UNITED STATES POSTAL SERVICE ®

Guide to Accessing
Move Update Reports
Updated June 2009

Table of Contents

1   Introduction to Move Update Feedback

The Postal Service has implemented standards for First-Class Mail® Discount Price mailings and all Standard Mail mailings to require that addresses used on pieces within a mailing must be updated through an approved Move Update method within 95 days prior to the date of mailing. Approved Move Update methods are outlined in Publication 363, Updating Address Lists is a Smart Move, available on the Address Management Communications Website RIBBS™ Move Update web page

The Postal Service has developed a Move Update verification process that will use live samples from the mailing. Initially, the Postal Service will share the results of the verifications and work with mail owners to improve mail addressing quality. Beginning January 2010, we will use this information to assess additional postage on noncompliant First-Class Mail and Standard Mail mailings.

The verification process is used to evaluate the use of Move Update change-of-address information for discounted First-Class Mail and Standard Mail letter and flat mailings using the *PostalOne!* system. At business mail acceptance, a sample is selected from the mailing for processing on the Mail Evaluation Readability and Lookup Instrument (MERLIN). In addition to the current verifications performed, the MERLIN machine will capture barcode, name and address information into a data file that is electronically transmitted to the National Customer Support Center (NCSC). The NCSC processes the data file using NCOA$^{Link®}$ and returns results to the *PostalOne!* system and the results are presented in a Move Update report. This process is completed before the postage statement is finalized in the *PostalOne!* system so that the results of the report can be discussed with the mailer. Pieces with addresses for which a change-of-address order is found are identified by a MERLIN mail piece ID and can be pulled from the MERLIN sample and provided to mailers. Additional information on the Move Update verification process can be found in the Mailer Advisement Policy and the FAQs posted on the RIBBS – Move Update page.

Move Update verification reports/worksheets are a part of the *PostalOne*! Performance Based Verification process recently deployed to field acceptance sites. The reports are available to a mailer whose mailings are processed on MERLIN. Move Update verification results are displayed in three places:

► *PostalOne!* Move Update Report
  Associated with a postage statement
  – Move Update verification results are available by postage statement via a *PostalOne!* worksheet
  – Results are displayed within minutes of performing a MERLIN verification
  – Worksheet is viewable on the transaction page in *PostalOne!* for an individual postage statement for which the verification was performed.
  Associated with continuous mail operation
  – Move Update verification reports are also available for mailers that have been identified as continuous mailing operations.
  – Reports are available through the dashboard "View Verification Results" button.

► MicroStrategy Move Update Report
  – Move Update verification results are aggregated and displayed across mailings via the MicroStrategy tool.
  – Results are compiled and updated overnight

To view Move Update reports, mailers are required to have access to the *PostalOne!* system.

2 Accessing the *PostalOne!* System

2.1 PostalOne! System Additional Program Information

Contact your local Business Mail Acceptance Unit to gain access to *PostalOne!* and to confirm that your local acceptance site is capable of providing Move Update verifications. You can learn more about *PostalOne!* at www.usps.com/postalone. Select the **Learn More** button on the right under New Customers. There, you will find additional information about the program and application process.

If you have questions, call your local Business Mail Entry Unit (BMEU) or contact your local Mailpiece Design Analyst (MDA) for assistance. If you do not know the location of your BMEU or your local MDA you can use the following links.

        BMEU   -   http://www.usps.com/ncsc/locators/find-bme.html

        MDA   -   http://www.usps.com/replymail/mailpiece.htm

3 Accessing the *PostalOne!* System Move Update Verification Reports

3.1 Move Update Verification Results

Move Update Verification Results are reported on either an individual postage statement basis as presented on the transaction page or the results are aggregated and displayed across mailings in a Microstrategy reporting structure. in the *PostalOne!* system. Results are compiled and updated overnight. To view Move Update reports, mailers are required to have access to the Business Customer Gateway.

Mailers whose detached mail unit operations are defined by the Postal Service as continuous mailing operations have access to the Move Update verification results through a "View verifications" button on their dashboard. Instructions for accessing the Move Update reports for continuous mailing operations is provided in section 3.3 below

To access the Verification Results, a user must first request the *Manage Mailing Activity* service using the Business Customer Gateway Request Access feature. Once the request for the Manage Mailing Activity access is approved by the Business System Administrator (user will receive a notification by email), the user then logs in to the Business Customer Gateway and can follow the instructions below to access the Move Update verification reports.

