

Delivering Assessment Notices

Electronic Notices & Paper Mail

HOW TO GET ASSESSMENT TO YOUR TAXPAYER?

Option A : US Postal Service

Option B: Electronic Delivery

COST OF EACH

Traditional Mail: 50 - 60 cents

Electronic Delivery - Varies - but less!

DELIVERY TIME

Traditional Mail: 1 - 5 days

Electronic Delivery: A second (or less)

WHAT IS THE MOST EXPENSIVE PART of Traditional Mail

- Software/Data Processing - 5%
- Envelopes - 5%
- Forms - 5%
- Imaging & Mail Preparation - 15%
- **Postage - 70%**

How to save \$ with Mail

Which Category do you focus on for Cost Savings?

Postage, of Course!

How?

Postage is same anywhere in the U.S. - Right?

NO!

WHO DECIDES WHAT YOU WILL PAY FOR POSTAGE?

- USPS does NOT determine your total postage on a bulk mailing
- USPS decides only the **parameters**, i.e. the range of rates, your mail is eligible for.

Previous **INTELLIGENT MAIL BARCODE**
RATES FOR
FIRST CLASS 1oz. LETTER

RETAIL RATE = 49 CENTS

MIXED Rate = 43.5 cents

AADC Rate = 40.6 cents

3 Digit Rate = 40.6 cents

5 Digit Rate = 38.1 cents



CURRENT INTELLIGENT MAIL BARCODE RATES FOR FIRST CLASS 1oz. LETTER

RETAIL RATE = 49 CENTS

MIXED Rate = ~~43.5 cents~~ 43.9 cents

AADC Rate = ~~40.6 cents~~ 41.6 cents

3 Digit Rate = ~~40.6 cents~~ 41.6 cents

5 Digit Rate = ~~38.1 cents~~ 39.1 cents-



WHAT IS THE INTELLIGENT MAIL BARCODE RATE

The 2ND OUNCE?

FREE

(IF Prepared Correctly)!



Postage Rising

Last postage increase was
5/31/2015

Another 1st Class letter increase
coming
When?

Prepare Mail for Full Service IMb

Requirements:

- Validate Address - recognized by USPS
- Move Comply - validate Current Address
- Use USPS approved IMb postal barcode
- Prepare Mailing per full service standards

How to Avoid Postage Increase

#1 - Validate Address (CASS):

Insure mailing address is
COMPLETE & CORRECT

WHAT MAKES AN ADDRESS COMPLETE & CORRECT?

- An accurate delivery point number - '1142'
- A correct suffix - Rd, St, Ave, Blvd, etc.
- A correct directional - N, E, S, NW, etc.
- A complete apt or ste designator
- A correct city, state, or country
- **An accurate zip+4**

CASS

CODING, ACCURACY, SUPPORT, SERVICE

- CASS Software validates that the address is complete and correct (It does NOT validate the address is CURRENT!)
- Cost Range = Free - \$25,000

CHECK OUT ANY ADDRESS

<http://usps.com/>

Look up a Zip Code

Look Up a ZIP Code™

Still Have Questions?
[Browse our FAQs >](#)

By Address By Company Cities by ZIP Code™

You entered:

3121 HIGH POINT AVE
GREENSBORO NC

[Look up another ZIP Code™ >](#)
[Edit and Search Again >](#)

Here's the full address, using standard abbreviations and formatting...

3121 HIGH POINT RD
GREENSBORO NC **27407-4615**
[Show Mailing Industry Details](#)

Take a Look

Shop stamps, supplies, gifts, and more >



How to Avoid Postage Increase

#2. Comply w/USPS Move Update

Make sure address is current!

- Moved - new address is ...
- Moved - left no forwarding address
- Moved - Forwarding time expired (12+ Months)

TO ELIMINATE RETURN MAIL & QUALIFY FOR DISCOUNTS

Did the Addressee File COA?

You must mail to the new address!

*Move update (within 95 days) required
for discounted postage since 2008!*



What % of the U.S. population moves every year?

