LABOR RELATIONS

UNITED STATES POSTAL SERVICE

April 23, 2018

Mr. Brian J. Wagner
President
National Association of Postal Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Certified Mail Tracking Number:
7016 1370 0002 3014 3327

Dear Brian:

This letter is in further reference to prior notifications regarding the evaluation of the Mailing Requirements Clerk (MRC), Bulk Mail Clerk, and Bulk Mail Technician positions and the piloting of an MRC Help Desk.

As previously informed by letter dated August 25, 2017 (enclosed), the Postal Service conducted an evaluation of the above referenced positions to ensure the continued application and alignment of the job duties, roles, and responsibilities of these positions related to the workload associated with the Business Mail Entry Units (BMEUs).

As a result of the evaluation, the Postal Service has developed Mail Acceptance Workflows specific to various duties/responsibilities for Bulk Mail Clerks and Bulk Mail Technicians. In order to assess the effectiveness of the work instructions, the Postal Service is planning to issue them in the same Districts where the previous evaluations occurred and conduct additional job observations of clerks in the performance of their duties. Based on the observations, the workflows may be adjusted accordingly. Once the workflows are finalized, the Postal Service intends to issue them nationwide. Enclosed are the Mail Acceptance Workflows that will be issued prior to the observations.

Additionally, the Union was notified by letters dated August 25, 2017, and March 6 (enclosed), that the Postal Service was piloting an MRC Help Desk, including a process for MRCs to track and document their customer interactions. The Postal Service plans to conduct additional observations in the previously identified Districts with the intent of developing workflows for MRC workload. MRCs will be expected to enter all work performed into the ServiceNow platform.

Those MRCs who are staffing the Help Desk (approximately two per pilot District), will be using a Genysis system to track and assist with their customer interactions. This is the same system that is used in the Customer Care Centers and the Customer Retention Sites. For quality and training purposes, the system has the capability to record calls and capture screen shots supporting the call. The Postal Service plans to enable this capability for the MRC Help Desk.

475 L'ENFANT PLAZA SW
WASHINGTON DC 20260-4100
WWW.USPS.COM

(CA2018-159)

A meeting regarding the evaluations was held with the APWU on September 11, 2017. During the meeting, Lamont Brooks, Assistant Director, Clerk Craft, requested that Richard Haefner be involved with the evaluations. The Postal Service will continue to involve Mr. Haefner in the above referenced observations.

Please contact Shannon Richardson at extension 5842 if you have any questions concerning this matter.

Sincerely,

Rickey R. Dean
Manager
Contract Administration (APWU)

Enclosures

(CA2018-159)

LABOR RELATIONS

UNITED STATES POSTAL SERVICE

March 6, 2018

Mr. Brian J. Wagner
President
National Association of Postal Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Certified Mail Tracking Number:
7016137000230142573

Dear Brian:

This letter is in further reference to the Postal Service pilot regarding Mailing Requirement Clerks (MRC) tracking and documenting their customer interactions. Notification of this pilot was provided to the Union by letter dated August 25, 2017 (enclosed).

In those districts that have been included in the above referenced pilot, the Postal Service is planning to pilot a MRC Help Desk, with customer access through a 1-800 number. The MRC Help Desk will include utilizing approximately two MRCs per district. The pilot is scheduled to begin the week of March 26 and continue through the end of the fiscal year. Training will be provided to MRCs on the MRC Help Desk prior to beginning the pilot.

Please contact Shannon Richardson at extension 5842 if you have any questions concerning this matter.

Sincerely,

Rickey R. Dean
Manager
Contract Administration (APWU)

Enclosure

475 L'ENFANT PLAZA SW
WASHINGTON DC 20260-4101
WWW.USPS.COM

(CA2018-87)

2018

Mail Acceptance Workflows

STREAMLINED WORK INSTRUCTIONS FOR COMMERCIAL MAIL ACCEPTANCE THROUGH THE BUSINESS MAIL ENTRY UNIT

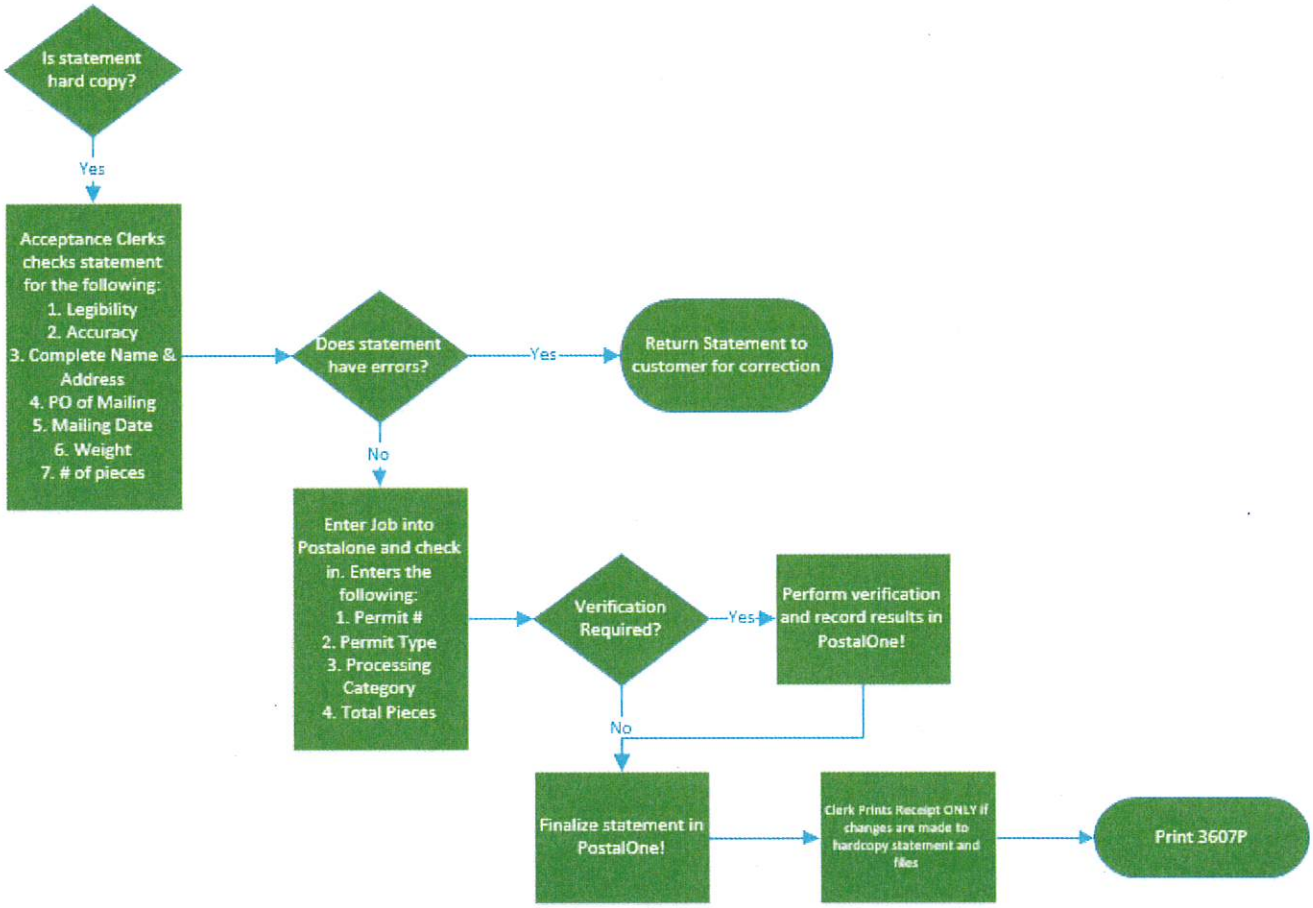
Mail Acceptance Workflows – BMEU

Overview

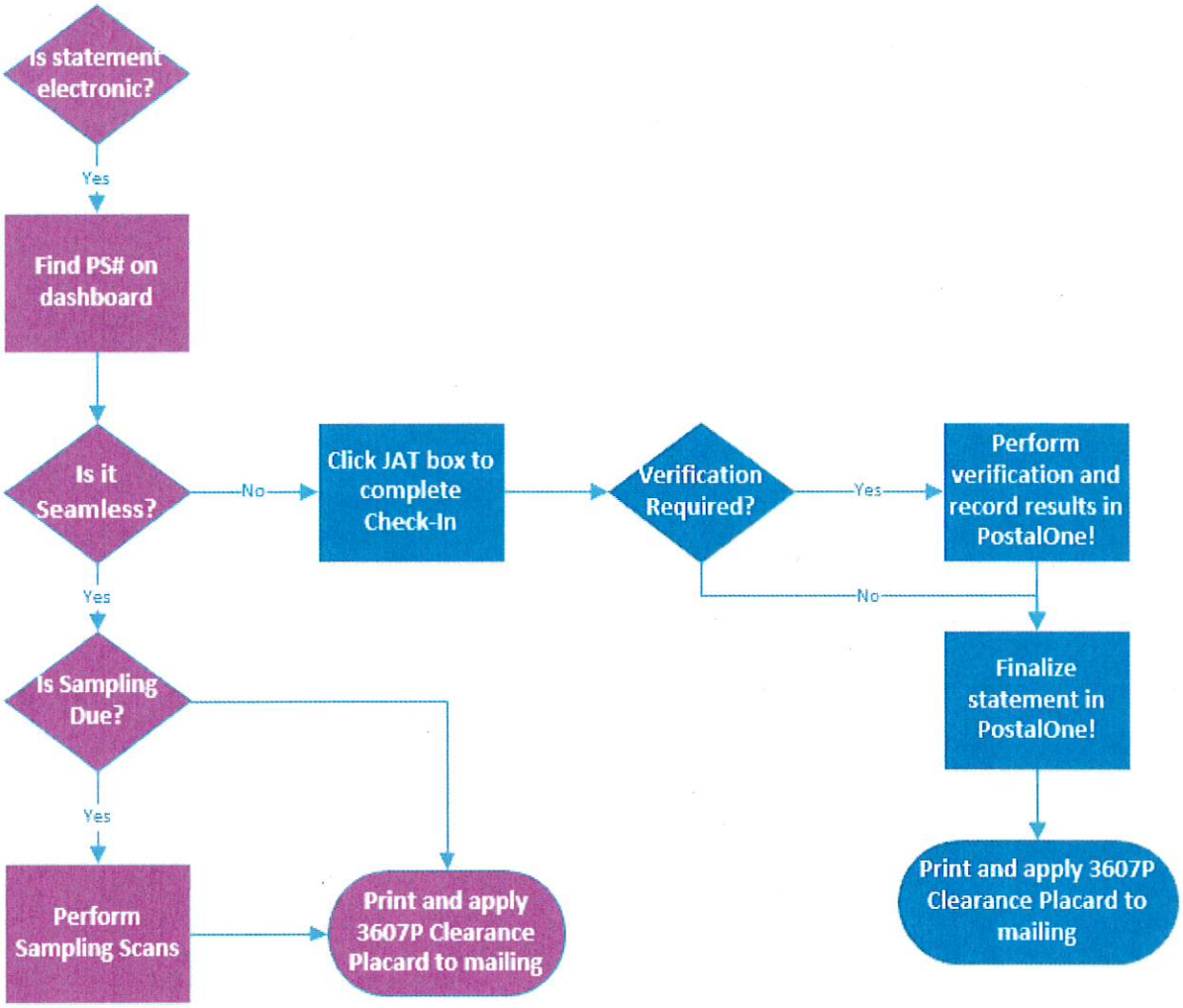
This document provides the workflow for each type of mailing presented by a customer at the Business Mail Acceptance Unit. Workflows for mailings are broken down by Postage Statement submittal method (hardcopy, electronic) and type of mailing (basic, full service, seamless parallel, seamless, eVS).