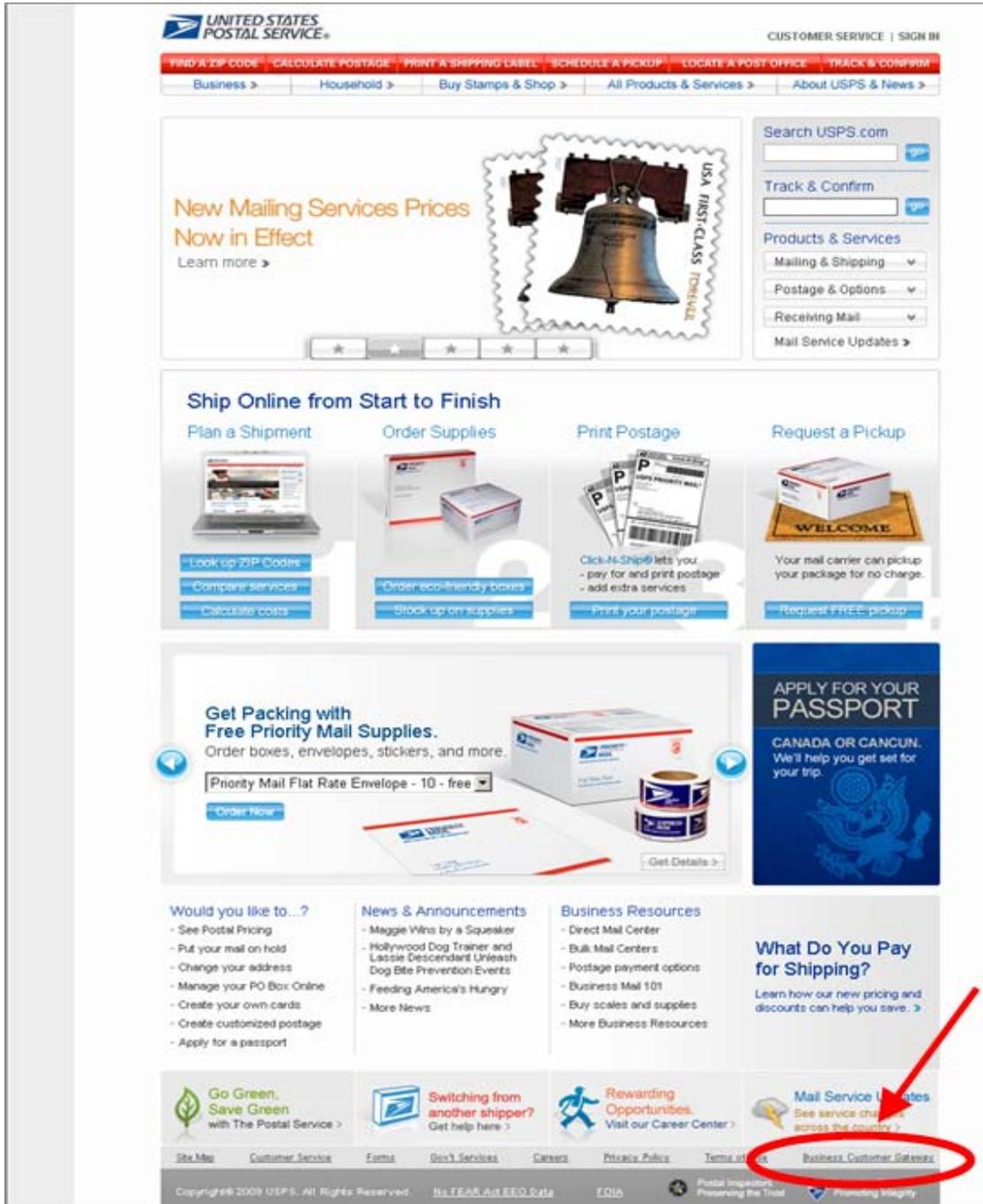On usps.com scroll to the bottom of the page and click on Business Customer Gateway

Figure 3.1 USPS.com access to Business Customer Gateway

On the Business Customer Gateway page, authorized users can login to their account using their assigned username and password.

Figure 3.2 – Login to Business Customer Gateway

After logging into the Business Customer Gateway, click on Mailing Reports link under the Track and Report section as shown in figure 3.3.

