

## The Intelligent Mail Barcode (IMb)

The U.S. Postal Service announced the **Intelligent Mail barcode (IMb)** is scheduled to replace the current PostNet mail barcode on January 28, 2013. To continue qualifying for “automation” postage discounts, the **IMb “basic”** version is required starting **January 28, 2013** increasing to a “**full service**” requirement by **January 2014**.

From **POSTNET™...**



...To **IMb™**



Prior to the IMb, The USPS was never great at identifying their in-process mail volumes by class. Neither could they track individual mail pieces as it moved onto transportation, into processing facilities, onto sorting machines or out for final delivery. In 2006, Congress mandated greater reporting and visibility for mail processing. Early IMb adapters gave the USPS greater insight into problems with their transportation network and plant operations. This has already paid dividends in faster mail delivery even as the USPS consolidates facilities.

**What does the Intelligent Mail barcode (IMb) do that PostNet does not?** It adds **mail class identification** (First Class, Standard, Periodicals), **optional preparation information** (Carrier Route, 5-digit, 3 digit, Area and Mixed Area Distribution), creates **unique tracking for each piece** and **identifies the mail owner or preparer** (which may be different from the return address). Also, the IMb **includes ZIP code destination information** as did the PostNet barcode, but PostNet barcodes ONLY included the destination coding.

If you strive for postal automation discounts, now is the time for Lodges to apply for their USPS **Mailer Identification (MID)** number. This 9-digit number is required to print the IMb on labels or envelopes. Many Lodges have used the Elks Grand Lodge Headquarters **Mailer ID (MID)** in CLMS2pc as we ramped-up our IMb capability. Now this Elks HQ Mailer ID will be restricted. **Your Lodge must obtain its own from the USPS online** if you intend to produce “automation” mail. Go online to <http://1.usa.gov/QrlzCc> for instructions or to view a PowerPoint demonstration <http://1.usa.gov/PUsf6>. You will also acquire a **CRID** or **Customer Registration ID**. It ID’s your Lodge’s physical location and is linked to your MID. *If you need assistance, call a USPS Mailpiece Design Analyst (MDA) at 1-(855)593-6093 or email [mda@usps.gov](mailto:mda@usps.gov).*

The IMb requirement is really an option, but one to be taken seriously. You do not HAVE to print it, but your postage will be greater and your delivery may be slower without it. Consider the changing rates and requirements:

Standard Mail Nonprofit Letters	2012	barcode	1/28/2013	barcode	2014
Automation- ADC sort	15 ¢	PostNet	15.4¢	IMb basic	IMb full svc
Automation- 3 Digit sort	14.8¢	PostNet	15.4¢	IMb basic	IMb full svc
Automation- 5 Digit sort	13¢	PostNet	13.5¢	IMb basic	IMb full svc
Machinable- ADC (no 3/5 Dig avail)	15.6¢	(none)	16.2¢	(none)	(none)
Non-Machinable ADC sort	41.2¢	(none)	42.5¢	(none)	(none)
1 <sup>st</sup> Class Single Piece (no sort)	45¢	(none)	46¢	(none)	(none)

Nonprofit Standard Letter Mail, often used for Lodge bulletins, is 15.4¢ each in 2013 when an IMb basic barcode is used. Without the barcode, and as long as the mail pieces remain “machinable,” the same mail may cost only slightly more, 16.2¢. Aside from cost, pre-barcoded “automation” mail skips extra steps at the USPS and goes directly to destination sorting equipment. Without the barcode, “machinable” mail goes through optical character recognition (OCR) to read the address and print a postal barcode anyway. This, in turn, is used by letter sorting equipment. In contrast, pre-barcoded mail skips the OCR line and goes direct to destination sorting equipment, speeding your mail.

Our recommendation is you put an IMb barcode on all volume mail addressed from your CLMS2pc. Of course, Lodges can mail dues or news bulletins First Class instead, without a postal barcode at 46¢ each (1/28/2013 rate). Dues statements are required to mail 1<sup>st</sup> Class because they are highly personalized. If the Lodge has problems properly closing or “tabbing” news bulletins, this is a viable option as well. 1<sup>st</sup> Class mail does have quicker delivery than Standard Mail, in most cases.