14-15% of the population moves EVERY year.

When you do the math, that's over 20 million moves every year - this is equivalent to the population in New York, New Jersey and Pennsylvania combined!



WHERE DID THEY GO?

How do you find out
if the person
you are mailing to
has moved?

#3. NCOA_{LINK}

NCOALink

Best Pre-Mail Method

Get new address within
18 months of move

NCOA_{LINK} 48 MONTHS

NCOA 48 - Even Better!

- Get move updates for up to 48 months

MOVE UPDATE PENALTY FOR AUTOMATION MAILING

Move Update required since 2008.

When did penalty begin?

Penalty started January 4, 2010

Penalty = 8 cents X up to 70% of all
pieces in your mailing!

TO ELIMINATE RETURN MAIL & QUALIFY FOR DISCOUNTS

- Restrictions against mailing to new address without taxpayer OK?
- How do you get around it?
 1. Apply for a waiver
 2. Remove from bulk mailing

How to Avoid Postage Increase

#3. You MUST use IMb Barcode



YOU MUST HAVE A USPS APPROVED BARCODE!!

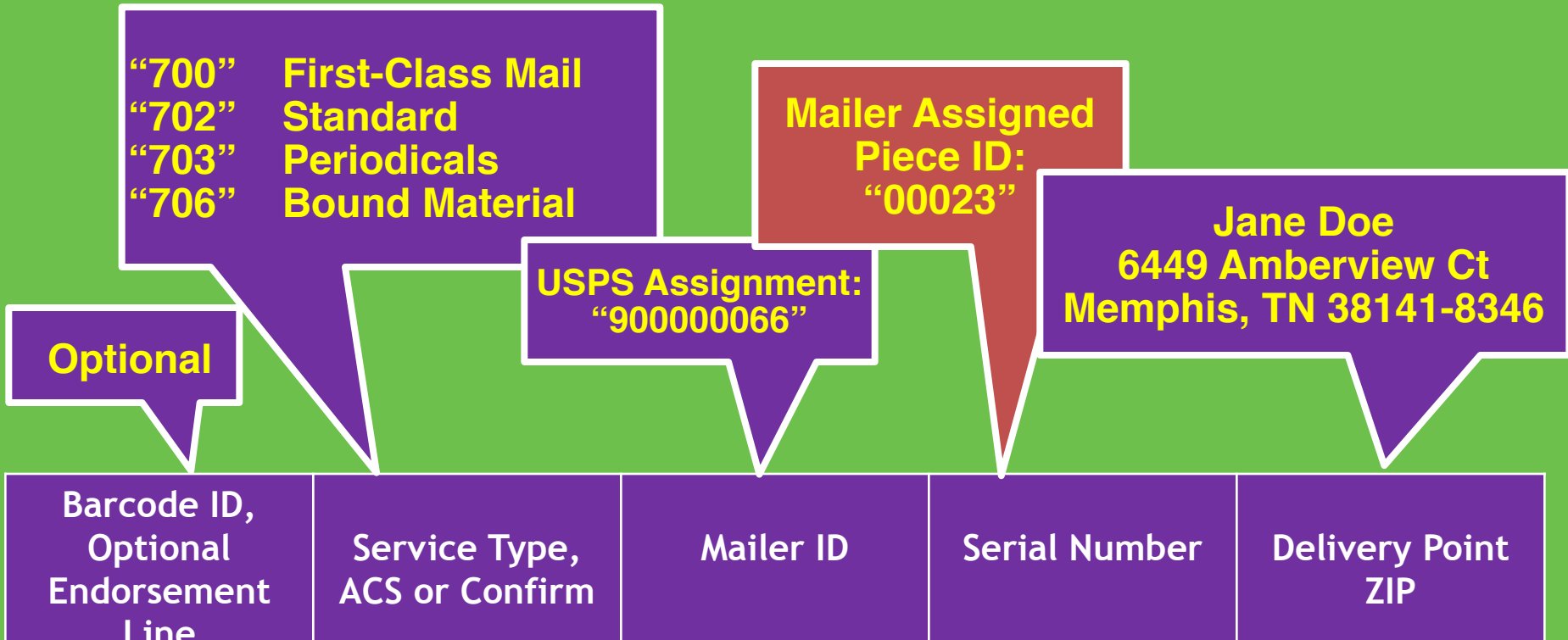
January, 2013 (Postnet Gone)