Figure 3.3: Business Customer Gateway user homepage

On the Manage Mailing Activity page, click on View Transactions link as shown in figure 3.4.
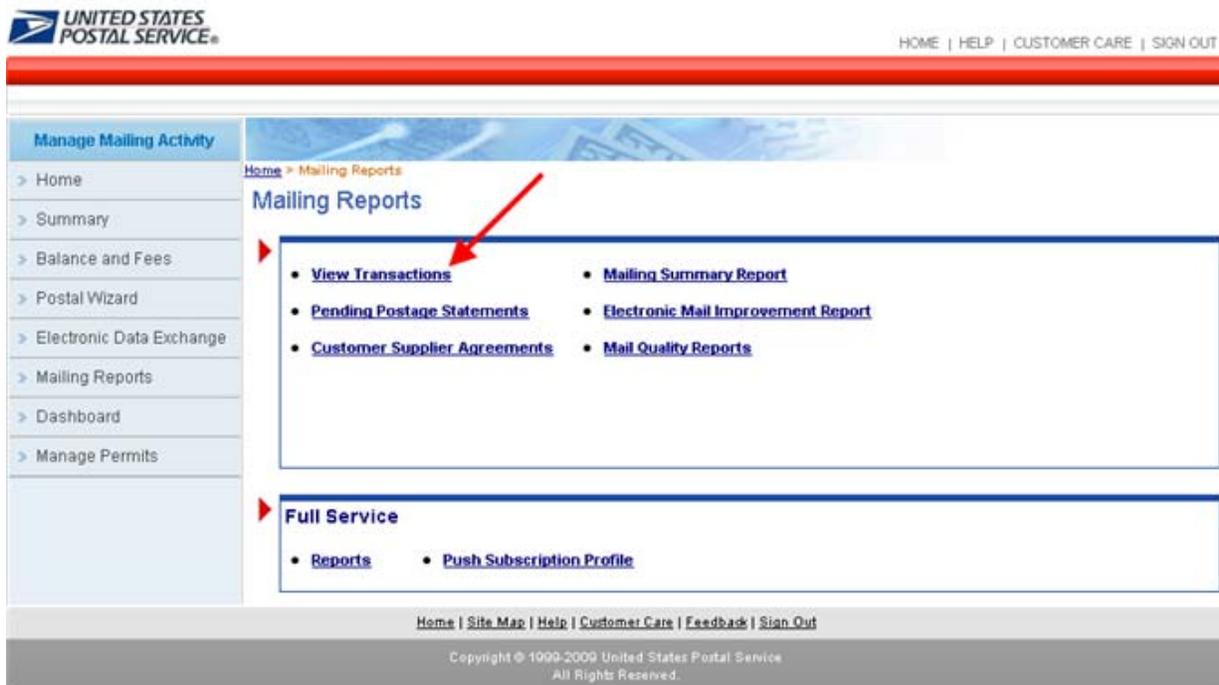
Figure 3.4 – Mailing Reports and View Transactions

`

On the transactions page you can search for postage statements using the filters in the upper section of the page. In the "Verifications" column, you will find links to reports whenever a worksheet has been completed for the verification. In the image below, you can see three verification reports for the postage statement, ME (MERLIN), MU (Move Update) and DP (Delivery Point Validation). The user can click on any of the links in the "Verifications" column to access the underlying results. The following types of verifications are available:

- ME = MERLIN
- MU = Move Update
- PS = Presort
- BP = Bundle Preparation
- SP = Short paid (for First-Class Metered mailings)
- TT = Tap Test (for mailings with windowed envelopes)

Figure 3.3 – Transaction Page

Clicking on one of the 'MU' verification report link in the column will open the report. In figure 3.4, we show the Move Update verification report. Other verification reports are provided as shown in the verification column

Mailing's Move Update Address Validation Report

Mailing Information

Permit Holder's Permit:	681	Mailer's Job ID:	ALS 01	Total Pieces:	25,524
Permit Holder's Name:	AT&T	Postage Statement ID:	66406014	Total Postage:	11692.4
Mailing Agent's Permit:	681	Mail Class:	First Class	Mailer MPTQM Certified:	
Mailing Agent's Name:	AT&T	Processing Category:	Letters	Move Update Method:	Ancillary Service Endorsement

MERLIN System Information

MERLIN Job ID:	2243203	Cost Center Name:	PHOENIX BMEU	MERLIN Verification Run:	
MERLIN Serial #:	MER-00-0864	MERLIN Verification Sample Size:	1,180	Start Date/Time:	03/05/09 06:42:00 PM
Cost Center Code:	0363640960	MERLIN Verification Mailpieces Processed:	0	End Date/Time:	03/05/09 07:18:02 PM