Description of mailings

Hardcopy statements: mailings presented with Hardcopy statements-see flow below in green- follow Hardcopy Postage Statement Flow page 6



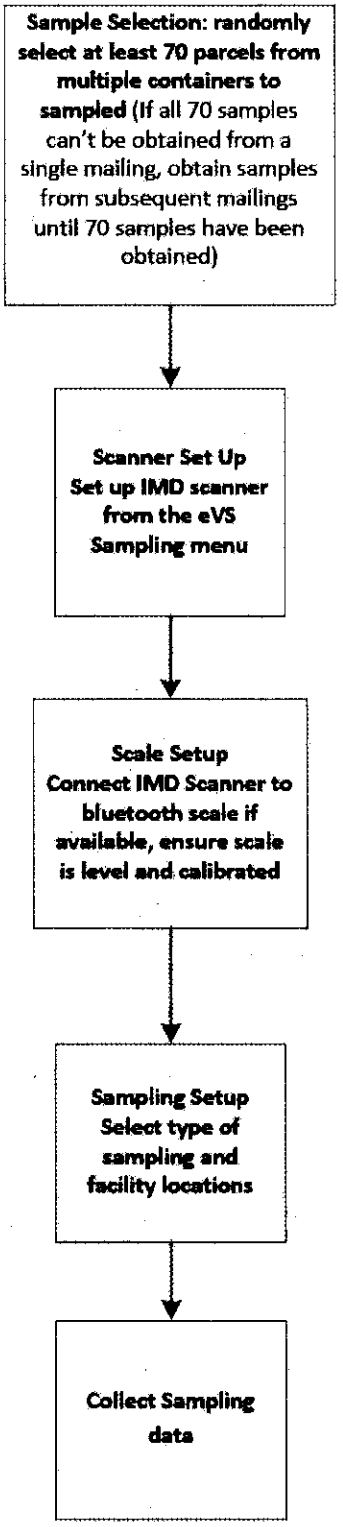
Electronic statements (including Seamless): mailings already on Postalone Dashboard (Electronic Postage Statement) See flow below in Blue- follow Electronic Postage Statement Flow page 7



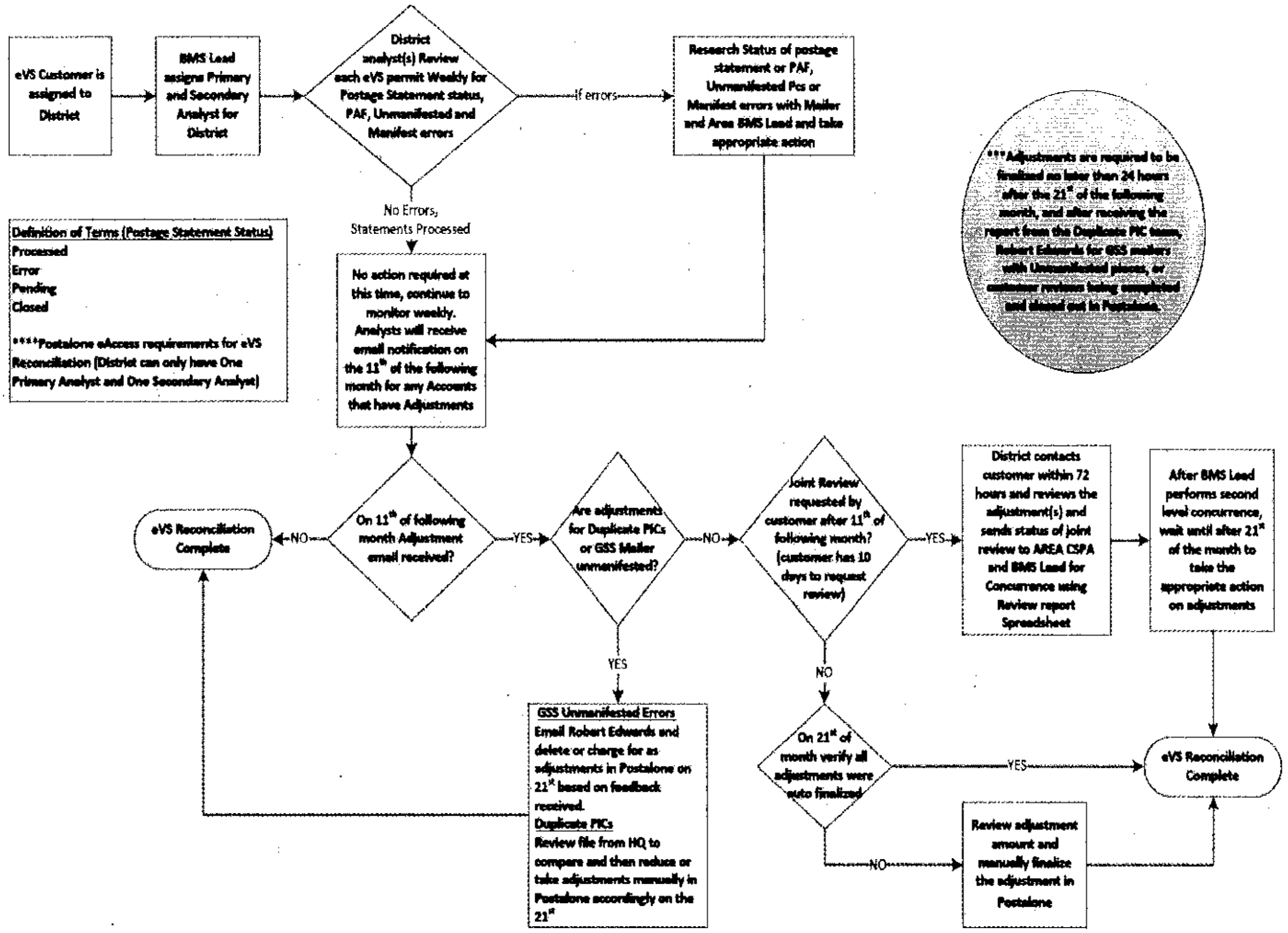
- IMsb Tool- follow Electronic Postage Statement Flow page 7
- Postal Wizard follow Electronic Postage Statement Flow page 7; this process Flow includes the following types of mailings:
    - Basic
    - Full Service
    - Seamless Parallel
- Mail.dat/Mail.xml statements: follow Electronic Postage Statement Flow page 7; this process Flow includes the following types of mailings:
    - Basic
    - Full Service
    - Seamless Parallel

Seamless Mailings: (see flow above in Purple) follow Seamless Mailing Flow page 8

eVS Sampling Process Flow- follow eVS Sampling flow on page 29



eVS Oversight Process Flow- follow process on page 30



Contents

Overview 1

Description of mailings 1

Postage Statement Submission Method 6

Hardcopy Postage Statement Mailing 6

Electronic Postage Statement Mailings 7

Seamless Mailing 8

eVS Sampling 9

eVS Oversight 10

Detailed Scorecard Review Instruction 11

Streamlined Mail Entry Performance Scorecard Review Process– BMEU 11

Full Service/Move Update Review Process - BMEU 12

eInduction Review Process - BMEU 13

Seamless Review Process - BMEU 14

Traditional Verifications 15

Cursory Review Process - BMEU 15

Plant Verified Drop Ship (PVDS) Documentation Check - BMEU 16

Plant Verified Drop Ship (PVDS) Verification Process - BMEU 17

Manual Barcode Verification Process – BMEU 18

Manual Presort Verification Process - BMEU 19

Weigh Verification Process – BMEU 20

Bundle Preparation Verification Process – BMEU 21

Content Eligibility Verification Process – BMEU 22

Mail Piece Count Verification (MPCV) Verification Process 23

MERLIN Verification Process – BMEU 25

Full Service/Seamless Sampling Verification Process – BMEU 26

Shortpaid Meter Sampling Verification Process – BMEU 27

Manifest Mailing Systems Verification Process – BMEU 28

eVS 29

eVS Sampling Verification Process – BMEU 29

eVS Oversight Process - BMEU 30

***Postalone!* Prompted Verifications**

X Full-Service /Seamless Sampling

- ☑ Manual Presort
- ☑ Bundle Prep
- ☑ Content Eligibility
- ☑ Deflection Test
- ☑ Documentation/Postage Statement Review
- ☑ Labeling Review
- ☑ Mailing Review
- ☑ Mailpiece Review
- ☑ Mailpiece Count
- ☑ Manual Barcode
- ☑ Shortpaid Meter Sampling
- ☑ Weigh Verification
- ☑ Plant Verified Drop Shipment (PVDS)
- ☑ MERLIN
- ☑ Manifest

Verify Every Eligible Mailing

- ☑ Plant Verified Drop Shipment (PVDS) Documentation Review

Postage Statement Submission Method

Hardcopy Postage Statement Mailing

1. Check-In Mailing

For package mailings review IMpb Compliance report
http://blue.usps.gov/mail-acceptance/evs-impb.htm

*Review IMpb Compliance report for package mailings monthly:
http://blue.usps.gov/mail-acceptance/evs-impb.htm

- Stage Mailing for Verification
- Process and finalize Mailing

2. Perform Postalone prompted verification(s)

Verification Passes

- Finalize Statement
- Print 3607P
- Release mail to Operations

Verification Fails

- Place mail on hold
- Notify mailer of error(s), metrics and determined resolution

3. Postalone Does Not Prompt for Verification

- Finalize Statement
- Print 3607P
- Release Mail to Operations

***Postalone!* Prompted Verifications**

- ☑ Full-Service /Seamless Sampling
- ☑ Manual Presort
- ☑ Bundle Prep
- ☑ Content Eligibility
- ☑ Deflection Test
- ☑ Documentation/Postage Statement Review
- ☑ Labeling Review
- ☑ Mailing Review
- ☑ Mailpiece Review
- ☑ Mailpiece Count
- ☑ Manual Barcode
- ☑ Shortpaid Meter Sampling
- ☑ Weigh Verification
- ☑ Plant Verified Drop Shipment (PVDS)
- ☑ MERLIN
- ☑ Manifest