NEW REQUIRED Intelligent Mail Barcode(IMb):



Intelligent Mail Barcode



BASIC SERVICE IMb WILL SUNSET

BASIC IMb (No PieceID)
Loses Eligibility for
POSTAGE DISCOUNTS

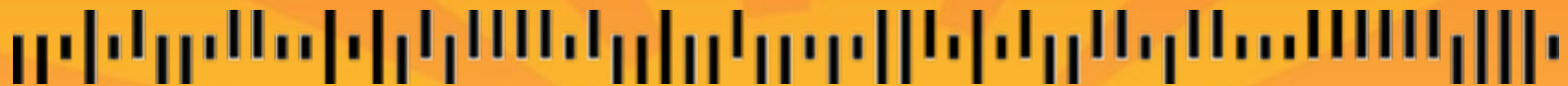


BASIC SERVICE IMb WILL SUNSET

WHEN?
~~**JANUARY 26, 2014**~~

BASIC SERVICE IMb WILL SUNSET

SOON!
ONLY FULL-SERVICE IMb Mail
WILL GET POSTAGE
DISCOUNTS



How to Avoid Postage Increase!

**#4 Prepare Mail according to
Full Service Standards**



FULL SERVICE IMB

- ❖ **Full Service Intelligent Mail**
Will get postage as low as 38.8 cents*
*(*for 5 digit presort first class)*
- ❖ **Basic Service Intelligent Mail**
will get 47.1 - 49 cents per mail piece
Difference = 8 -10.2 Cents

WHAT IS A FULL-SERVICE IMb?

1. Every Mail piece requires unique serial #
(remain unique for 45 days)

WHAT IS A FULL-SERVICE IMb?

2. Every Mail tray requires unique tray ID # -
(remain unique for 45 days)

WHAT IS A FULL-SERVICE IMb?

3. Only Electronic Documentation Accepted
The USPS is going paperless!

WHAT IS A FULL-SERVICE IMb?

Included in Electronic Documentation is:

- Total # of mail pieces presented
- Total # of trays of mail & how many in each tray
- Which zip code destination for each tray
- Which serial numbered mail pieces in each tray

John Jones - Tray 73, Piece #7



Benefit Of FULL-SERVICE?

IMb Trace -

- Know when each mail piece was first processed
- Know when each mail piece was delivered!

Do you ever hear...

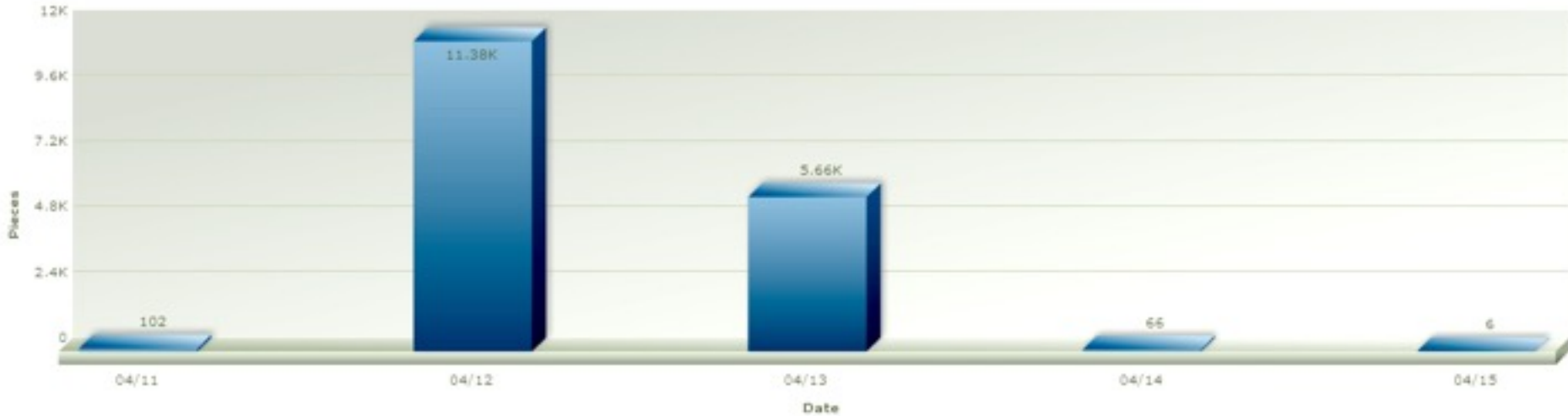
“I never received my statement”