Move Update Address Validation Summary Information

Total # of mailpieces tested:	1180			

Ranges	Total COA on File	Total COA updated by mailer	Total COA not updated by mailer	Total COA updated by mailer divided by Total COA on File
Less than 95 days	0	0	0	100.00 %
Between 95 days to 13 months	0	0	0	100.00 %
Between 95 days to 18 months	0	0	0	100.00 %
Between 95 days to 48 months	1	0	1	0.00 %

* COA = change of address

Move Update Error Identification

* Table displays mailpieces with Move Update address matches between 95 days and 48 months

MERLIN MPID	Name	Address Block	Barcode	Range	COA Date
646	SAFEWAY	3607 PO BOX MANASSAS VA 201080972	20108097207	Between 18 months to 48 months	03/01/07

Print Form

Figure 3.4 – Move Update Report

3.2 Move Update Worksheet Explanation
The following explanation is meant describe the elements that are shown in the rows and columns of the Move Update report.

The "Mailing Information" section of the Move Update report displays mailer profile and account information as recorded on the postage statement.

The "MERLIN System Information" section displays information about the MERLIN run.

The "Move Update Address Validation Summary Information" section displays the results of the verification. This includes

1. Total # of mailpieces tested – Number of mailpieces that were processed for Move Update out of the MERLIN sample.

2. Ranges - The first column displays the date ranges for the change of address (COA) information: Less than 95 days, 95 days to 13 months, 95 days to 18 months and 95 days to 48 months.

3. Total COA on File - The second column provides the number of mailpieces within the sample identified with a COA by the given date range.

4. Total COA Updated by Mailer - The third column provides the number of mailpieces with a COA on file for which the mailer updated the address on the mailpiece.

5. Total COA Not Updated by Mailer - The fourth column provides the number of pieces identified with a COA on file for which the mailer did not update the address and the old address was used on the mailpiece.

6. Total COA Updated by Mailer Divided by Total COA on File - The fifth column provides the percentage of pieces that were updated by the mailer within the given date range. The percentage is determined by dividing the value in column 3, Total COA updated by mailer, by the value in column 2, Total COA on file. This provides the percentage of mailpieces that was updated by the mailer within the sample tested on MERLIN. This is the verification passing percentage.

When *Fastforward*® or 'Multiple' method is checked on the postage statement, the acceptance clerk will enter the method in the *PostalOne!* system and the system will use the 95 days to 13 months date range for the passing percentage. When any other method is checked on the statement, the acceptance clerk will enter the method in the *PostalOne!* system and the system will use the 95 days to 18 months date range for the passing percentage.

The information for less than 95 days and from 95 days to 48 months date ranges is provided as information only. If pieces are found to have a COA that is over 18 months, they may not be deliverable. Mailers may want to consider having their address file processed by a vendor using the NCOA[Link] 48 month database to identify and purge questionable addresses.

The "Move Update Error Identification" section at the bottom of the report displays information for the mailpieces that were identified with a COA on file between 95 days and 48 months for which the updated address was not applied. This information includes the MERLIN mailpiece identification number, the name as found on the piece, the address as found on the piece, the numerical interpretation of the barcode on the piece, the date range for the COA and the actual date for the COA.

3.3 Continuous Mailing Operation Access to Move Update Verification Report

The following screens show how a mailer with an operation defined by the USPS as a continuous mailing operation can review verification results generated during sampling of their mail.

Continuous Mailers are defined as mailers who continuously produce mail (over a varying timeframe) and release it for transport at different intervals, while verification is performed by sampling portions of the mail prior to completion of the entire mail job. In these continuous mailing operations, verification results are not associated with a specific postage statement. Move Update reports are only available on First-Class Mail and Standard Mail mailings which are verified via MERLIN equipment.

1. The user selects *Dashboard* from the Manage Mailing Activity left-hand menu (Figure 3.5). The Dashboard Management System displays, where the user then selects *View Verification Results* link underneath the search page (Figure 3.6). If the link is not present, then no verification results are available.

Figure 3.5 - Manage Mailing Activity – Select Dashboard Link

From the Dashboard click in the "View Verification Results" button

Figure 3.6 – Dashboard View Verification results

On the View verification results page you will be able to see the verifications listed in the Verifications column. Clicking on the 'MU' verification link will open the report as shown in figure 3.4 shown above.