Verify Every Eligible Mailing

- ☑ Plant Verified Drop Shipment (PVDS) Documentation Review

Electronic Postage Statement Mailings

1. Check In Mailing

Review Streamline Mail Entry Performance Scorecard for mailers participating in Full Service, eInduction, Seamless Parallel or *Package mailers using chart below:

Frequency of Mailing	Frequency of Scorecard Review	Frequency of Mailer Outreach
Daily	Daily	Bi-Weekly
Weekly	Weekly	Weekly
Monthly	Every Mailing	Every Mailing

- Identify mailings for Mail Quality Scorecard Review
- *Review IMpb Compliance report for package mailings monthly: http://blue.usps.gov/mail-acceptance/evs-impb.htm
- Stage Mailing for Verification
- Process and finalize Mailing

Note: If mailer uses SST (Self-Service Terminal) skip to step 3

2. Perform Seamless Sampling

Perform Seamless sampling for all Seamless Parallel mailings following the detailed verification instructions for Full-Service/Seamless Sampling

Note: Mailer not participating in Seamless Parallel skip to step 3

3. Postalone! Prompts Verification(s)

Verification Passes

- Finalize Statement
- Print 3607P
- Release mail to Operations
- Perform Mail Quality Review when mailing indicates required following the detailed scorecard review instructions

Verification Fails

- Place mail on hold
- Perform Mail Quality Check if identified
- Run scorecard and review programs (FS, Move Update, eInduction, Seamless) for errors. Notify mailer of error(s), metrics and determined resolution

4. Verification Not Prompted

- Finalize Statement
- Print 3607P
- Mail released to Operations
- Perform Mail Quality Check if identified
- Run scorecard and review programs (FS, Move Update, eInduction, Seamless) for errors.
- Notify mailer of error(s), metrics, and determined resolution

Reference Mail Quality Verification Detailed Scorecard Review Instructions

***Postalone!* Prompted Verifications**

- [x] Full-Service /Seamless Sampling
- [x] Manual Presort
- [x] Bundle Prep
- [x] Content Eligibility
- [x] Deflection Test
- [x] Documentation/Postage Statement Review
- [x] Labeling Review
- [x] Mailing Review
- [x] Mailpiece Review
- [x] Mailpiece Count
- [x] Manual Barcode
- [x] Shortpaid
- [x] Weigh Verification
- [x] Plant Verified Drop Shipment (PVDS) Documentation Review
- [x] Plant Verified Drop Shipment (PVDS)
- [x] MERLIN
- [x] Manifest

Seamless Mailing

1. Check Dashboard for Finalized Statement

- Click on the Postage Statement ID
- Generate 3607P Clearance Placard
- Perform Sampling Scan if Prompted
- Attached 3607P to Mail and clear to Operations
- Review Streamline Mail Entry Performance Scorecard using chart below:

Frequency of Mailing	Frequency of Scorecard Review	Frequency of Mailer Outreach
Daily	Daily	Bi-Weekly
Weekly	Weekly	Weekly
Monthly	Every Mailing	Every Mailing

Run scorecard and review programs (FS, Move Update, eInduction, Seamless) for errors. Notify mailer of error(s), metrics and determined resolution

2. Not Found/Not Finalized

- Contact Customer to inquire/Finalize Statement manually
- Perform Sampling Scan if Prompted
- Attached 3607P to Mail and clear to Operations
- Review Streamline Mail Entry Performance Scorecard using chart below:

Frequency of Mailing	Frequency of Scorecard Review	Frequency of Mailer Outreach
Daily	Daily	Bi-Weekly
Weekly	Weekly	Weekly
Monthly	Every Mailing	Every Mailing

Run scorecard and review programs (FS, Move Update, eInduction, Seamless) for errors. Notify mailer of error(s), metrics and determined resolution

Reference Mail Quality Verification Detailed Scorecard Verification Instructions

eVS Sampling

Selection of samples

Randomly select 70 samples from eVS identified containers

Sampling Process

Set up scale and use test weights to calibrate scale
Select Sampling Location, Verification Type and Zip Code of sampling site
Scan IMpb on eVS parcel
Verify Mail Class and Piece Level fields in scanner
Capture weight
Enter Shape for shape based weights, if applicable

eVS Oversight

Review Landing Page in PostalOne!

No Issues

Weekly review PostalOne! Landing page for status of postage statements and eVS errors Issues

Contact Shipper to resolve issues preventing finalization of postage statements

Contact Shipper to inform them and assist with resolving quality control issues within samples (PAF), manifesting, unmanifested, misshipped, IMpb, DEER, PEER, and content audits, if applicable

Review Dispute Queue

Review the dispute queue for any joint review requests for assigned eVS mailers

If a joint review has been requested, contact customer to obtain supporting documentation

Review supporting documentation

Determine if additional supporting documentation is needed from customer or HQ and request as needed

Submit request to Area Lead for escalation to HQ for assistance with review or recalculation of an assessment as needed

Upon resolution by eVS Analyst or HQ:

Contact mailer with findings

Make proper adjustments in PostalOne!

Collect adjustment, if necessary

Request Area Lead to close dispute in PostalOne!

Process Adjustments

On the 21st of the month, review the Monthly Adjustment Summary tab in PostalOne! to ensure all automatic adjustments have processed

Process any adjustments that are not set to automatic payment if issues have been resolved

Review the Monthly Duplicate Offline Validation Report and make necessary manual adjustments for duplicates

Area Oversight

Review the weekly Red Flag Report

Contact Districts that have outstanding assessments that are not paid for the current and previous months

Be informed of dispute status' in regards to collecting payment

Enforce Districts weekly review process

Review that Districts are performing weekly oversight and contacting mailers as necessary

Review that Districts are reviewing the dispute queue and are processing reviews in a timely manner

Review that Districts are processing adjustments upon resolution of joint review requests

Area Lead Oversight

Review the weekly Red Flag Report

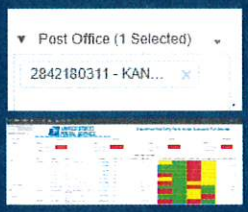
Confirm with Areas the status of outstanding assessments for current and previous months

Confirm with Areas status of joint review requests

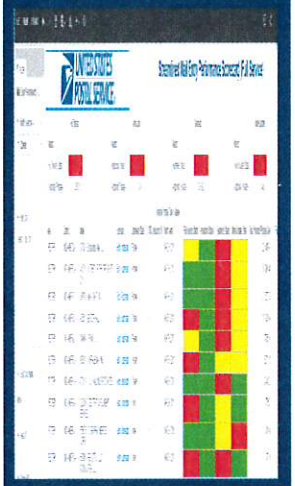
Detailed Scorecard Review Instruction

Streamlined Mail Entry Performance Scorecard Review Process– BMEU

Run



Review the Streamlined Mail Entry Scorecard



Re-Launch Scorecard

Export

Record Results

Step	Reason
<u>Step 1:</u> Run the Streamlined Mail Entry Performance Scorecard Type EDW in the Internet browser bar and click Enter ASR at the bottom of the webpage that displays or from inside PostalOne! click reports > click Verification and Performance Reports > Click Business Mail Acceptance > Shared Reports > User Shared > Mail Entry Adoption and Compliance Reports > Streamlined Mail Entry Performance Scorecard. Type your Finance Number or spell your BME site name in the Post Office search box in the lower left hand corner. Site information will automatically load for the current month.* *Pull the scorecard for the current month unless it is the first 5 days of the month, in which case pull the previous month's scorecard.	The scorecard is used to identify CRID's with errors over threshold and CRID's with errors under the threshold.
<u>Step 2:</u> Exporting to Excel or PDF Click on the BME Performance Export tab at the bottom of the page, Export the Streamlined Mail Entry Performance Scorecard as excel or PDF click ▼ In the upper right hand corner of the page > Export > Excel or PDF. Use this for Step 4	Excel and PDF exports also have links to access the eDoc Submitter scorecard
<u>Step 3:</u> CRID's Trending or over Threshold Selecting "Go to Scorecard" will open the selected CRID's eDoc submitter scorecard for the month selected. Perform Mail Quality Check: • View CRID's with potential errors and/or over threshold (yellow & Red). • Click "Go to Scorecard" to access the eDoc submitter scorecard. <u>Total Potential Postage Due:</u> This is the total potential postage due across all systems (FS, Move Update, eInduction, Seamless) month–to date for current month. **Frequency of Reviews**	**<u>Color Codes</u>** G=Green cell =No errors Y=Yellow cell= 1 or more errors R=Red cell = Errors over threshold **<u>Seamless Status</u>** Seamless = Seamless activated Parallel = Preparing for Seamless activation None= Not in the process for Seamless activation **<u>eInduction Status</u>** Y=eInduction activated N=Not activated for eInduction
<u>Step 4:</u> Contact the customer and record results Once you have identified specific errors, error type(s), job information, and resolution(s), contact customer by phone to review the scorecard and error information with them. Enter the results into the Mail Quality Review Survey: ***Link here:***	Customer contact is essential to assist them in identifying and correcting errors to avoid assessments and to provide quality data.
<u>Step 5:</u> Re-Launching & Saving the Streamline Mail Entry Performance Score Card Saving for your site 1. Select file > Create Personal View > Name your Scorecard >Select OK 2. To open your saved view >Select My Subscription >Select your scorecard that you saved	Scorecard will always be the most current scorecard. **Note:** After opening scorecard at least once for the day, for faster loading: Select My History > Select your scorecard that you have previously opened.

Frequency of Mailing	Frequency of Scorecard Review	Frequency of Mailer Outreach
Daily	Daily	Bi-Weekly
Weekly	Weekly	Weekly
Monthly	Every Mailing	Every Mailing

Full Service/Move Update Review Process - BMEU

Run Scorecard

Step 1: Run the Scorecard for the CRID

Click on the link to the mailer Scorecard from the daily Streamlined Mail Entry Performance Scorecard report and run report for current month.

The scorecard must be pulled for the current month to identify eDoc errors on the Electronic Verification tab.

Review Electronic Verification Tab

Step 2: Review the Electronic Verification Tab

The eInduction tab must be reviewed to identify eInduction errors.

