
Mail Service Providers Guide to Intelligent Mail

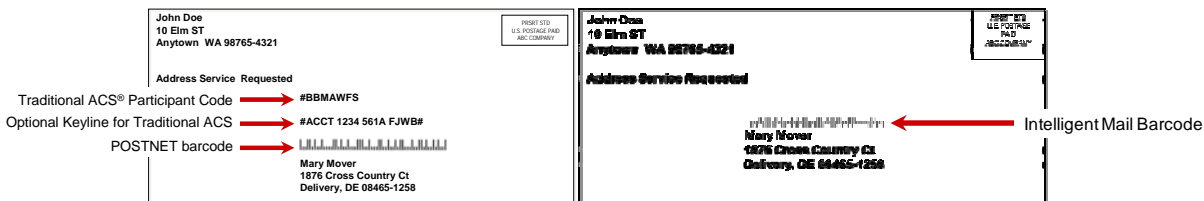
The United States Postal Service recently announced the retirement of the POSTNET™ barcode for automation price eligibility by January 2013. To continue to be eligible for automation prices, mailings of letter-size and flat-size mailpieces will need to have an Intelligent Mail barcode (IMb™) affixed to the mailpieces.

The new migration to the Intelligent Mail barcode (IMb) applies to the following mail classes and processing categories:

- First-Class Mail® letters and flats
- Standard Mail® letters and flats
- Periodicals letters and flats
- Bound Printed Matter flats
- Qualified Business Reply Mail and Permit Reply Mail

The POSTNET barcode may still be used; however these mailpieces will not be eligible for automation pricing.

When comparing the POSTNET barcode and the Intelligent Mail barcode, you will see they both contain the Routing Code (zip+4), but the IMb has a much greater data capacity. In addition to the routing code, the Intelligent Mail barcode includes four additional fields: Barcode ID, Service Type ID (STID), Mailer ID (MID) and Serial Number. These additional fields allow mailers to define the class of mail, identify the services they wish to procure such as tracking and address correction, and enables mailers to uniquely identify mailpieces. In the example below, you will see that with the POSTNET option if a mailer wishes to use address correction services, additional information, such as the participant code, and keyline, are required on the mailpiece to deliver the address correction information back to the correct recipient (sample on the left). Migrating to the Intelligent Mail barcode allows the mailer to use the IMb to request the address correction service information, thereby eliminating the need for a keyline and participant code.



Intelligent Mail – Basic and Full-Service

The Intelligent Mail Service is built around a suite of intelligent barcodes for mailpieces, handling units (trays and sacks) and containers.

The Postal Service offers two Intelligent Mail Service options for mailers: Basic and Full-Service.

- Under the Basic option, mailers migrate from the POSTNET barcode to the Intelligent Mail barcode for mailpieces.
- Under the Full-Service option, in addition to using Intelligent Mail barcodes on mailpieces, mailers need to use the Intelligent Mail Tray labels on their handling units (trays, sacks), and the Intelligent Mail Container labels on their container placards. The Intelligent Mail barcodes affixed on the mailpieces, handling units and containers need to be unique for a period of 45 days. Mailers are required to submit their mailing information such as Postage Statements and Qualification Reports

electronically. Mailers will receive additional benefits with the Full-Service option to include a discounted postage price, Start-the-Clock information (indicating when their Full-Service mailings were inducted into the Postal mailstream) and address correction information at no charge.

The intelligent barcodes for mailpieces, handling units and containers are comprised of the following data fields:

- An Intelligent Mail barcode (IMb) for mailpieces is a 31-digit barcode consisting of the routing code and four additional fields which add additional intelligence such as mail class, service requested, mailer identification and unique serial number for tracking. This barcode is used in place of the POSTNET barcode
- Intelligent Mail tray barcode (IMtb) is a 24-digit barcode printed on handling unit (tray and sack) labels to provide unique identification within postal processing. In addition to the destinating ZIP Code, Content Identification Number (which describes the presort makeup of the tray) and the Processing Code (which identifies the machinability of the mailpieces within the tray), this barcode contains three additional fields: the Mailer ID, Serial Number and Label Type. These three additional fields allow the mailer to uniquely identify the tray. This barcode is used in place of the legacy 10-digit tray and sack barcode label.
- The Intelligent Mail Container (IMcb) is 21-digit barcode printed on container placards to provide unique identification within postal processing. This barcode contains four fields which include an Application Identifier, Type, Mailer ID and Serial Number. These fields enable the mailer to uniquely identify the barcode affixed on container placards.

The following table highlights the key differences between the Basic and Full-Service options.