4 Accessing the PostalOne! Move Update MicroStrategy Reports

Aggregated reports are also provided for mail owners and mail preparers through a MicroStrategy application. The reports are accessed by clicking on the 'Reports' link in the left hand menu after accessing the Business Customer Gateway as shown in figure

Figure 4.1 – Business Customer Gateway

On the mailing reports page, select Mail Quality Reports as shown in figure 4.2
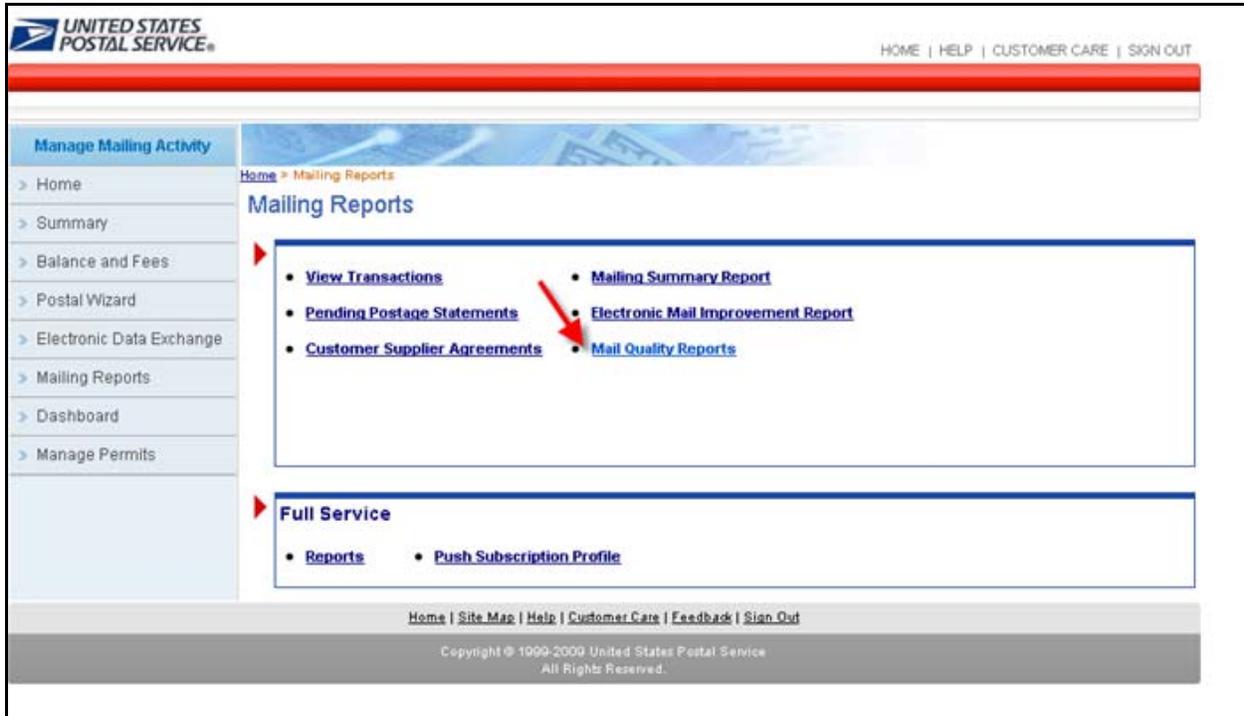

Figure 4.2 – Mailing Report screen

Selecting Mail Quality reports will take you to the MicroStrategy reporting tool. A list of Mail Quality reports is available in the Shared Reports folder. Click on the Shared reports folder to access the reports as shown in figures 4.3 and 4.4.

MicroStrategy will allow you save reports so that you can come back and run them without having to re-select report prompts. These saved reports are then accessible through the My Reports folder. To Save a report, use the File menu.