Full Service IMb and IMb Trace will

Eliminate those excuses now!

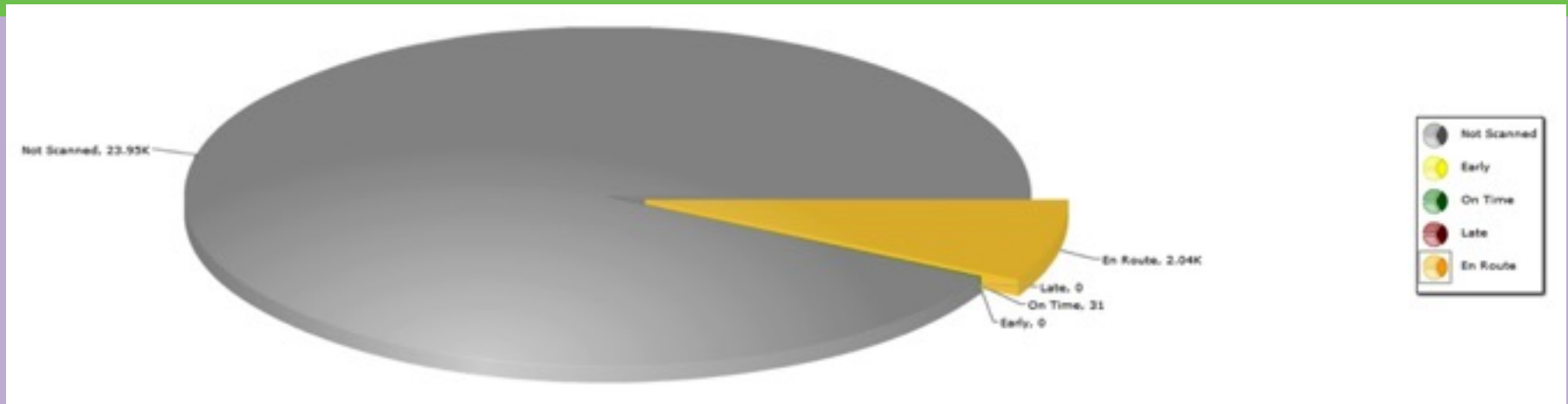


OUT FOR DELIVERY



DATE SCANNED	TOTAL
04/11/15	102
04/12/15	11376
04/13/15	5662
04/14/15	66
04/15/15	6

IN HOME DELIVERY EN ROUTE



Barcode	IM barcode Digits	User id	Last Scan Date and Time
35211691900	00270201109601149730	129-10460-00 HIBBETT SPORTING GOODS INC	2015-04-13 17:36:38.0
33028315271	00270201109601149634	020-00299-00 MERCADO BRUNILDA	2015-04-15 10:47:37.0
78654364007	00270201109601150721	001-00162-00 KOESTER ARLENE A TRUSTEE	2015-04-13 17:34:27.0
42629674665	00270201109601149785	029-40400-00 PHILLIPS RONALD R	2015-04-15 06:47:41.0
92399196617	00270201109601150863	029-53056-00 WHITE MARJORIE SHAFFER	2015-04-13 17:34:43.0

How Do You Verify?