	Basic	Full-Service
Barcode on Mailpiece	31-digit IMb – uniqueness not required	31-digit IMb – Uniqueness required
Handling Unit (trays, sacks)	24-digit IMTB or Legacy 10-digit Tray and Sack Label – uniqueness not required	24-digit IMtb – Uniqueness required
Container Placards (Pallets, Skid boxes)	21-digit IMcb, not required	21-digit IMcb - uniqueness required where containers are required
Mailing Information (e.g., Postage Statements, Qualification Report)	Hardcopy, Mail.dat [®] , Mail.XML [®] , or Postal Wizard	Mail.dat [®] , Mail.XML [®] , or Postal Wizard
Start-the-Clock	NA	Available
Full-Service ACS (address change)	NA	Available

Getting Started With Intelligent Mail

It's time to get started on your implementation plans for Intelligent Mail.

The following will provide you with the process steps to establish a foundation for moving forward with Intelligent Mail.

1. Work with your stakeholders (software providers and customers) to determine Intelligent mail capabilities and needs

Software Provider What capabilities can their software support?	Your Customers What are their plans for Intelligent Mail?
<i>Does the software support Mail.dat, Mail.XML or both?</i>	<i>Will I be requesting MIDs for my customers?</i>
<i>Does the software support creating and tracking of unique serial numbers for mailpiece, handling units and containers?</i>	<i>What additional features/services are available?</i>
<i>Does the software support the Basic Option and Full-Service options?</i>	<i>What are my Mailer ID plans? Will I use my own or will I be using my customers MID?</i>
<i>What is the recommended approach for setting software parameters for Basic and Full Service?</i>	<i>What additional features/services are available?</i>
<i>How the does the software support BY/For relationships?</i>	<i>What are my Mailer ID plans? Will I use my own or will I be using my customers MID?</i>

2. **Review Guides and Specifications** – The following documents are recommended reading for getting started with Intelligent Mail. For reference, “[A Resource Map to Intelligent Mail Documents](#)” lists all the documents, guides and source materials that you will need in transitioning to Intelligent Mail services.

Guides & Specifications:

- [A Beginners Overview to Intelligent Mail Services](#)
- [A Guide to Intelligent Mail for Letters and Flats](#)
- [Test Environment for Mailers \(TEM\) Guides](#)
- [User Access to Electronic Mailing Information and Reports Guide](#)

If you are developing your own software, reference the following guides and specifications:

- [Postal Service Mail.dat Technical Specification](#)
- [Postal Service Mail.XML Technical Specification](#)

Resources:

- Postal Service District Business Mail Entry at: <http://www.usps.com/ncsc/locators/find-bme.html>
- Postal Mailpiece Design Analyst at: 855-593-6093 or mda@usps.gov
- *PostalOne!* Help Desk at: 800-522-9085 or postalone@usps.gov

3. **Acquire a Mailer ID(s)** – A Mailer ID (MID) is required when constructing all IMBs, including IMBs for mailpieces, handling units, and containers. For Intelligent Mail Basic or Full-Service, the MID can be owned by the Mail Owner, Mail Preparer, or any Stakeholder in the supply chain.

MIDS are also used to send information to the Mail Owner or Mail Service Provider regarding Intelligent Mail Full-Service mailings. Participation in Intelligent Mail Full-Service requires that both the Mail Owner and Mail Service Provider be identified for all Full-Service mailpieces (other than MLOCR exceptions). Identification can be through a MID or a Customer Registration ID (CRID), as assigned by USPS in accordance with its application process.

The “**MID/CRID Acquisition Quick Step Guide**” provides instructions for the following scenarios by which a Mail Owner or Mail Service Provider can acquire MIDs and/or CRIDs.

What would you like to do?	If you are a...	You will be able to...	You will receive...	Use these instructions
Acquire a single MID/CRID	Mail Owner	Go to the USPS Web Portal on the Business Customer Gateway and request the MID/CRID	A MID and CRID from BCG	Single MID Generation via Business Customer Gateway
Acquire multiple MIDs/CRIDs using a manual process	Mail Owner or Mail Service Provider	Download the MID/CRID Excel spreadsheet from the RIBBS webpage, enter in Mail Owner information and submit	Up to 500 CRIDs and/or MIDs on behalf of others	Bulk Acquisition via Manual Data Request
Acquire multiple MIDs/CRIDs using Mail.XML	Mail Owner or Mail Service Provider	Submit a Mail.XML request message to acquire multiple MIDs/CRIDs	Multiple MIDs on behalf of others	Bulk Acquisition and Verification via Mail.xml
Validate MID/CRID ownership	Mail Owner or Mail Service Provider	Submit your request through BCG or Mail.XML message	Review of validation on screen or message from Mail.XML	Validating CRIDs and/or Nine-Digit MIDs

4. Plan and Build your Barcode – If you are generating the IMb mailpiece barcode, handling unit (sack or tray label) barcode, and/or container label barcode on your own, you will need to do the following. For additional assistance, reach out to your Mail Service Provider.

a. Obtain IMb software and fonts

Intelligent Mail® barcode software and fonts can be acquired by going to:

<https://ribbs.usps.gov/onecodesolution/download.cfm>

b. Obtain Barcode Identifier

Barcode IDs can be acquired by going to:

https://ribbs.usps.gov/intelligentmail_mailpieces/documents/tech_guides/BarcodeIdentifier.pdf

c. Plan for Services (Service Type Identifiers)

STIDs can be acquired by going to:

https://ribbs.usps.gov/intelligentmail_mailpieces/documents/tech_guides/stid.pdf

d. Acquire a Mailer ID(s) from the Postal Service (see acquisition processes on page 3 and reference the “**MID/CRID Acquisition Quick Step**”).

e. Validate and Test barcode

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5. Plan for Feedback for Full-Service - The Full-Service program, through the *PostalOne!* system, provides change of address and Nixie Detail data (ACS); Start-the-Clock (STC); and Container Visibility data. Full-Service Feedback can be obtained through online reports in the *PostalOne!* system or through the use of Mail.XML messaging.

Things to consider when planning feedback include:

- Who will receive the data?
- How will the data be received?
- How will address lists be updated?
- How will Start-the-Clock and address correction information be used?
- Will I need ACS data on every mailing?

The data recipients for Full-Service Feedback are outlined below. Mail Owners receive the Address Correction Change of Address and Nixie data, Start-the-Clock and Container Visibility data. Mail Preparers receive the Start-the-Clock and Container Visibility data. Mail Owners can grant data access to third-parties through relationship profiles in the Mailer ID System. Address Correction (ACS), Start-the-Clock (STC) and IMb Tracing feedback can be delegated to a third party using the MID profiles.

Full-Service Feedback Recipients	Mail Owner	Mail Service Provider
ACS COA	X	
ACS Nixie	X	
Start-The-Clock	X	X
Container Visibility	X	X

The MID owner can delegate the MID profile to another party by logging onto the Business Customer Gateway through the following link: <https://gateway.usps.com/bcg/login.htm>. Once a Mail Owner has logged on utilizing their user name and password, they can click on "Mailer ID" and "Add Profile" to select one of five options that describe to whom MID-specific data should be disseminated.

There are five types of data delegation profiles a Mailer Owner can establish:

1. No data distribution - This is the default setting when a MID is created. The Mail Owner identified in the eDoc receives Full-Service ACS and Confirm data, the Mail Owner and Mail Preparer receive Full-Service Start-the-Clock and Container Visibility data.
2. Send data to the Mail Preparer. A Mail Owner may authorize a Mail Preparer to receive the data associated with all mailings that specific Mail Preparer creates.
3. Send data to the holder of the MID on the mailing. When this option is active (the Mail Owner MID is used to identify the Mail Owner in the eDoc), the system will route data to the Mailer ID on the mailpiece.
4. Send data to Other – Single Recipient allows the user to select one data recipient.
5. Send data to Other – Multiple Recipient allows the user to select one or more data recipients.

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The **User Access to Electronic Mailing Information and Reports Guide** provides the details for receiving Full-Service Feedback.

6. **Design and Test Electronic Documentation** – Electronic documentation (eDoc) is a crucial step in your participation in Intelligent Mail. Mailers new to eDoc must complete a validation process in a test environment prior to sending electronic files to the USPS production environment. Electronic documentation generates postage statements and supporting documentation that are critical to mailing with the U.S. Postal Service system. The Test Environment for Mailers (TEM) is designed to allow practice and testing for the ability to send electronic documentation to the USPS.

There are different requirements electronic documentation for the Basic option and Full-Service option.

Intelligent Mail Options	Methods for Submitting Documentation	Electronic Documentation
Basic	<ul style="list-style-type: none"> o Mail.dat o Mail.XML 	Optional, if provided the eDoc must include: <ul style="list-style-type: none"> o Postage Statement Information o Aggregate mailing data such as a USPS Qualification Report
Full-Service	<ul style="list-style-type: none"> o Mail.dat o Mail.XML o Intelligent Mail Small Business Tool o Postal Wizard (< 10K pieces maximum for Full- 	eDoc required and must include: <ul style="list-style-type: none"> o Postage statement o Aggregate mailing data and piece detail mailing data o Mail owner, mail preparers o Intelligent Mail barcodes on mailpieces, trays and containers

	Service and documentation is not required)	o Nesting relationships
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7. Test for Full-Service, if applicable

Once the following steps have been completed, you are ready to present your clients mail with the Intelligent Mail barcode, under the Basic or Full-Service option.

- ✔ Worked with your stakeholders, Software Provider and Customers, to determine Intelligent mail capabilities and needs
- ✔ Reviewed Guides and Specifications
- ✔ Acquired a Mailer ID(s)
- ✔ Planned Barcode
- ✔ Planned Feedback
- ✔ Designed and Tested Electronic Documentation