A Subscription can be assigned for any Saved reports. A subscription tells the system to process a saved report on a regular frequency and places the report in the Subscriptions folder.
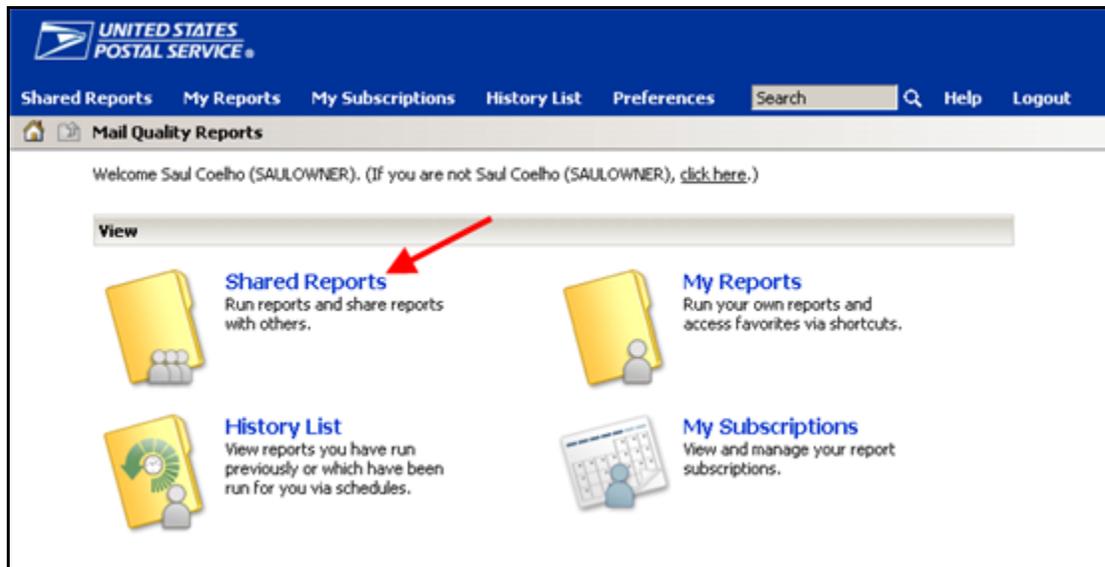
Figure 4.3 – Mail Quality reports folder

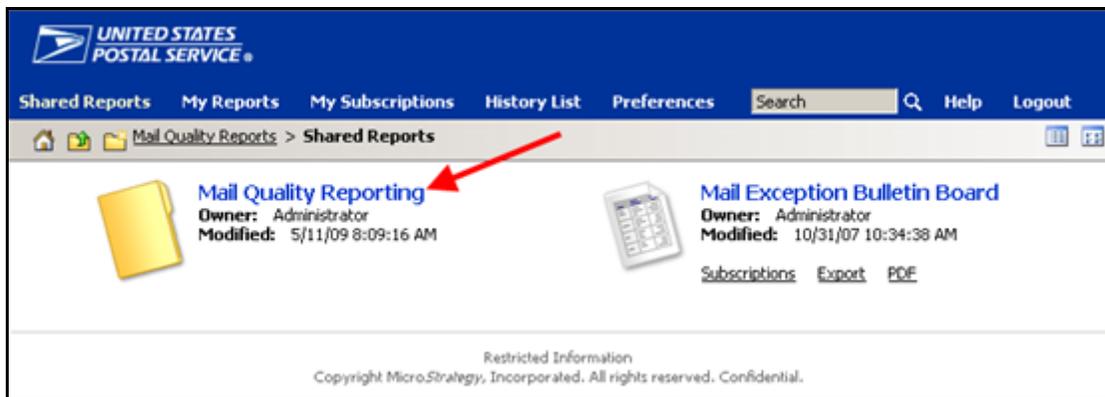Click on the Mail Quality Reporting folder

Figure 4.4 Shared Reports folder

Several report options are available under the Mail Quality Reporting folder. The Address Quality report contains Move Update verification results. Click on the Address Quality report.

Figure 4.5 – Mail Quality reporting Folder

MicroStrategy provides a list of "Prompts" in the left-hand shaded column. You must select a "Location" as shown in the figure below. By selecting "All Areas" the report will show all locations where you deposit mail.

The "Select Date Range" prompt defaults to the "last 30 days". You may click on the Select Date range prompt and select another option if you wish.

The "Select Mail Class" prompt defaults to All Mail Classes but you may click on the prompt and select another option if you wish.

The "Processing Category" prompt defaults to All Processing Categories. You may click on the Processing Category prompt and select another option if you wish.