Check for errors on:

Full Service

- Mailer ID (MID): MIDs in the IMcb, IMtb, & IMb™ as listed in the eDoc must be valid and assigned by the USPS®
- Service Type ID (STID): The STID in the IMb as listed in the eDoc must be valid and correct for the mail class and service level of the mailpiece
- Barcode Uniqueness: The IMcb, IMtb, & IMb as listed in the eDoc must be unique across all mailings from all mailers over the previous 45 days
- By/For Identification: The mail owner and preparer must be identified correctly in the eDoc for a mailing with 5000 pieces or more per day for a single mail owner
- Entry Facility: The Entry Facility for a container or handling unit as listed in the eDoc must match the entry facility from the Mail Direction File or the Facilities Database
- Unlinked CoPal: All trays/virtual sacks marked for co-palletization at origin must have corresponding eDoc linking to a pallet within 14 days

Move Update

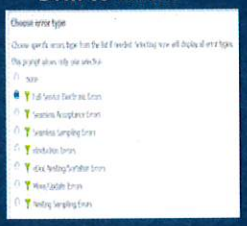
- Change of Address (COA) Errors: Any mailpiece with a valid COA 95 days to 18 months prior to the postage statement finalization date must be updated or it will be recorded as an error on the Scorecard.

Thresholds

Full Service

- Mailer ID: 2.0%
- Service Type ID: 2.0%
- Barcode Uniqueness: 2.0%
- By/For: 5.0%
- Entry Facility: 2.0%
- Unlinked CoPal: 5.0%
- Move Update: 0.5%

Drill to Errors



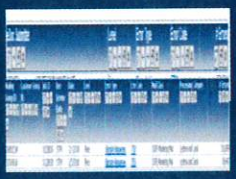
Step 3: Drill to errors

Drill into each error and identify the date, job ID and type of error, Refer to the Guide to Mailer scorecard:

https://postalpro.usps.com/storages/2017-07/766_GuideToMailerScorecard.pdf

Once an error is identified, the mailer will need specific information on what type of error it is, date of submission and Job ID.

Identify Resolution



Step 4: Identify Resolution

Once you have drilled into the error, read the resolution and notate what the customer needs to correct on future eDoc submissions to avoid more of the same type of errors.

Identify the resolution so the customer can correct future eDoc submissions and stay under thresholds.

Record Results

Step 5: Contact the customer and record results

Once you have identified specific errors, error type(s), job information, and resolution(s), contact customer by phone to review the scorecard and error information with them.

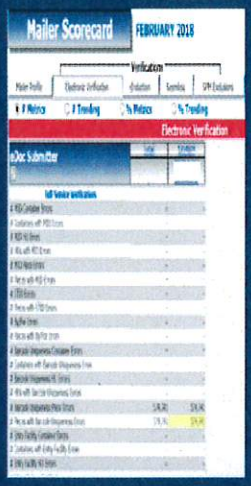
Record root cause of errors and resolution discussed with mailer on Streamlined Mail Entry Performance Scorecard excel file.

Customer contact is essential to assist them in identifying and correcting errors to avoid assessments and to provide quality data.

eInduction Review Process - BMEU

Run Scorecard

Review eInduction Tab



Drill to Errors

Identify Resolution

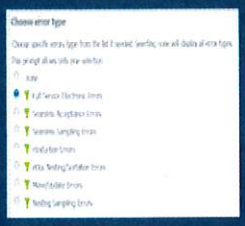
Record Results

Step	Reason
<u>Step 1:</u> Run the Scorecard for the CRID Click on the link to the mailer Scorecard from the daily Streamlined Mail Entry Performance Scorecard report and run report for current month.	The scorecard must be pulled for the current month to identify eDoc errors on the Electronic Verification tab.
<u>Step 2:</u> Review the eInduction Tab Check for errors on: •(Extra) Undocumented: An eDoc has not been submitted for a scanned and inducted container •Payment 0.0%: Payment status is not marked as finalized or finalized pending payment for a scanned and inducted container that was matched to an eDoc record. •Duplicate: Container barcodes on scanned/inducted containers have duplicates submitted within the previous 45 days. •Misshipped: The mailer shipped an eInduction container to an incorrect facility per the active version of the mail direction file, based on the mail class, processing category, container destination zip, and entry discount claimed on a container. •Entry Point Discount 0.5%: The mailer claimed an entry facility discount that was invalid at the actual entry location. Zone Discount (Periodicals and BPM Only) 0.01%: The mailer claimed a zone discount that was invalid at the actual entry location.	The eInduction tab must be reviewed to identify eInduction errors. <u>Thresholds</u> •Undocumented: 0.0% •Payment: 0.0% •Duplicate: 0.17% •Misshipped: 1.05% •Entry Point Discount 0.5% •Zone Discount: 0.01%
<u>Step 3:</u> Drill to errors Drill into each error and identify the date, job ID and type of error, Refer to the Guide to Mailer scorecard: <u>https://postalpro.usps.com/storages/2017-07/766_GuideToMailerScorecard.pdf</u>	Once an error is identified, the mailer will need specific information on what type of error it is, date of submission and Job ID.
<u>Step 4:</u> Identify Resolution Once you have drilled into the error, read the resolution and notate what the customer needs to correct on future eDoc submissions to avoid more of the same type of errors.	Identify the resolution so the customer can correct future eDoc submissions and stay under thresholds.
<u>Step 5:</u> Contact the customer and record results Once you have identified specific errors, error type(s), job information, and resolution(s), contact customer by phone to review the scorecard and error information with them. Record root cause of errors and resolution discussed with mailer on Streamlined Mail Entry Performance Scorecard excel file.	Customer contact is essential to assist them in identifying and correcting errors to avoid assessments and to provide quality data.

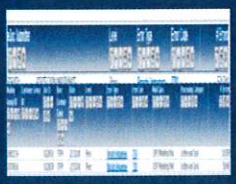
Run Scorecard

Review Seamless Tab

Drill to Errors



Identify Resolution



Record Results

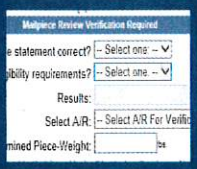
Seamless Review Process - BMEU

Step	Reason
<u>Step 1:</u> Run the Scorecard for the CRID Click on the link to the mailer Scorecard from the daily Streamlined Mail Entry Performance Scorecard report and run report for current month.	The scorecard must be pulled for the current month to identify eDoc errors on the Electronic Verification tab.
<u>Step 2:</u> Review the Seamless Tab Check for errors on: • <u>Undocumented Pieces</u> : An Undocumented piece error is logged when a piece cannot be associated with a valid eDoc submission over the past 45 days. This error is logged at the piece level. • <u>Delivery Point Verification</u>: The error is logged when the delivery point provided in eDoc is either not valid or contains generic +4 information with an address record type that is not General Delivery. • <u>Nesting/Sortation (MPE)</u>: The error is logged when the piece scanned is nested in a different tray or bundle than the tray or bundle that was identified in eDoc. Verifications using Postage Adjustment Factors (PAF) General • <u>Postage Verification</u>: A Postage Error is logged when the postage affixed amount of the sampled piece is less than the amount provided in eDoc, or the postage payment method of the sampled piece does not match the postage information in the eDoc. • <u>Weight Verification</u>: The Weight error is logged when the weight of the sampled piece is greater than the weight reported in eDon (including a tolerance). Mail Characteristic <u>Mail Characteristic Verification</u>: The processing category or mail class as scanned by the FS-IMD match's what was submitted in the eDoc at the container, handling unit, and piece	The eInduction tab must be reviewed to identify eInduction errors. <u>Thresholds</u> • Undocumented: 0.3% • Delivery Point: 2.0% • Nesting/Sortation: 1.0% • General PAF: 1.05% • Mail Characteristics: 1.05%
<u>Step 3:</u> Drill to errors Drill into each error and identify the date, job ID and type of error, Refer to the Guide to Mailer scorecard: <u>https://postalpro.usps.com/storages/2017-07/766_GuideToMailerScorecard.pdf</u>	Once an error is identified, the mailer will need specific information on what type of error it is, date of submission and Job ID.
<u>Step 4:</u> Identify Resolution Once you have drilled into the error, read the resolution and notate what the customer needs to correct on future eDoc submissions to avoid more of the same type of errors.	Identify the resolution so the customer can correct future eDoc submissions and stay under thresholds.
<u>Step 5:</u> Contact the customer and record results Once you have identified specific errors, error type(s), job information, and resolution(s), contact customer by phone to review the scorecard and error information with them. Record root cause of errors and resolution discussed with mailer on Streamlined Mail Entry Performance Scorecard excel file.	The scorecard must be pulled for the current month to identify eDoc errors on the Electronic Verification tab.

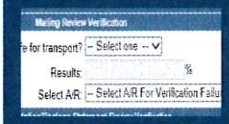
Traditional Verifications

Cursory Review Process - BMEU

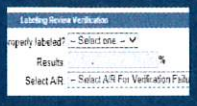
Mailpiece Review



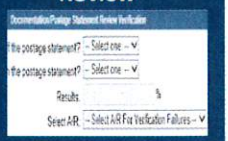
Mailing Review



Label Review

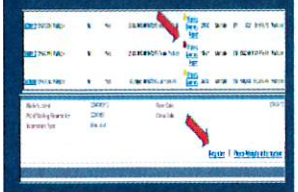


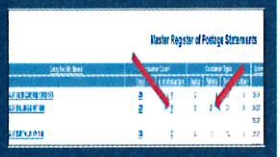
Documentation/ Postage Statement Review

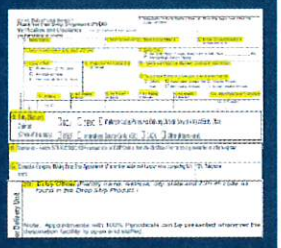


Step	Reason
<u>Step 1:</u> Select one or more mailpieces and visually inspect them for format and legibility requirements Inspect the mailpiece(s) for the following: • Mailability - Mailability refers to a mailpiece conforming to minimum and maximum size standards. • Processing Category- Determine if the correct mail processing category was claimed on the postage statement. • Machinable Criteria • Postage Payment Method • Markings/ Endorsements - Review mailpieces for appropriate markings, endorsements, and coding for services requested and prices claimed. • Flats Addressing - On all Periodicals, Standard Mail, Bound Printed Matter, Media Mail, and Library Mail flats mailed at presorted, automation, or carrier route prices • Address placement on/in Polywrap or Wrapper. • Is the processing category claimed on the postage statement correct? • Does the postage payment method meet format and legibility requirements? Record results: Yes or No	Ensure mailpieces meet the physical requirements related to the rates claimed on the postage statement and the postage payment method on the mailpiece meets the format and legibility requirements.
<u>Step 2:</u> Visually Inspect the mailing containers Is the mailing constructed safely? Observe the mailing before, during or after it has been unloaded. •Are the containers and/or handling units stable and safe for transport? Record Results: Yes or No	Ensure containers and/or handling units are stable and safe for transport
<u>Step 3:</u> Visually Inspect Labels from the mailing (Handling units and Containers) Do the contents match the label of the handling unit or container? Visually inspect several labels in a mailing. This includes making sure that the contents of handling unit match the label. Record Results: Yes or No	Ensure proper container labeling; delivery address; and contents match destination and sortation
<u>Step 4:</u> Visually inspect Hardcopy postage statement Has the mailer completed all applicable sections of the postage statement? Ensure the following: • There is a mailer or mailing agent signature • The Total Postage field is completed • There is a Permit or Publication number • Does the mailer provided documentation support the pieces and rates claimed on the postage statement? Record Results : Yes or No	Ensure hardcopy postage statements are completed and any supporting documentation matches the pieces and rates claimed on the postage statement

