a mailer's address records with change-of-address orders maintained by the Postal Service. The Move Update standards applies to the following mail classes: First-Class Mail presorted or automation prices, First-Class Package Service, Parcel Select Lightweight, Standard Mail, Periodical Mail, and Mixed mailings that pertain to at least one of the previous categories. USPS advises all mailers to keep their mailing address list current, regardless of mail class, in order to reduce undeliverable mail and operational strain.

A Move Update error occurs when a piece scan has an outdated delivery address and the COA on file existed between 95 days and 18 months of the postage statement finalization date. Please reference the Move Update Training for additional information on the Move Update standard.

Full Service Verification Error Information

Error Category	Error Type	Threshold	Description
Valid MID	MID Container	2%	The MID in the IMcb was not assigned by the USPS, and is invalid, or cannot be found
	MID Handling Unit	2%	The MID in the IMtb was not assigned by the USPS, and is invalid, or cannot be found
	MID Piece	2%	The MID in the IMb was not assigned by the USPS, and is invalid, or cannot be found
Valid STID	STID	2%	The STID in the IMb is missing or not valid and correct for the class and service level of the mailpiece
By/For	By/For	5%	The Mail Owner and Mail Preparer are not identified and accurate in the eDoc
Unique Barcode	Barcode Uniqueness-Container	2%	The IMcb is not unique across all mailings from all mailers over the previous 45 days from the Postage Statement Mailing Date that was provided in eDoc
	Barcode Uniqueness-Handling Unit	2%	The IMtb is not unique across all mailings from all mailers over the previous 45 days from the Postage Statement Mailing Date that was provided in eDoc
	Barcode Uniqueness - Piece	2%	The IMb is not unique across all mailings from all mailers over the previous 45 days from the Postage Statement Mailing Date that was provided in eDoc
Entry Facility	Entry Facility Container	2%	The eDoc Locale Key or Postal Code of a Full-Service container does not exist in the Mail Direction File (MDF) or the Facilities Database (FDB)
	Entry Facility Handling Unit	2%	The eDoc Locale Key or Postal Code of a Full-Service orphan Handling Unit does not exist in the Mail Direction File (MDF) or the Facilities Database (FDB)
Unlinked Copal	Unlinked Copal	5%	When a tray or sack marked for co-palletization in the eDoc of an originating mailer is not accounted for on the consolidator's eDoc within 14 days

DISTRIBUTE THE SLIDE AS A HANDOUT!!!!!!!!!

Before moving on to the reporting section of the course, lets review some of the key information about each Full-Service error type. You should be able to identify these different verification errors and where to view them on the Mailer Scorecard.

For measuring mail quality, USPS has set an acceptable amount of mailing errors in a month, called a threshold. As you learned, thresholds are the values that USPS has designated as the point where a mailing has exceeded the acceptable level of error. If the verification error crosses a threshold, the Full-Service discount for the pieces in error will be removed. The Full-Service discount can only be removed once per mailpiece. Regardless of the threshold for a verification, it is expected that mailers accurately pay for their mailpieces.
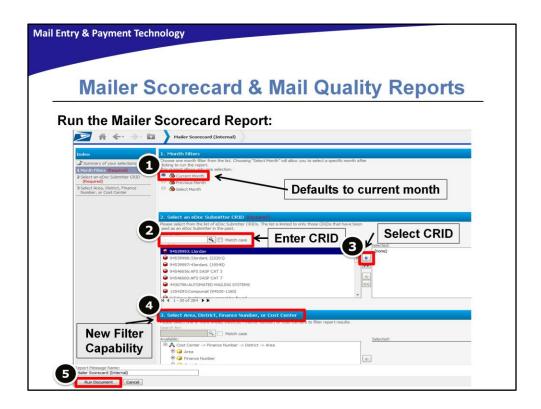
Please take a moment to review the information associated with each verification.

Unlike Acceptance employees, mailers access the Mailer Scorecard through the Business Customer Gateway (BCG)*.* First, a mailer must enter their log-in credentials in the sign-in box on the landing page. Mailers will know they've successfully logged onto the platform when they see the welcome bar on the left side of their screen and their favorite services on the right of their screen as shown in Step Two.

In the BCG, there are two ways to access the Mailer Scorecard. On the left of the screen the mailer clicks on Mailing Services, then Mailing Reports. However, if Mailing Reports appears on the right under Favorite Services, then the mailer can use that route as well. Either method gets you to Step Three shown at the bottom of this page. From here, they would select "Mailer Scorecard."

In Step Four, **the mailer will select if they are an eDoc Submitter or a Mail Owner/Mail Preparer. Now we will walk through how to generate the Mailer Scorecard report. The steps from here are the same for both internal and external users.**

Mailer Scorecard & Mail Quality Reports

Run the Mailer Scorecard Report:

Once you have accessed the Mailer Scorecard, here are the steps to run the report. In Step One, the Scorecard, by default, will filter data from the current month; however, the previous month can be selected and viewed by choosing "Previous Month" in the "Month Filters" section. Choosing the "Select Month" option will allow you to specify which month you want to view after running the report. Keep in mind that running the report with current month selected when it is early in the month will result in minimal data on the report.

Once you have selected a month filter, enter the mailer's CRID in the box shown in Step Two and click on the search button, which looks like a magnifying glass. If you don't know the mailer's CRID, you can find it in *PostalOne!* under Balance and Fees. This process is covered in the Full-Service Business Customer Gateway (BCG) LMS course, number 10022680.

When the CRID pops up as available in the list, move it to the box on the right side of the page by clicking on the right arrow (see Step Three on the screen).

Step Four is optional, but you can filter your results by Area, District, Finance Number, or Cost Center. However, since a CRID is required, unless you pick the area, district, etc., that the CRID is in, no data will be returned.

In Step Five click "Run Document" and the Mailer Scorecard appears.

Additional Resources

Getting Started with Intelligent Mail

http://beta.postalpro.usps.com/mailing#cat-subsection-0

Business Customer Gateway

https://gateway.usps.com/eAdmin/view/signin

Publication for Seamless Acceptance for Letters and Flats

http://beta.postalpro.usps.com/node/581

Contact your local Business Mail Entry Unit for assistance!

https://ribbs.usps.gov/locators/find-bme.cfm

- Mail.dat Technical Specification is a technical guide that outlines steps for exchanging electronic data with the *PostalOne!®* system using the Mail.dat® format.
- The Mail.XML Technical Specification is a comprehensive technical guide that outlines steps for exchanging electronic data with the *PostalOne!®* system using the Mail.XML® file format.