The Selection is added by clicking on the selection in the "Available" box and clicking on the right pointing arrow to move the selection to the 'Selected' box as shown in Figure 4.6.
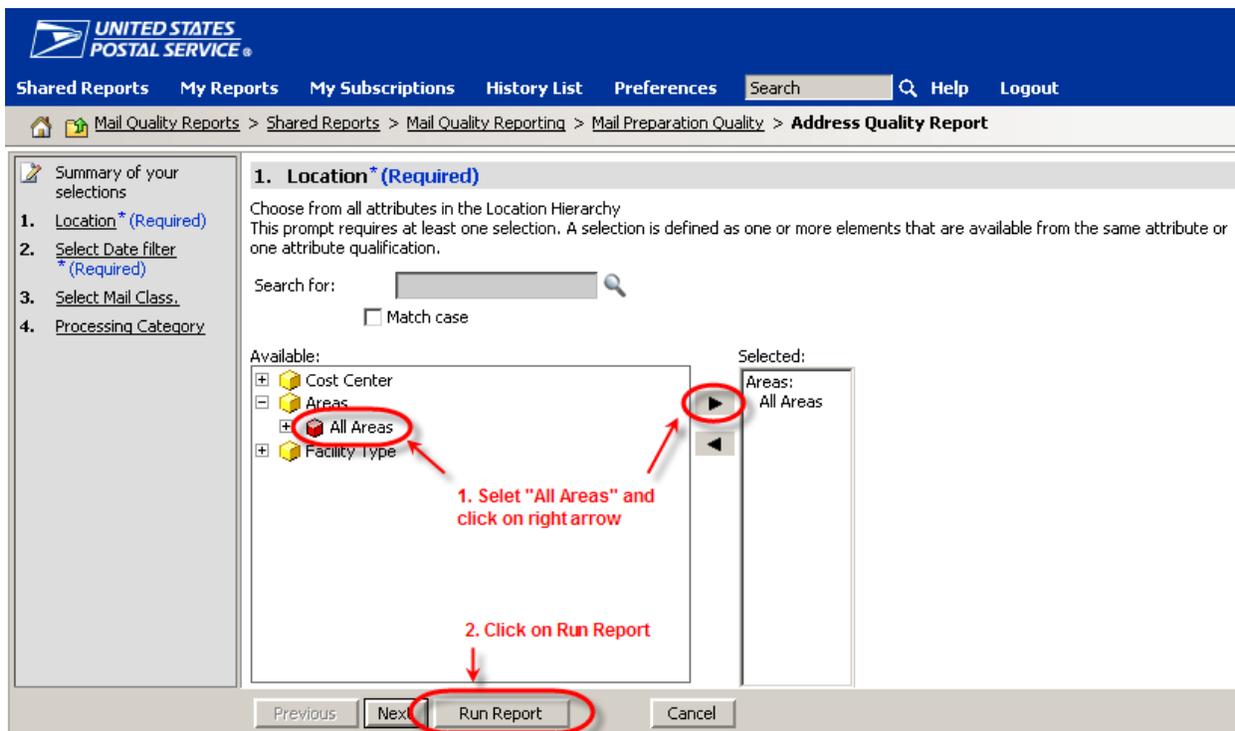
Figure 4.6: MicroStrategy Mail Quality Reports Selection Criteria

After clicking on 'Run Report" the system will begin processing the report request. The Address Quality Report will be displayed as shown in Figure 4.7.

Facility	Metrics	Total Pieces Sampled	Total Pieces with Delivery Point Validation Issues	Total Pieces with Move Update Issues
SOUTHERN MARYLAND		117,009	271	301
NORTHERN VA		88,722	236	196
SUBURBAN MARYLAND		77,545	149	152
Total		283,276	656	649