Plant Verified Drop Ship (PVDS) Documentation Check - BMEU







Step	Reason
<u>Step 1:</u> Determine Number of required PS Form 8125's If hardcopy 8125's, skip to step 4 Determine if a "Shipping Summary Report" is available within the statement No Shipping Summary Report: 8125 Required for each destination Shipping Summary Report available: Open the Register within the postage statement in PostalOne!	Determine if PS Form 8125's are required and completed correctly
<u>Step 2:</u> Perform Container Check Compare the container count for eInduction Containers to the number of Pallets.	Determine the number of 8125's required
<u>Step 3:</u> Validate PS Form 8125(s) Presented For Non-eInduction Containers Confirm the count of 8125's presented is correct according to the register within PostalOne!	Confirms the required 8125's were presented for non-eInduciton containers
<u>Step 4:</u> PS Form 8125(s) Mailer Field(s) Completion Check Confirm the following fields are completed: Boxes #3-13 Box #14 Boxes #15-16a Box #28	Ensure the correct information for each field is complete and accurate.
<u>Step 5:</u> Finalize PS Form 8125(s) • Complete Boxes 17-22 • Make 2 copies of the PS Form 8125 prior to signing and print name on each copy • Sign 8125 Box 26a-d of the original PS Form 8125(s) Only • Stamp Box 27 with Round Date on original and all copies of PS Form 8125(s)	

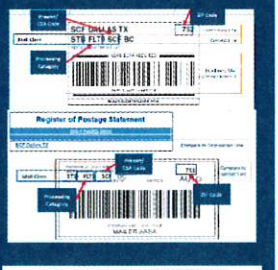
Plant Verified Drop Ship (PVDS) Verification Process - BMEU

Step **Reason**

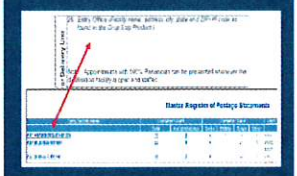
<u>Step 1:</u> Select Destinations for Verification
If hardcopy 8125's skip to step 5
Open the Register within the postage statement in *PostalOne!* to identify destinations for verification.

<u>Step 2:</u> Select Containers for Verification
- **Single Postage Statement with 1 Destination**
  Select 2 Containers from the mailing
- **Single/Multiple Postage Statements with multiple destinations <200K Pieces**
  Select 3 Destinations and 2 containers from each destination
- **Single/Multiple Postage Statements with multiple destinations => 200K Pieces**
  Select 5 Destinations and 2 containers from each destination

Note: When fewer destinations than required select all destinations within the mailing

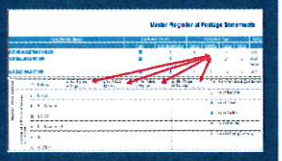


<u>Step 3:</u> Validate Container Placards by Destination Against Register
- Verify the destination line is correct
- Verify the contents line is correct by comparing to a handling unit label within the container
- Verify the container placard(s) contains a 99M Intelligent Mail Container Barcode (IMcb) for eInduction containers

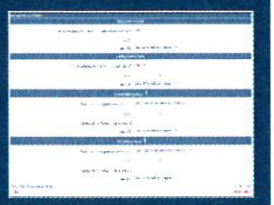


<u>Step 4:</u> Validate Handling Units on Container Are Correct
- Verify a minimum of 5 handling units on the container are correct by comparing the Handling Unit Labels to the destination on the container placard.

Reference: Labeling List



<u>Step 5:</u> Validate Container Count on PS Form 8125(s) For Non-eInduction Containers
- Verify container counts are correct on the 8125(s) for non-eInduction containers by comparing the total for Box 13a-e to the Register within *PostalOne!*
- Verify eInduction containers are not included in the total on PS Form 8125



<u>Step 6:</u> Complete the PVDS Verification Worksheet in *PostalOne!*
- Open the PVDS Verification Worksheet within *PostalOne!*
- Complete the verification worksheet
  - Select the checkbox next to "No" if no errors were identified

<u>Step 7:</u> Notify Mailer of PVDS Failure
- Record all errors on PS Form 8075 Disqualified Mail Log
- Notify mailer of discrepancy and determine resolution

Mailer Options for Failure
- Rework Mailing to correct discrepancy – Mailing is subject to new verification
- No Rework to correct discrepancy – Mailer must submit a new postage statement claiming no destination entry discounts

<u>Step 8:</u> Finalize PS Form 8125(s)
- Complete Boxes 17-22
- Make 2 copies of the PS Form 8125 prior to signing and print name on each copy
- Sign 8125 Box 26a-d of the original PS Form 8125(s) Only
- Stamp Box 27 with Round Date on original and all copies of PS Form 8125(s)

Note: You may indicate "COPY" in Box 26c on all copies

Manual Barcode Verification Process – BMEU

Select Samples

Visual Inspection

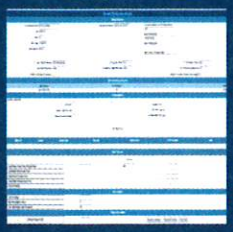
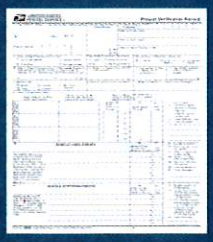
Template Inspection

Calculate Errors

Determine Status of Mailing Pass/Fail

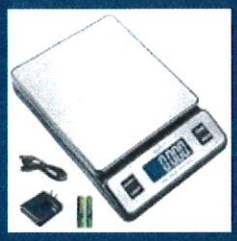
Step	Reason
Step 1: Select Samples Randomly select three trays/sacks/pallets from different parts of the mailing. Note: Three trays/sacks/pallets are selected at this time in case additional mail is needed to perform a Second or Third Barcode review.	This verification is performed to ensure mailings fall within the barcode quality tolerance levels
Step 2: Visual Inspection From the first tray/sack/pallet select 10 samples at random • Visually inspect the barcodes on the selected mail pieces • Examine the Intelligent Mail barcode (IMb). Look at the barcode to ensure that it has 65 bars and it is constructed with four different height bars • Look for skew and baseline shift.	Examine the barcode for excessive smearing. Individual bars must not touch or overlap.
Step 3: Visual Inspection using a template Check barcode placement and clearances to verify dimensions and spacing by aligning the mailpiece underneath the template to ensure barcode clearances and spacing are maintained as visible through the template. Use the mailing standards in DMM 202.5.0 for letters and 302.5.0 for flats to determine if the preprinted barcode is in the proper location on the mail pieces. https://pe.usps.com/text/dmm300/202.htm#ep1047220 Examine the barcode to ensure it meets the standards for barcode dimensions and spacing (DMM 708.4.3). Use the Automation Barcode Gauge (Item 04A), Template 67, and/or Flats Automation Template (Notice 124).	Examine the barcode to ensure it meets the standards for barcode print quality, dimensions and spacing (DMM 708.4.3).
Step 4: Record the results in *PostalOne!* • No further review is needed if all pieces in the first sample meet the standards for barcode quality, or if one (1) piece fails. The mailing passes the verification for barcode quality. • If 2 or more pieces fail, repeat steps 2-4 using pieces from 2nd handling unit. • If 2 or more pieces fail 2nd review, repeat steps 2-4 using 30 pieces from 3rd handling unit. If one (1) or more errors were found during the verification, the results of the verification must be recorded in the Barcode Verification Worksheet available in the *PostalOne!* system for the mailing being accepted. Access the verification worksheet by clicking on the icon within *PostalOne!*	The total postage due is the additional cost the USPS will incur in correcting the errors during mail processing.
Step 5 Determine Status of Mailing Mailing PASSES- finalize postage statement, placard and release mail to operations. Mailing FAILS- place mailing on hold Complete Disqualified Mail log Contact mailer with the following Options and enter into *Postalone!*: • If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field.	It is important to correctly record the outcome of the verification in *Postalone!,* to ensure proper data is used for Performance Based Verifications.

Manual Presort Verification Process - BMEU

Step	Reason
Select Samples 	
Step 1: **Gather handling units/bundles that *PostalOne!* Selects** Click on the Sample Selection Matrix to determine which handling units/bundles to sample. Access the verification worksheet by clicking on the icon in the Verification Results information screen. Randomly select the number of samples indicated within the worksheet from the mailing.	Manual Presort verification is performed to determine if the mail that was presented qualifies for the discounts that are claimed.
Inspect Mailing **Step 2: Visually Inspect the sample target** Determine if any errors exist for the following scenarios: • The contents of the tray and the label do not match. • Mail in a handling unit/bundle that would be missent if it is accepted as is. • Mail facing the wrong direction in a tray • An Optional Endorsement Line (OEL) on the mailpiece that does not match the handling unit label. • The ZIP Code on the mailpiece does not match the optional endorsement/handling unit. Other errors include poorly prepared mail such as automation mail without barcodes, permit imprint mail without indicia, precanceled mail without a return address.	If a presort error is detected (such as ZIP Codes that do not belong in the tray of mail) it is necessary to look at each piece in the tray and record the results on the hardcopy PS Form 2866 or the electronic version in *Postalone!*
Document Errors  **Step 3: Record any error(S) on PS Form 2866** Each error identified in the presort process must be recorded in the verification worksheet in *Postalone!* or on PS Form 2866. NOTE: PS Form 2866 -- If the verification can be performed AT THE COMPUTER so the acceptance employee can enter the data immediately; there is no need to complete a hard copy PS Form 2866. However, if the computer is at the counter and the mail is on the dock, a hard copy PS Form 2866 must be used to record any findings. Return to the computer to complete the verification worksheet.	PS Form 2866 will assist in determining total additional postage due based on the type and amount of errors.
Calculate Errors  **Step 4: Calculate Additional Postage Due** When the worksheet or PS Form 2866 indicates a result of 5% error or greater a presort failure has occurred. The Pending Additional Postage or Cost Avoidance field will be populated with a dollar figure. The Acceptance Employee must manually calculate the cost avoidance when using a PS Form 2866.	The total postage due is the additional cost the USPS will incur in correcting the errors during mail processing.
Determine Status of Mailing Pass/Fail **Step 5 Determine Status of Mailing** Based on results of the Manual verification take the following action(s): Mailing PASSES- finalize postage statement, placard and release mail to operations Mailing FAILS- place mailing on hold Complete Disqualified Mail log Contact mailer with the following Options and enter into *Postalone!:* • If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field. If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.	It is important to correctly record the outcome of the verification in *Postalone!* to ensure the proper data is used for Performance Based Verifications.