## Chicago Lodge Membership System Support for the IMb (CLMS2web and CLMS2pc)

CLMS2web and CLMS2pc support the **Intelligent Mail barcode “basic.”** By December 2012, CLMS2 will support the **IMb “full service”** barcode as well. The difference between a “basic” and “full service” Intelligent Mail barcode (IMb) is not discernible to the naked eye. IMb “Full Service” encodes a different Service Type ID (see below), requires a unique Sequence number for each piece of mail, requires a special IMb tray tag, and most importantly will require electronic filing with the USPS. We will publish more on this as IMb “full service” becomes the minimal automation discount requirement in 2014.

These are the basic steps for creating an Intelligent Mail barcode in CLMS2web and CLMS2pc. We will use the Labels\Envelopes tab option as an example:

1. Get a one-time 9-digit **Mailer ID (MID)** from the USPS for your Lodge. Also get a **Customer Registration ID (CRID)**. Go to <http://1.usa.gov/QrlzCc> for instructions. You will have to register to use their web site.
2. In CLMS2web “settings,” “mailings,” you may permanently set your 9-digit **MID** code. Also, check “Use **Intelligent Mail Barcode settings –IMB,**” otherwise the old PostNet barcode will print when you specify “Imprint Postal Barcode” in CLMS2pc.
3. In CLMS2pc, under the Labels\Envelopes tab, select “**Imprint Postal Bar Code**” in the Standard Option section.
4. In CLMS2pc, select the proper **Service Type ID (STID)** code. Select one of the 5 **IMb “basic”** choices (during the year 2013) depending on the mail class (First Class, Standard, or Periodicals) and if you put “ADDRESS CORRECTION REQUESTED” or similar ancillary service endorsement (ASE) on your mail. (ASE’s have several variations to instruct the USPS how to handle undeliverable mail. See <http://pe.usps.com/text/qsg300/Q507.htm> The STID setting is also available in CLMS2web, and that will be your default setting. You may change this setting each mailing within CLMS2pc, however.

```
-----select one-----
-----IMb "basic"-----
702 - Std Mail w\ASE
301 - Std Mail no ASE
700 - 1st Class w\ASE
300 - 1st Class no ASE
704 - PERIODICALS no ASE
-----IMb "full service"-----
037 - Std Mail w\ASE
261 - Std Mail no ASE
036 - 1st Class w\ASE
260 - 1st Class no ASE
264 - PERIODICALS no ASE
```

The mail piece **Serial number** is a 6 digit unique sequence code that CLMS2pc automatically assigns within the IMb. CLMS2 is assigning the Serial number for both IMb basic and full service even though it is only a requirement for IMb full service barcode. The **Serial number** is a 6 digit code. The USPS requires the **Serial number** not to repeat within 45 days from one mailing to the next. To achieve this, the Serial number will start at 000001, 000002, 000003, etc. for your first mailing. It will automatically increment starting one digit higher on your next barcode printing, even if you cancel a job and start over or run another mailing job from anywhere within CLMS2pc.

**IMb “full service”** requires printing **special tray tags** which encode your MID. CLMS2pc does not provide this service, however the USPS will. Go to the USPS Business Customer Gateway <https://gateway.usps.com> and look for the **Customer Label Distribution System (CLDS)** under Mail & Transport. Again, the IMb full service tray tag is not required until January 2014 and we recommend specifying IMb “basic” for now.

The USPS has just announced an **IMsb tool** for “small business.” You are free to investigate and choose it as an alternative to IMb creation in CLMS2pc. (It is not any less complex). Go to the USPS Business Customer Gateway <https://gateway.usps.com>. Look for the **Intelligent Mail Small Business (IMsb) Tool** under the Design and Prepare heading. A tutorial of the IMsb tool is available here: < <http://1.usa.gov/TJ8u9W> >

You may generate mailing using the IMb elsewhere in CLMS2cp instead of the Labels\Envelopes tab alone. You may choose to print Member Statements, for example from the Roster tab after selecting just certain members. Or you may create mailings from the Reports tab, Member Card tab or Mail Merge tab. In each section you will see the specification for Service Type ID (STID)(ex: “300 – 1<sup>st</sup> Class no ASE”). The Service Type ID (STID) will have a default value dependent on what was last specified in CLMS2web. Be sure to evaluate the setting each mailing and change it as necessary. Only with Labels\Envelopes are you given a choice to print a postal barcode or none at all, depending on your CLMS2web setting (where “use Intelligent Mail barcode” is selected) and CLMS2pc (where “Imprint Postal Barcode” is selected). Under Rosters, Reports and Mail Merge, CLMS2pc will always produce either a PostNet or IMb barcode (“Use Intelligent Mail barcode” in CLMS2web prints the IMb; unchecked produces a PostNet barcode).