Figure 4.7 – Address quality report display

Figure 4.7 – Address Quality Report (Summary View)
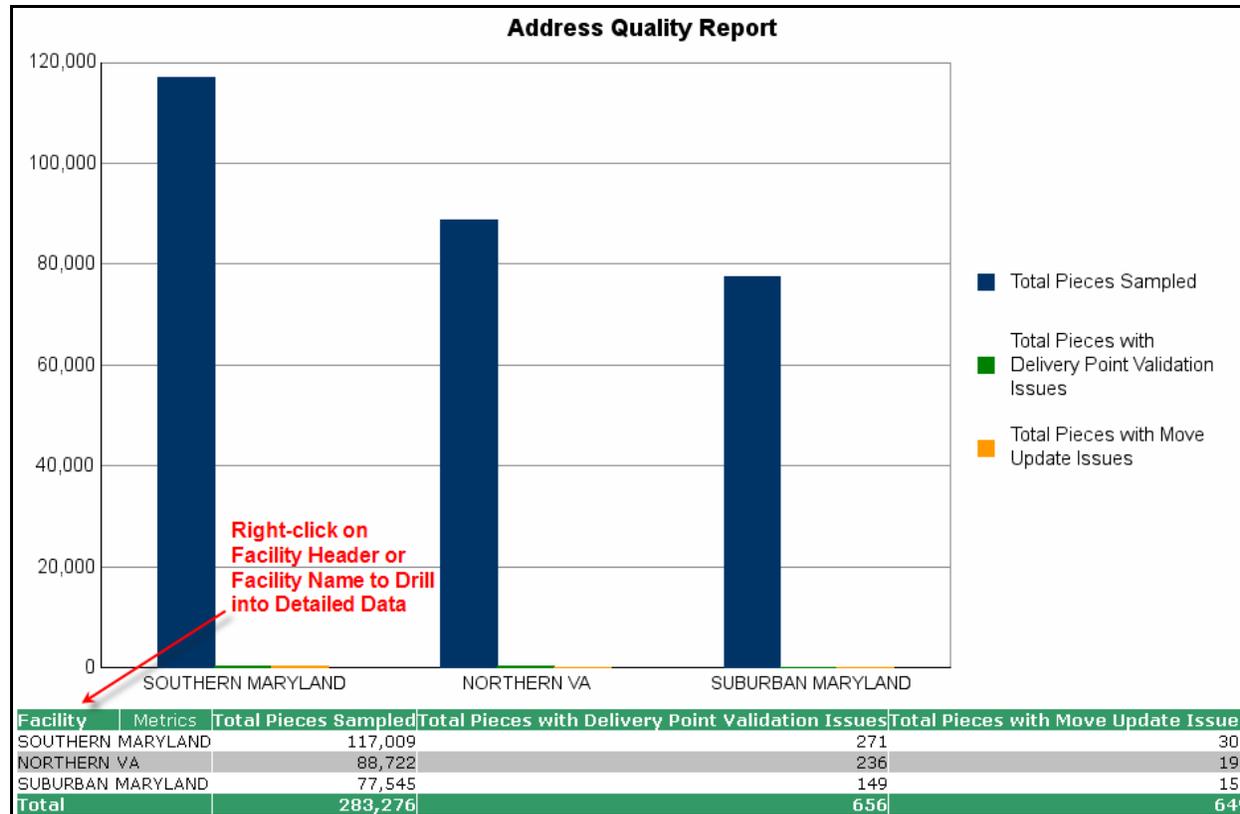
Placing the cursor on the 'Facility' column header and clicking the right mouse button will display new menu selections. The 'drill' option will allow the user to select 'Move Update Issues Breakdown' to review a further breakdown of the Move Update verification results.

Below is a detailed view of exactly how this drill functionality appears in MicroStrategy when a right-click is used on the Facility column:

Facility	Metrics	Total Pieces Sampled	Total Pieces with Delivery Point Validation Issues	Total Pieces with Move Update Issues
SOUTHERN MARYLAND			271	301
NORTHERN VA			236	196
SUBURBAN MARYLAND			149	152
Total			656	649

Drill ▶
⊞ Delivery Point Validation Issues Breakdown
⊞ Move Update Issues Breakdown
Area
District
Finance Number
More options…

Figure 4.8: MicroStrategy Report – Move Update Issues Breakdown – Mail Owner & Mail Preparer View

    By clicking on the underlined "Facility" name (Portland) shown in the table at the bottom of the report in Figure 4.8, the system will drill to the table as shown in Figure 4.9. Alternatively, you may right mouse click on the "Facility" column and a menu will appear. Click on "Drill" and the table shown in Figure 18 will be displayed.
After using this drill functionality to access the Move Update Issues Breakdown, the system will display the breakdown as shown in Figure 4.8.

Figure 4.8 – Address Quality Breakdown – Move Update

Figure 4.9, displays the mailpieces that had a Change of Address on file that was between 95 days and 18 months and the old address that was used on the piece. As shown in the Figure, the Postage Statement ID will be displayed for each piece in an individual mailing. The table will also show the Date of Mailing, the Mail Class and Processing Category Verification Facility, the Address as it appeared on the piece, the date of the change of address and the number of days between the date of mailing and the change of address date.

Figure 4.9: MicroStrategy New report – Address Quality Report (details view) – Mail Owner & Mail Preparer View

5 Customer Care Center

Contact the Customer Care Center at 1.800.522.9085 if you have any questions on accessing your Move Update reports.