Weigh Verification Process – BMEU

Determine Piece Weight



Step	Reason
<u>Step 1</u> Determine weight of a single piece Using the electronic 8040 in *Postalone!*, or PS form 8040, select 10 pieces from the mailing and obtain the average weight of a single mailpiece in ounces and/or pounds.	This step is performed to obtain the weight of a single piece.

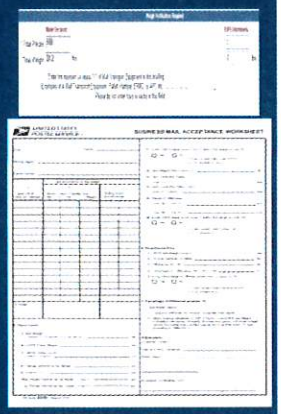
Determine Gross Weight

<u>Step 2</u>: Determine gross weight of mailing Place the complete mailing on the scale to obtain gross weight. • If the mail is in a container, the tare weight is required. Tare weight of the mailing containers or price level (i.e., trays, sacks, pallets, and rolling stock) can be found in the following locations: a. The weight of a USPS container may be marked directly on the container. If the weight is marked, use the weight provided. b. The weight of the container may not be provided. If the weight is not marked, weigh the empty container on the scale and record weight. c. For USPS containers that do not have the weight marked on the container, use the average tare weight on the USPS website: https://ribbs.usps.gov/mteor/documents/tech_guides/learninglab/MTECatlog.pdf	This step is performed to obtain the weight of the entire mailing minus the tare weight.

Determine Piece Count

<u>Step 3</u>: Determine Piece count of mailing Subtract the Tare weight (weight of handling units/containers) from the Gross Weight to get the Net Weight. Divide the weight of a single piece (from step 1) by the Net Weight to arrive at the piece count. Gross Weight — Tare Weight = Net Weight. Net Weight/Single Piece Weight = Piece Count.	This ensures mailer claimed pieces on postage statement match USPS determined number of pieces.

Record Results



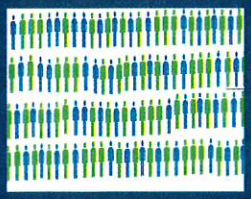
<u>Step 4</u>: Record Results Record Results in *PostalOne!* and/or PS Form 8040, Business Mail Acceptance Worksheet	This step ensures the verification is recorded in *PostalOne!*

Bundle Preparation Verification Process – BMEU

Step

Reason

Select Samples



Step 1 Select Samples

Select the sample bundles randomly from different parts of the mailing. The amount of samples are determined by the total pieces in the mailing as defined in the table below:

Total Pieces in Mailing	Number of Bundles to Sample
200-50,000	20
50,001-250,000	25
More than 250,000	30

When selecting samples:

- If the mailing contains less than the minimum number of bundles listed for a sample, review all bundles.
- If the mailing is in sacks, randomly select an adequate number of sacks to collect the required number of bundles. Sacks should be dumped out to evaluate bundle preparation.
- If the bundles are on pallets, select three pallets and randomly select bundles from the top, middle and bottom of each pallet.

Visual Inspection

Step 2 Visual Inspection

Perform Visual inspection of all selected sample bundles, including FSS bundles. Ensure none of the following errors are present:

- Loose banding (string, straps, etc.)
- • Poor shrinkwrap quality (torn, loose, not covering corners of open end)
- Pieces shifting excessively within bundle
- Poor address visibility.

The address information including the OEL and the barcode must be visible and readable by the naked eye in good lighting from a normal distance. The address should not be covered by crinkled or excess shrinkwrap or seam over address.

Additional Verification

Step 3

Additional Verification for FSS Bundles:

- Ensure FSS prepared bundles are prepared in accordance with the scheme combination in labeling list L006. Check if the right ZIP Codes combinations are in the FSS scheme bundles. Search for the ZIP Code(s) in the bundle against the L006 labeling list to validate that the ZIP Code(s) are supported by FSS facilities.
- Ensure that any bundle that is marked as a 5 digit scheme bundle has at least 10 pieces in the bundle when the class is Standard or Bound printed Matter
- Ensure that any bundle that is marked as a 5 digit scheme bundle has at least 6 pieces in the bundle when the class is Periodicals

For Sampled Bundles identified as FSS-Scheme Bundles:
A sampled bundle will be identified as 5-digit scheme bundle when the Optional Endorsement Line (OEL) suggests it is a 5-digit scheme bundle or if there is a red label with "5 SCH" barcoded pressure sensitive bundle label.

Record Results in PostalOne!

Step 4: Record the results in *PostalOne!*

Results of this verification must be recorded in the verification worksheet.
The verification worksheet can be accessed by clicking on the icon.

The total postage due is the additional cost the USPS will incur in correcting the errors during mail processing.

Determine Pass/Fail Status

Step 5 Determine Status of Mailing

Mailing PASSES- finalize postage statement, placard and release mail to operations.
Mailing FAILS- place mailing on hold
Complete Disqualified Mail log
Contact mailer with the following Options and enter into *Postalone!:*

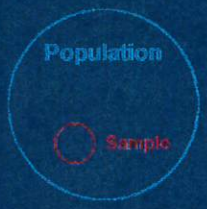
- If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field.

If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.

It is important to correctly record the outcome of the verification in *Postalone!* to ensure the proper data is used for Performance Based Verifications.

Content Eligibility Verification Process – BMEU

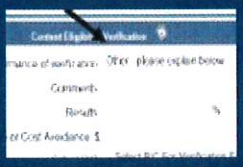
Select Sample(s)



Visually Inspect Mailpiece(s)

Rate-Specific Inspections

Record Results



Determine Status of Mailing

Step	Reason
<u>Step 1:</u> Select Samples • Sample Requirements for single customer within the mailing: Open at least one mailpiece and verify that the contents are eligible for the class of mail and price claimed. • Sample Requirements for multiple customers within the mailing: Depending on the number of customers within the mailing, use the chart below to determine the sample size:	The purpose of this verification is to determine mail eligibility by opening at least one piece of mail to validate the contents of the mailpiece is eligible for the rates claimed.

Content Eligibility Verification Number of Customers	One piece from this number of customers
1	1
2 to 15	2
16 to 25	3
26 to 90	5
91 to 150	8
151 to 280	13
281 to 500	20
501 to 1200	32

<u>Step 2:</u> Visually Inspect Mailpiece(s)

Exception: Do not open First-Class and packages mailed by known pharmaceutical mailers and Official Election Ballots.

Open the mailpiece(s) to visually inspect the entire content for:
• Any handwritten or typewritten
• Bill or statement of account
  • Personal information *

* Personal information is any specific to the addressee. The mailpieces could still qualify for USPS Marketing Mail process if at 200 pieces contain the same personal information in the overall mailing.

<u>Step 3:</u> Rate-Specific Inspections

Nonprofit Mail: Same as Standard Mail with additional restrictions:

1. Travel arrangements are restricted -- the three (3) elements of travel are transportation, accommodation, and destination...all must be present or implied to constitute travel
2. Insurance policies are restricted – must not be generally commercially available
3. Financial instruments are prohibited - such as credit, debit or charge cards, including affinity cards

Periodicals: Publications must comply with content standards for Periodicals price eligibility.

<u>Step 4:</u> Record Results in *Postalone!*

Click on the Icon to open the Content Eligibility Worksheet. Use the drop down to choose your answer:

No Error Found
Non-Profit Rate Mailing contained USPS Marketing Mail Regular Rate Content
USPS Marketing Mail Regular Rate Mailing contained First-Class Content
Non-Profit Rate Mailing contained First-Class Content
Other - please explain below

Save and Submit form
Postage will be adjusted if errors are present.

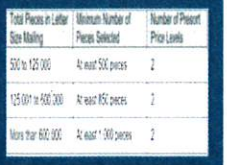
<u>Step 5</u> Determine Status of Mailing

It is important to correctly record the outcome of the verification in *Postalone!* to ensure the proper data is used for Performance Based Verifications.

Mailing PASSES- finalize postage statement, placard and release mail to operations.
Mailing FAILS- place mailing on hold
Complete Disqualified Mail log
Contact mailer with the following Options and enter into *Postalone!:*
• If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field.
If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.

Mail Piece Count Verification (MPCV) Verification Process

Select Sample(s)

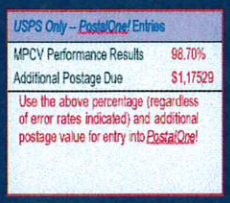


Total Pieces in Letter Size Mailing	Minimum Number of Pieces Selected	Number of Presort Price Levels
500 to 125,000	At least 500 pieces	2
125,001 to 600,000	At least 850 pieces	2
More than 600,000	At least 1,300 pieces	2

Visually Inspect Mailpiece(s)

Complete MPCV Workbook

Record Results



Determine Status of Mailing

Step	Reason

Step: 1 Select Samples

Determining the Sample Size for Letter-Size Mailings

Total Pieces in Letter Size Mailing	Minimum Number of Pieces Selected	Number of Presort Price Levels
500 to 125,000	At least 500 pieces	2
125,001 to 600,000	At least 850 pieces	2
More than 600,000	At least 1,000 pieces	2

Determining the Sample Size for Flat-Size Mailings

Total Pieces in Flat Size Mailing	Minimum Number of Pieces Selected	Number of Presort Price Levels
500 to 50,000	At least 300 pieces	2
50,001 to 150,000	At least 400 pieces	2
More than 151,000	At least 500 pieces	2

Select destinations for the piece-count analysis from the mailer's documentation. Using the Summary ZIP Destination Report, select at least two destinations (5-digit, 3-digit and/or AADC) containing more pieces than the minimum required as listed in the tables above, using destinations that contain all or most of the different postage payment methods.

Continuous Mailings:

MPTQM Mailers	5-Digit Destinations	3-Digit Destinations	AADCs
Number of Candidate Destinations to Hold	1	4	1
Number of Actual Destinations to Verify	Select any 2, (3, or 4) of the 6 destinations above to verify and begin the piece-count process.		

The purpose of this verification is to determine:

- There are not more permit imprint pieces in the mailing than claimed on the documentation.
- Permit imprint pieces are paid according to weight.
- Metered mail has been accurately profiled according to the price affixed.

Determine, in a Value Added Refund (VAR) environment, there are not fewer metered pieces in the mailing than claimed on the refund documentation.

Step 2: Complete MPCV Workbook

From the BMA page, MAPS, JOB Aids, User Guides, under the Tools and User Guides Tab, select the appropriate MPCV Workbook.

- Enable Worksheet,
- Click Price Marking Assignments to view Price Codes.
- Click Appropriate Worksheet for Rates claimed
- Choose Rate Level, Enter Zip Code of tray
- Using the appropriate Postage Affixed section (MT, PC, PI) Enter the total count of pieces in the row based on sortation level for the mailer from Summary Page, and also for USPS based on physical count of the mail.

http://blue.usps.gov/mail-acceptance/maps-job-aids-user-guides.htm

MPCV Worksheet compares physical mail as sampled by USPS against Mailer provided documentation.