Is this a Full Service Intelligent Mail Barcode?



?Who knows?

IN ORDER TO AVOID COMING POSTAL INCREASE

You Must:

1. CASS validate
2. Move Update
3. Use IMb barcode
4. Prepare Mailings **FULL Service**

ALTERNATIVE TO USPS

Even Better!

Option B: Electronic Mail



E - STATEMENT

1. Statement is attached to an e-mail

OR

2. E-mail alert is sent to customer indicating the statement can be viewed on:

- Your website or
- On 3rd party website

ELECTRONIC MAIL

CONTINUES TO GROW



TRENDS FOR E - STATEMENTS

Recent Survey Shows Consumers Receive Bills and Statements -

- 55% via print only.
- 18% via print and electronic
- 27% via electronic billing only

CHALLENGES FOR SUCCESSFUL E - STATEMENT

1. Must get valid e-mail address
 - Use a scheduled mailing request sign up
 - Do a special mailing - bulk Standard A
2. Must Keep e-mail address current

CHALLENGES FOR SUCCESSFUL E - PRESENTMENT

3. How do you Verify Receipt?

- Did they **receive** your email?
- (Did it go to junk e-mail?)
- Did they **read** it?

CHALLENGES FOR SUCCESSFUL E - PRESENTMENT

4. How do you Suppress Printed Statement?

- Match parcel number - who knows #?
- Match by name - names don't always match

5. How do they register multiple parcels?

- Sign up for one parcel at a time?

ADVANTAGES FOR E - STATEMENTS

1. Lower cost -
 - be careful - maybe not
 - Investment to get to lower cost
2. Instant delivery
(If good e-mail address!)
3. Tend to also pay electronically

AVOID MAILING VIA USPS

Why Don't you eNotice Now?

- ❖ You don't have email address
- ❖ Customer didn't request it
- ❖ You have no efficient way to do it

AVOID MAILING VIA USPS

How to get email address?

ASK for it!

- At time of sale of property - but
 - Will it be accurate?
 - Will it be current?
- Through your website
- When you mail Tax notice to them

AVOID MAILING VIA USPS

MUST Do's

- ✓ Verify email is accurate
- ✓ Verify taxpayer matches parcel #
- ✓ Get their agreement to email statement

AVOID MAILING VIA USPS

You Should Do's

- Not allow them to search for their parcel by name
 - How many John Smiths?
- Not allow them to search by parcel #
 - What happens if they key in wrong #?

AVOID MAILING VIA USPS

You Should

- Allow them to register ALL their parcels at the same time!
- Allow them to opt out of email
- Do Not provide both Paper & Electronic to same taxpayer

AVOID MAILING VIA USPS

You Should

- Allow them to register for tax statement
AND
assessment notice at same time
- Allow them to pay their tax online as soon as statement is received.

AVOID MAILING VIA USPS

- Allow them to view an exact replica of their notice that was mailed
 - It looks familiar
 - County Staff can better help
 - Allows them to download & print - pay through USPS mail or in person.

AVOID MAILING VIA USPS

You Should

- Not continue to email when they no longer own that parcel
- Allow the new owner to sign up for paperless statement for that parcel

AVOID MAILING VIA USPS

You Should

- Use same email system to send out 2nd half reminders and delinquent notices
- Have an accurate reporting system to know who got paper - who got email

AVOID MAILING VIA USPS

- Verify the email was delivered
 - Did you get a bounce-back?
 - Print and mail if email is not delivered
- Do Not accept the excuse - “I never received eNotice!”
 - You can verify Received & Read

AVOID MAILING VIA USPS

You Should

- Have a 24/7 help system (online) that provides assistance to those who need help
- Avoid a myriad of problems
 - Use a single service to deliver both print and electronic!

THANK YOU!!

Questions?

JIM COTÉ - PRESIDENT

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