Step 4: Record Results in *PostalOne!* And on MPCV Log

MPCV Performance Results and any Additional Postage Due for entry into the *PostalOne!* system will be displayed in a box identified as 'USPS Only – *PostalOne!* Entries' at the right of the 'Comments' box located below Part E of the 'Piece Count' page. Use only this information for input into *PostalOne!* only after an MPCV verification sampling and calculation is complete.

Record results into *Postalone!* AND onto manual MPCV quarterly sampling log.

Step 5: Determine Status of Mailing

Mailing PASSES- finalize postage statement, placard and release mail to operations.

Mailing FAILS- place mailing on hold

Complete Disqualified Mail log

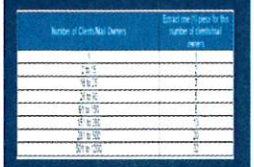
Contact mailer with the following Options and enter into *Postalone!*:

- If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field.

If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.

It is important to correctly record the outcome of the verification in *Postalone!* to ensure the proper data is used for Performance Based Verifications.

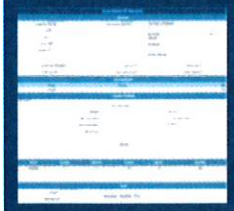
Select Sample(s)



Perform Deflection Test

Additional Sampling Requirements

Record Results



Determine Status Of Mailing

Deflection Test Verification Process – BMEU

Step	Reason
<u>Step 1:</u> Select Samples Sample Requirements: Select one piece of mail from a single client mailing or follow the chart below for a Combined or Co-bundled mailing:	The Deflection test is performed to ensure the mail

Number of Clients/Mail Owners	Extract one (1) piece for this number of clients/mail owners
1	1
2 to 15	2
16 to 25	3
26 to 90	5
91 to 150	8
151 to 280	13
281 to 500	20
501 to 1200	32

<u>Step 2:</u> Perform Deflection Test

- Place the piece on a flat, straight-edge surface with the length perpendicular to the edge and extend the piece 5 inches off the edge. Test square-shaped bound flats by placing the bound edge parallel to the edge.
- Place a flat 12-inch ruler (or similar flat object 12 inches or longer) on top of the mailpiece with the length of the ruler parallel to the edge of the surface and as close to the edge as possible so that the 5-pound weight does not extend past the edge.
- Place a certified 5-pound weight on center of ruler to hold the piece in place.
- Determine the vertical deflection in inches.
- Turn the piece around 180 degrees and repeat the process.

<u>Pieces 10 inches or longer:</u>
The piece is mailable as a flat if it does not droop more than 3 inches vertically at either end.
<u>Pieces less than 10 inches long:</u>
The piece is mailable as a flat if it does not droop more than 2 inches less than the extended length at either end.

Establish the length of the mailpiece: The length of a flat-size mailpiece is the longest dimension. The height is the dimension perpendicular to the length. When determining the maximum height or length of a flat, include any selvage of polywrap material that may enclose the piece. When determining the minimum height or length of a flat, do not include the selvage of any polywrap material that may enclose the piece.

<u>Step 3:</u> Additional Sampling Requirements
Identical Piece Weight Mailings:

- Extract one (1) piece from the mailing and test according to length of the mailpiece.
- If the mailpiece fails deflection, test four (4) more pieces.
- If one (1) of the additional four (4) pieces tested fails, the mailing fails deflection.
- If none of the additional four (4) pieces tested fail, the mailing passes deflection.

Combined or Co-bundled Mailing:

- Determine the number of clients/mail owners in the mailing and extract one (1) mailpiece from the mailing for each client/mail owners as outlined in the table above (Step # 1).

If the mailpiece extracted for a particular mailer fails deflection...the mailpiece fails deflection. Do not test additional mailpieces in the mailing for this mailer.

Exceptions and Exclusions: Flats mailings that are prepared entirely as ECRWSH and ECRWSS do not require testing. Flats that are prepared at basic carrier route prices (ECRLOT) and drop-shipped to DDUs do not require testing. Do not perform deflection testing on Periodicals claimed at nonmachinable prices.

<u>Step 4:</u> Record the Results in PostalOne!
If errors are found, enter them into the worksheet in *Postalone!* otherwise, enter 100% in the verification results.
*The verification worksheet can be accessed by clicking on the icon.

The total postage due is the additional cost the USPS will incur in correcting the errors during mail processing.

<u>Step 5:</u> Determine Status of Mailing
Mailing PASSES- finalize postage statement, placard and release mail to operations.
Mailing FAILS- place mailing on hold
Complete Disqualified Mail log
Contact mailer with the following Options and enter into *Postalone!*:

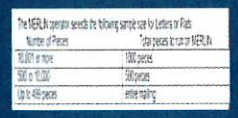
- If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field.

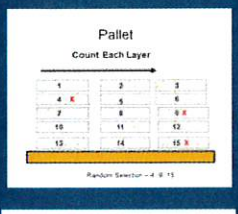
If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.

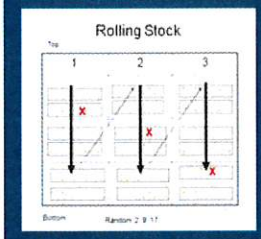
It is important to correctly record the outcome of the verification in *Postalone!* to ensure the proper data is used for Performance Based Verifications.

MERLIN Verification Process – BMEU

Select Sample(s)







Send Job to MERLIN

Finalize Results

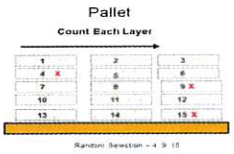
Determine Status of Mailing

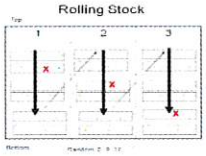
Step	Reason
<u>Step 1:</u> After all elements are populated on the postage statement processing screens the *PostalOne!* user will submit the postage statement to MERLIN by clicking on the "Submit to MERLIN" button in the lower right hand corner of the page. The postage statement will then show up on the MERLIN job list displayed within the MERLIN machine. **Select Samples** Sample size is determined by the number of pieces in the mailing and not the number of pieces contained in the sample size as determined by the Selection Matrix. If the trays generated by the Selection Matrix do not generate the required sample size (1,000 or 500 pieces), select additional handling units to meet the required sample size	The Mailing Evaluation and Readability Lookup Instrument (MERLIN) is a verification tool designed to assist acceptance employees in the verification of presort and barcode readability.

The MERLIN operator selects the following sample size for Letters or Flats:

Number of Pieces	Total pieces to run on MERLIN
10,001 or more	1000 pieces
500 to 10,000	500 pieces
Up to 499 pieces	entire mailing

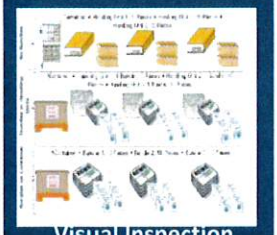
Selecting the handling units for verification involves counting the handling units. Example: A mailing consists of 22 handling units. The Selection Matrix requires handling units 5, 11 and 19. Start counting trays until you reach the randomly selected number (e.g. 5, 11, 19).





<u>Step 2:</u> Run the mail on MERLIN Log into the MERLIN>test the MERLIN (Dust, weights, Go-No-Go etc.) as required. Select the job from the Evaluation Job List Queue>Click Next>Class of Mail>Next>Permit Type>Next>if the job is not in queue, click Other Run>Next> and enter the postage statement Information into MERLIN manually. Scan all Handling Units needed for the run as required. Select all other prompts for the MERLIN set up. Press the green transport button to turn on the MERLIN, Click the yellow button to start feeder. Take pieces for tray one>process thru MERLIN until all trays of been processed. Click Run Complete Analyze to see if the test has errors or it has passed. Click Next on Report Generation. Review reports for errors. If error, look at error descriptions and the physical mailpiece to see if it is a valid error. Or if a possible error override is needed. If no errors or if you have corrected errors>Save and Exit".	If a statement is entered into *PostalOne!* and submitted to MERLIN but the job is not shown on MERLIN job list, use the 'Other Run" function in MERLIN and manually enter the PSID from *PostalOne!* into the PSMID block in MERLIN.
<u>Step 3:</u> Finalize Results After the MERLIN verification process is complete. Access the applicable postage statement from the *PostalOne!* dashboard to validate the results. If the verification results are not received in *PostalOne!,* use the manual entry of MERLIN verification results instructions outlined below: • In *PostalOne!* select the statement (PEN Status) from the dashboard. The statement will open to the verification results page. In the MERLIN verification results section, click on the manual override box. Enter a reason for the manual override, e.g. System network problems. Using the information from the MERLIN Summary Verification report, enter the result for each verification (presort, barcode, etc.) in the correct row/column.	
<u>Step 4:</u> Determine Status of Mailing Mailing PASSES- finalize postage statement, placard and release mail to operations. Mailing FAILS- place mailing on hold Complete Disqualified Mail log PS Form 8075 Contact mailer with the following Options and enter into *Postalone!:* • If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field. • If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.	It is important to correctly record the outcome of the verification in *Postalone!*, to ensure the proper data is used for Performance Based Verifications.

Full Service/Seamless Sampling Verification Process – BMEU

	Step	Reason
Scanner/Scale Set Up Select Sample(s)	**Step 1: Setup Scanner** Log into Scanner Select Full-Service Sampling Icon Calibrate Scale	Sampling allows the Postal Service to validate that mailers are preparing mailings that comply with mail preparation requirements as stated in the DMM and other guideline documents.
 Visual Inspection	**Step 2: Determining Sampling** Sampling Criteria: 1 Container, 3 Handling Units, 10 pieces from each handling unit (30 pieces total). Select Container and handling units for sampling Note: If there are no containers start sample at the handling units	F = Full Service M = Mixed Service Mailings IMsb-SE = Seamless *(This is a PostalOne! display issue that will be corrected later this year. Sampling will occur according to FS criteria)*
Perform Sampling	**Step 3: For Full-Service Mailings Perform Visual Verification** Validate Containers have Intelligent Mail Container Barcode (IMcb) Placards and/or are not covered by shrink-wrap Validate Handling Unit(s)/Sack(s) contain Intelligent Mail Tray Barcode (IMtbs) Validate mailpieces contain Intelligent Mail Barcodes (IMb)	Ensures mailings claiming Full-Service Discounts do have the Intelligent Mail Barcodes at the Container, Handling Unit and Piece Level
Record Results	**Step 4: Perform Sampling** Select Start a New Sample Scan container Scan handling unit and follow prompts on scanner Scan piece Select processing category Select presort level Select Payment Type Weigh piece utilizing bluetooth scale if available Confirm sampling of handling is complete Repeat for each additional handling unit(s)/piece(s)	SP=Seamless Parallel IMsb-SE=Seamless *(This is a PostalOne! display issue that will be corrected later this year. Sampling will be prompted in the Verification Results Information Section of the postage statement transaction)*
	Step 5: Record Results in *PostalOne!* **Full-Service Visual Verification** Enter Pass/Fail in to *PostalOne!* A mailing will only fail Full-Service Verification if: • 3 or more IMcb Placards missing and/or covered by shrink-wrap • 3 or more Handling Unit/Sack IMtbs are missing • 4 or more mailpieces with no IMb The loss of Automation Discount based on the results of a MERLIN/Manual Presort Verification **Seamless/Seamless Parallel** Click Check box to indicate FS-IMD Sampling Completed	SE=Seamless Nonbarcoded Workbook located on the BMA page, Maps, Job Aid, User Guides, Tools and User Guides, Seamless Acceptance http://blue.usps.gov/mail-acceptance/maps-job-aids-user-guides.htm

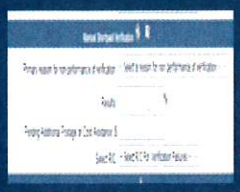
Shortpaid Meter Sampling Verification Process – BMEU

Select Sample(s)

Identical Piece Sampling

Non-Identical Piece Sampling

Record Results



Determine Status of Mailing

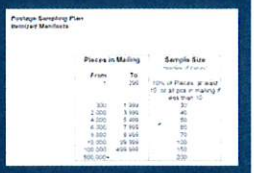
Step	Reason
Step 1 The purpose is to make sure that First-Class metered mail is paid for at the appropriate rate. For mailings not processed MERLIN, PBV will prompt for verifications.	PS Form 6116-First Class Metered Mail Shortpaid Sampling Worksheet
Step 2: Identical Pieces Sampling 1. Randomly select 5 pieces from no more than 5 trays/sacks. 2. Weight each item and check for correct postage 3. If no shortpaid pieces are found, sampling is complete 4. If one or more pieces are found, select 25 additional pieces. 5. If only 1 shortpaid pieces out of 30 is found the sampling is complete. If 2 or more are found, *PostalOne!* will calculate the additional postage due. 6. Notify the customer of the additional postage due for the mailing.	The sampling is performed during MERLIN verification, the worksheet is generated by the system.
Step 3: Non-Identical Piece Sampling 1. Randomly select 30 pieces from no more than 5 trays/sacks. 2. Weight each item and check for correct postage 3. If you find no more than 1 shortpaid piece, the sampling is complete. 4. If 2 or more errors are found, please refer to the detailed instructions to proceed. 5. Notify the customer of postage of shortpaid pieces.	In *PostalOne!* verification selection. Click the question mark for detailed instructions for conducting the verification.
Step 4 Enter sampling results into the *PostalOne!* Shortpaid Verification worksheet. Save, Submit and Print form if verification failed and provide to customer. When postage due is identified, the mailer may agree to pay determined charges or retrieve and correct entire mailing. A new sample must be taken on reentry of the mailing.	
Step 5 Determine Status of Mailing Mailing PASSES- finalize postage statement, placard and release mail to operations. Mailing FAILS- place mailing on hold Complete Disqualified Mail log Contact mailer with the following Options and enter into *Postalone!:* • If a mailer chooses to fix their mailing select "Returned for Rework" in the Select R/C field. • If a mailer chooses to pay the additional postage select "Collected Additional Postage" in the Select R/C field.	It is important to correctly record the outcome of the verification in *Postalone!,* to ensure the proper data is used for Performance Based Verifications.

Manifest Mailing Systems Verification Process – BMEU

Manifest Mailing

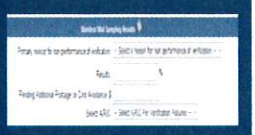
MMS Sampling

Sample Size



Conduct Sampling

Record PAF Results and Determine Status of Mailing



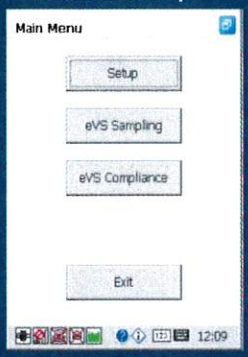
Step	Reason
Step 1: Manifest Mailing System The sampling is done to validate the correct poste is paid for each. To conduct the sampling actual pieces of mail are selected and matched to the manifest.	Please refer to the Pub 401 Guide to Manifest Mailing System for detailed instructions and examples.
Step 2: MMS Sampling/Postage Adjustment Worksheets • The sampling is recorded in *PostalOne!* on the applicable MMS Sampling/Postage Adjustment Worksheet or, for non-*PostalOne!* Sites or International samplings that are not able to be performed in *PostalOne!*, on hardcopy using the applicable MMS Sampling/Postage Adjustment worksheet. • The worksheet will show whether all pieces have been included on the manifest and the postage is correctly calculated on the manifest or if additional postage needs to be collected based on the PAF.	The worksheet will also indicate if the customer is overpaying and alert the Acceptance Employee that there may be a problem with the customer's MMS.
Step 3: Frequency and sample size The frequency and sample sizes are determined by PBV with exception of Mixed Class Manifest, Combined Parcel Manifest, and International Mailings. • For itemized manifest mailings (except for Mixed Class Manifest and Combined Parcel Manifest). If the samples exceeds 50, use the Sampling Plan matrix from the Pub 401 and the Manifest Summary, to determine your sample size. • For batch manifest mailings, if the prompted sample size is less than 100 pieces, or more than 500 pieces, use the Sampling Plan matrix from the Pub 401, and the Manifest Summary to determine the actual sample size. Separate instructions for Mixed Class Manifest. Combined Parcel Manifest has a separate workbook to complete the samplings.	International Mailings are completed using a manual PS Form 8159 and tracked manually using the frequency and sample size in in the Pub 401 Guide to Manifest Mailing System.
Step 4: Conduct the Sampling • Select the number of pieces to be sampled as determined by PBV. • Enter the mailpiece information on the applicable MMS postage verification sampling worksheet in *PostalOne!* • Finalize the MMS postage verification sampling worksheet in *PostalOne!* by following the system prompts.	
Step 5: PAF • If the PAF is between .985 and 1.015, no additional revenue needs to be collected. • Select "Save and Complete" to continue and finalize the postage statement. • If the PAF is greater than 1.015, additional revenue is due. • Notify the mailer of the results and their options to authorize the payment of additional postage *OR* take the mailing back for re-work. • Record their response in the MMS Sampling Worksheet, and then select "Save and Complete" to continue and finalize the postage statement.	For document retention requirements, please refer to the Pub 401.

eVS

eVS Sampling Verification Process – BMEU

Sample Selection

Scanner Setup



Scale Setup

Scan Samples

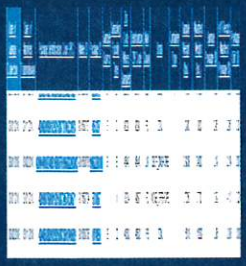
Step	Reason
<u>Step 1:</u> Sample Selection Randomly select 70 parcels from eVS identified containers for sampling If all 70 samples can't be obtained from a single mailing, continue gathering samples from subsequent mailings until 70 samples have been obtained	Every week: 70 eVS parcels must be sampled per shipper at each sampling site
<u>Step 2:</u> Scanner Setup •Log into IMD scanner identifying User ID, Password and preset Site ID •Perform Screen Alignment, Scanner Test, Scale Setup, Scan Summary functions from the eVS System Setup Menu.	The scanner must be setup each day samples are collected
<u>Step 3:</u> Scale Setup •Connect IMD scanner to Bluetooth scale if available. •Ensure the scale is level •Perform Scale Calibration	The scale must be setup each day samples are collected
<u>Step 4:</u> Facility/Sample Setup Select type of Sampling and Verification Locations	The Facility/Sample setup must be completed each day samples are collected
<u>Step 5:</u> Capture Samples •Scan or manually enter IMpb on each sample into IMD scanner •Populate Attributes of the packages in the IMD scanner	The IMpb must be captured in the IMD either by scanning or manually entering the barcode.

Review the Landing Page

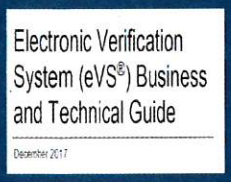
Review Monthly Account Summary Tab

Drill to Errors

Identify Resolution



Contact Customer



eVS Oversight Process - BMEU

Step	Reason
Step 1: Review the Landing Page in *PostalOne!*	The Landing Page must be pulled for the current month to identify eVS errors.
Go to *PostalOne!*, eVS/PRS Reports, enter assigned mailer into mailer name search box, select applicable, month and year and select "show data" to run report	
Step 2: Review the Monthly Account Summary Tab	The Monthly Account Summary tab must be reviewed to identify eVS errors.
Check for errors on: • Postage Adjustment Factor: Calculated for each mail class/product sampled by dividing the total postage for the samples by the total postage recalculated for the corresponding package records in the manifest file. The threshold is 1.015%. • Manifest Errors: Calculated when rate ingredient combinations from the mailer's manifest do not product a valid price. • Unmanifested Errors: Errors for packages that were accepted and scanned for which PTR and eVS never received or successfully processed electronic manifest records representing the packages. • Misshipped Parcel Errors: Errors for parcels deposited at an incorrect entry facility • Duplicate Errors: Errors for parcels that receive multiple delivered scan events in PTR without corresponding payment records for the packages. • IMpb Compliance Errors: Errors for mailers who do not meet the requirements Barcode Quality, Address Quality, and/or Manifest Quality are charged $.20/piece. • Incorrect Packaging Errors: Errors assessed for identification of parcels using Priority Mail, Priority Mail Express packaging, labels, or markings but identified and manifested as a non-expedited mail class. • Destination Entry Errors: Errors for parcels that were not deposited at the correct entry facility. The mailer doesn't quality for the claimed destination entry prices. • Presort Eligibility Errors: Loss of Presorted Prices when mailer didn't quality for presort rate by not meeting the minimum volume for the mailing. • Short-Paid Errors: Errors for packages that were underpaid as determined by census data from mail processing equipment. Can be used in place of PAF. • Ineligible Content Errors: Errors associated to Bound Printed Matter or Media Mail that were detected during a Content Audit. The pieces detected were found to contain ineligible content for the rates claimed	
Step 3: Drill to errors	Once an error is identified, the mailer will need details of the error.
Drill into each error and identify the issue driving the error based on the error type. Refer to the Publication 205: https://postalpro.usps.com/mnt/glusterfs/2018-02/eVS_pub205_DEC29_revision.pdf	
Step 4: Identify Resolution Once you have drilled into the error, notate what the customer needs to correct on future manifest submissions to avoid more of the same type of errors or make corrections as necessary.	Identify the resolution so the customer can correct future manifest submissions.
Step 5: Contact the customer Once you have identified specific errors and resolution(s), contact customer by phone to review the landing page and error information with them.	Customer contact is essential to assist them in identifying and correcting errors to avoid assessments and to provide quality data.